Enterprise Hubs in Dublin

Research Report 2022

Comhairle Cathrach Bhaile Átha Cliath Dublin City Council

Comhairle Contae Átha Cliath Theas South Dublin County Council

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Enterprise Hubs in Dublin

Research Report

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1 Foreword

Enterprise hubs are dynamic, inspirational and engaging centres, spaces or places in which entrepreneurs, innovators and enterprises converge. They are where ideas are generated, connections are made, synergies and collaborations are initiated, projects are launched and ultimately where a multitude of enterprises are started and developed from. Dublin is home to an extensive and diverse array of enterprise hubs, for-profit and not-for-profit, public and private, well established and newly established, hubs that cater to specific types of enterprises and hubs that cater for all types.

Each and every one of these enterprise hubs play a vital role in Dublin's entrepreneurship and innovation ecosystem and towards enterprise and economic development. As well as providing core work space and various development supports, they act as focal points and conduits for different ecosystem actors to interact and overlap, all as part of supporting enterprises to start and develop across Dublin City and County. The hubs provide many different and important supports, facilities and networks to assist their members or tenant enterprises and entrepreneurs.

On account of the COVID-19 pandemic and associated economic crisis, enterprise hubs in Dublin have been significantly impacted in many ways. Despite this, the vast majority have continued to operate and provide extensive and in many cases additional supports to assist their tenant enterprises. The dedication of these hubs to support their tenant enterprises during such uncertain and challenging times is therefore particularly admirable.

As we now look towards the future and recovery from the crisis, this report provides an important overview of enterprise hub provision in Dublin currently and of the impact the crisis has had on hubs and their tenant enterprises. Crucially, it also provides insights directly from enterprise hub representatives regarding the crisis, challenges faced and interventions and supports needed both for hubs and for tenant enterprises going forward. This report will thus be used to inform future planning and recovery responses by the four Dublin Local Authorities and other stakeholder organisations.

The report was led and produced by Dublin City Council in collaboration with Dun Laoghaire Rathdown, Fingal, and South Dublin - County Councils as part of the Dublin Regional Enterprise Plan to 2024 (DREP)[1]. I therefore wish to thank the County Councils and Heads of Enterprise and Economic Development for their assistance along with the DREP Steering Committee and the Action Partners.

Greg Swift

Head of Enterprise and Economic Development – Dublin City Council

2 Acknowledgements

- Enterprise hub representatives. Sincere thanks to those that kindly participated in the survey
- Dublin Local Authority - Heads of Enterprise / Heads of Enterprise and Economic Development:
  - Greg Swift – Dublin City Council LEO
  - Oisin Geoghegan – Fingal County Council LEO
  - Owen Laverty – DLR County Council LEO
  - Tom Rooney – South Dublin County Council LEO
- DREP - Strategic Objective 1, Action 1.1 Action Partners: Dublin City Council / LEO Dublin City (Action Leader), Community Enterprise Association Ireland (CEAI), Enterprise Ireland, Dublin LEOs, Dublin Business Innovation Centre (DBIC), Guinness Enterprise Centre (GEC), Inner City Enterprise (ICE)

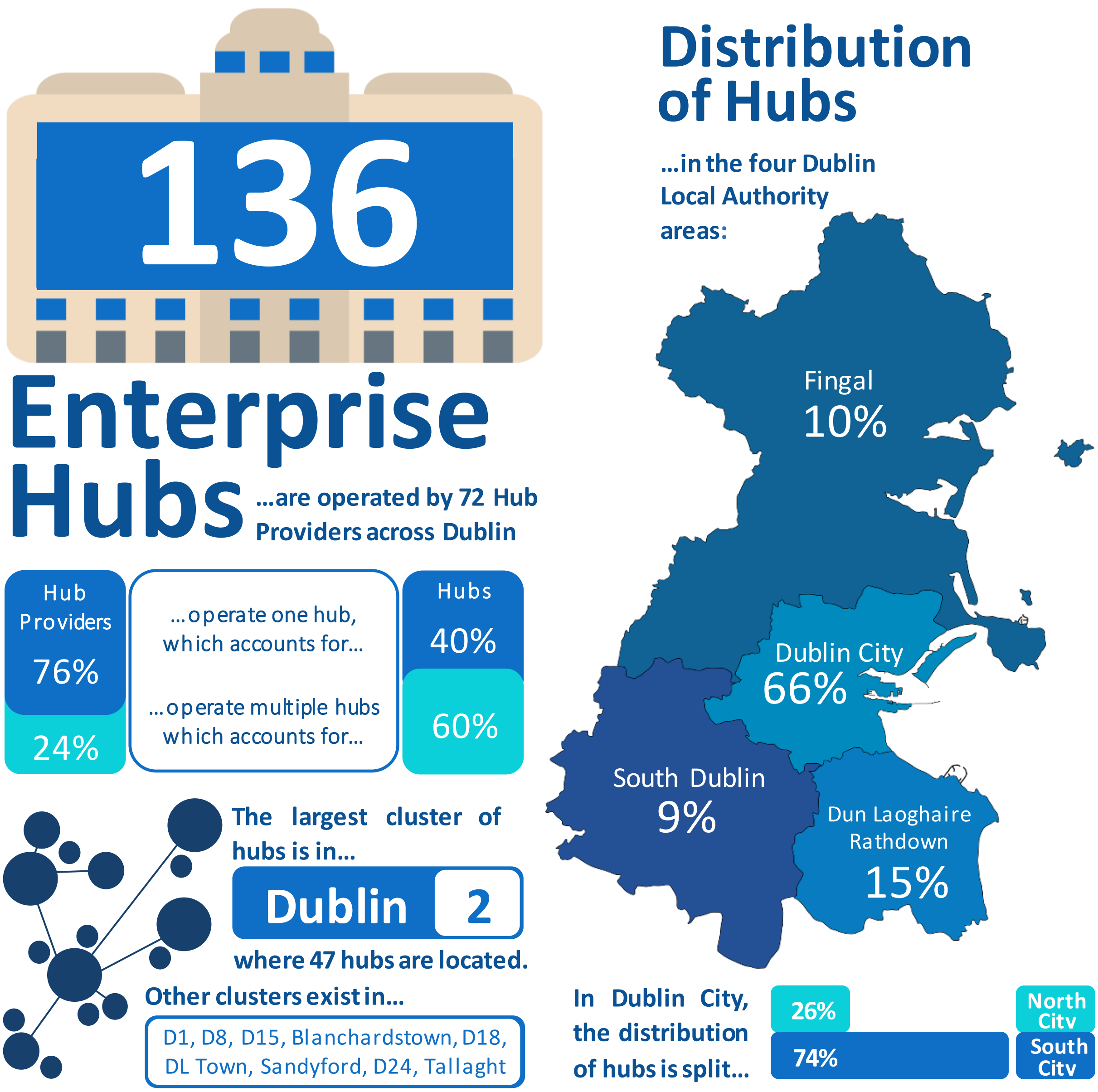
[1] Government of Ireland - Dublin Regional Enterprise Plan to 2024

3 Executive Summary

This report provides an overview of enterprise hub provision in Dublin, generally and in the context of the impact of the COVID-19 pandemic and associated crisis. It features desktop and survey reviews of enterprise hubs in Dublin. The report highlights the extensive array of hubs across Dublin, the significant contribution they make towards enterprise and economic development, the vital role they play in Dublin's entrepreneurship and innovation ecosystem and the impact that the crisis has had on hubs and their tenant enterprises. Within the report, a broad working definition of hubs was used:

> Enterprise hubs are innovation, incubation, enterprise, co-work, research – spaces, centres or places, which in addition to work-space, provide development supports such as networks, advice, events, training and mentoring to tenant enterprises and entrepreneurs. Enterprise hubs provide an integrated and proactive level of entrepreneurship and innovation ecosystem support, beyond operating on a sole landlord basis.

The report was produced as part of completing Strategic Objective 1, Action 1.1: *Supporting Enterprise Hub Provision in Dublin – Review and Support the development of enterprise hub provision in Dublin* - in the Dublin Regional Enterprise Plan to 2024. Below, key findings are summarised.



42% of identified enterprise hub providers participated in the research survey

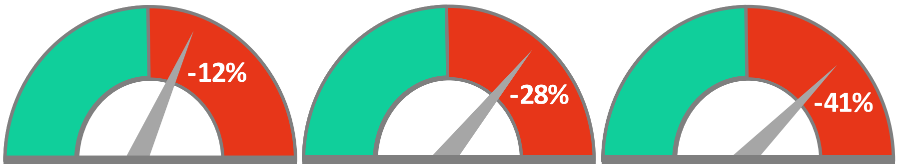
Survey - Key Findings

The most common development services available in enterprise hubs are…

- Events & Workshops
- Networking
- Mentoring & Coaching

The provision of enterprise hubs is increasing in Dublin

COVID-19 Impact on hubs…



	# of Hub Employees	# of Enterprises	# of People
Before C19	180	930	3,649
Currently	158	666	2,165

With Social Distancing	3,100
Without Social Distancing	5,400

…People can be located in hubs

Top Impacts on Hubs

- Decreased Revenue / Rents,
- Less Networking, Engagement, Collaboration
- Decreased Occupancy

Top Impacts on Tenants

- Changed to Remote Working
- Decreased Sales / Income

Hub - Key Challenges

- Occupancy
- Encouraging Tenants to Return
- Rent / Debt / Sales Recovery
- Shift to Hybrid / Remote Working
- Financial Security / Viability

Supports needed for… **Hubs**

- Upgrade - Funding
- Clarity / Promotion
- Tenant Support

Tenant Enterprises

- Grants / Subsidised Rent
- Training / Mentoring
- Tax / Rates Reduction

The majority of hub providers plan to expand or retain their enterprise hub operations within the next 3 years.

4 Introduction

Dublin is a unique city and region, renowned as a hub for culture, heritage and also for entrepreneurship and innovation. Nationally, it is the most popular location for company start-ups and is also the location of many of the world's leading technology companies, including Google, Facebook, Twitter, Microsoft, HP and Dell[2]. It is also one of the youngest capital cities in the European Union and features a young, dynamic and highly educated workforce.

Some 554,554 residents live within the city administrative area while almost 1.4 million residents live in the county[3]. Furthermore, each day, the population of the city and county increases significantly as thousands of people commute to work[4] from the greater Dublin area or further afield[5]. In this regard, 675,000 people representing over 30% of the national workforce, are employed within Dublin City and County[6].

On account of various dynamic and extensive attributes, Dublin ranks competitively alongside many other leading and global cities. Relevant global indices and benchmarks along with Dublin's position are displayed in the table below.

[2] IDA Ireland - Dublin A Technology Hub

[3] Central Statistics Office - Census 2016 Small Area Population Statistics

[4] Central Statistics Office - Census of Population 2016, Profile 11 Employment, Occupations and Industry

[5] DRA & MERA Regional Planning Guidelines for the Greater Dublin Area 2010-2022

[6] CSO Labour Force Survey Quarter 1 2021

Index	Dimension / Criteria	Dublin Position
Global Power City Index 2020	Economy, R&D, Cultural Interaction, Liveability, Environment, Accessibility	31/48 Overall[7]
Startup Genome Global Startup Ecosystem Report 2020	Performance, Funding, Market Reach, Talent, Connectedness, Knowledge, Infrastructure	36/40[8]
Global Startup Ecosystem Index 2021 (Best Cities for Startups)	Quantity, Quality, Business	51/1000[9]
Innovation Cities Index 2021 (Top 100)	Cultural Assets, Human Infrastructure and Networked Markets	92/500[10]
FDI European Cities and Regions of the Future 2020/21	Economic Potential, Human Capital & Lifestyle, Cost Effectiveness, Connectivity, Business Friendliness	3/25 C 2/25 R[11]
Global Financial Centres Index 29 (2021)	Business Environment, Human Capital, Reputation, Infrastructure, Financial Sector Development,	48/114[12]
Global Cities Talent Competitiveness Index 2020	Enable, Attract, Grow, Retain, Global Knowledge Skills	13/155[13]
Smart City Index	Structures & Technology: Health and Safety, Mobility, Activities, Opportunities and Governance	34/109[14]
European Digital Social Innovation Index 2021	Skills, Infrastructure, Diversity and Inclusion, Collaboration, Funding, Civil Society.	18/60[15]

Table 1 Indices & Dublin

Dublin is the most popular location for company start-ups in Ireland, with over 10,000 launched during 2020[16]. Nationally, this represents almost half of all start-ups launched during 2020. Underpinning the high and consistent level of new company start-ups in Dublin is the vibrant entrepreneurship and innovation ecosystem that exists. The ecosystem is made up of diverse networks, linkages and synergies between various actors including investors, policymakers, support organisations, education institutions, entrepreneurs, enterprises, infrastructure providers and importantly enterprise hubs.

Enterprise hubs play a vital and central role in the ecosystem through the key supports they provide and through their multifaceted interaction with many of the other actors directly and indirectly through the enterprises, organisations and entrepreneurs that they support[17] [18] [19]. Enterprise hubs are innovation, incubation, enterprise, co-work, research – spaces, centres or places, which in addition to core work-space, provide development supports such as networks, advice, events, training and mentoring to tenant enterprises and entrepreneurs. They provide an integrated and proactive level of entrepreneurship and innovation ecosystem support, beyond operating on a sole landlord basis.

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7 Global Power City Index 2020
8 Startup Genome Global Startup Ecosystem Report 2020
9 StartupBlink 2021 Global Startup Ecosystem Index (Best Cities for Startups)
10 Innovation Cities Index 2021: Top 100 World's Most Innovative Cities
11 FDI European Cities and Regions of the Future 2020/2021
12 Global Financial Centres Index 29 (2021)
13 Global Cities Talent Competitiveness Index 2020 (p. 97 in Global Talent Competitiveness Index 2020)
14 Smart Cities Index 2020
15 European Digital Social Innovation Index 2021
16 CRIF Vision-Net - Business in Ireland 2021 Barometer Annual Review
17 National Association of Community Enterprise Centres – Strategic Plan 2019-2021
18 UBI – Global World Rankings of Business Incubators and Accelerators
19 Mohsen Kahil & Ellen Olafsen (2010) [p. 69-84 in] The Innovation for Development Report

Dublin is home to an extensive, dynamic and steadily increasing array of such enterprise hubs. Accordingly, Dublin and some of its enterprise hubs are featured on relevant indices and rankings:

- Dublin ranked 4th in the Cushman and Wakefield European Co-working hotspot index 2019[20]
- The Guinness Enterprise Centre (GEC) ranked 2nd in the World Top 5 Private Business Incubator category of the UBI Global World Rankings of Business Incubators and Accelerators 2019- 2020[18]
- Dogpatch Labs ranked 61/150 in Deskbookers Best Coworking Spaces in the World ranking[21]
- Pine Hub was the best coworking space in Dublin in the 2019 Coworker Members Choice Awards[22]
- The Tara Building features in the Ridestore list of 100 Best Coworking Spaces in Europe[23]

The predecessor report to this[24]: Enterprise & Coworking Space Providers in Dublin, was produced in order to develop a better understanding of the impact, contribution and trends regarding enterprise centres, spaces or hubs. It highlighted how enterprise hubs were becoming more prevalent across Dublin and were contributing significantly to and enhancing Dublin's entrepreneurship and innovation ecosystem. At that time in late 2019, the economy was performing exceptionally well with record or exceptionally high levels of employment, economic activity[25] and new companies being formed[16].

Since then, the COVID 19 pandemic and associated economic crisis drastically changed the traditional context for daily living, working, learning and investing[26]. Societal and economic activity was profoundly restricted during the various lockdowns. The previous record or high levels of employment, economic activity and new company formations were significantly and adversely impacted[27] [16]. In particular, the high levels of employment saw the most extreme change as unemployment in Dublin rose above national unemployment levels in quarter 2, 2020[28].

Enterprise hubs in Dublin were also significantly impacted on account of the pandemic. They were faced with unprecedented challenges as they tried to support their tenant enterprises and manage their operations despite restrictions, new health and safety requirements and great overall uncertainty. Going forward into the recovery, it is important to review enterprise hub provision, to ascertain the impact of the crisis and to identify how hubs can be supported in future. This report thus seeks to compliment the previous report on hub provision in Dublin and to review hub provision in the context of the impact of the COVID 19 pandemic. It was produced as part of the completion of Strategic Objective 1, Action 1.1 in the Dublin Regional Enterprise Plan to 2024[1].

<table>
<tr><th colspan="3">Dublin Regional Enterprise Plan to 2024</th></tr>
<tr><td colspan="3">S.O.1: Strengthen resilience and the potential for scaling amongst Dublin SMEs and Start-Ups</td></tr>
<tr><td colspan="3">A 1.1: Supporting Enterprise Hub Provision in Dublin – Review and Support the development of enterprise hub provision in Dublin</td></tr>
<tr><td>Action Leader</td><td>Action Partners</td><td>For completion by</td></tr>
<tr><td>Dublin City Council / LEO Dublin City</td><td>CEAI, EI, Dublin LEOs, DBIC, GEC, ICE</td><td>Q1 2024</td></tr>
<tr><td colspan="3">Action Outcome: Research report completed - featuring review of enterprise hub provision in Dublin, impact of the crisis on hubs and the identification of potential supports needed by hubs</td></tr>
</table>

[20] Cushman & Wakefield European Coworking Hotspot Index 2019
[21] Deskbookers – Best 150 Coworking Spaces in the World
[22] Coworker – 2019 Coworker Members Choice Awards Winners: Europe
[23] Ridestore Magazine – 100 Best Coworking Spaces in Europe
[24] Enterprise & Co-Working Space Providers in Dublin – Research Report
[25] Dublin Economic Monitor – Issue 20
[26] Department of Finance – Economic Insights, Economic Statistics during Covid 19
[27] Dublin Economic Monitor – Resources (Unemployment, Employment, PMI)
[28] Dublin Economic Monitor – Issue 22

4.1 Research Report Goal & Objectives

Following on from the previous research report in 2019, the goal of this report is to review enterprise hub provision in Dublin, generally and within the context of the impact of the COVID 19 pandemic and associated economic crisis.

The objectives are to:

- Ascertain the impact of the crisis on enterprise hubs and tenant enterprises / entrepreneurs
- Obtain insights and ideas for potential interventions / supports to assist enterprise hubs and tenant enterprises and entrepreneurs, currently and in the recovery
- Review and update the profile of enterprise hubs and the contribution they make to the ecosystem and to enterprise and economic development
- Identify trends within the enterprise hub sector

The report and findings will be used to inform future planning and recovery responses by the four Dublin Local Authorities, other stakeholder organisations and various policies, strategies and plans.

4.2 Research Methodology

In order to review and analyse enterprise hub provision, the following approach was used.

- Desktop Review. A desktop review was initially conducted to identify relevant enterprise hubs within Dublin. The identification of enterprise hubs was made in the context of the predecessor report[24] to this and in acknowledgement of the dynamic and overlapping nature of the different types of enterprise hubs. Therefore, within this report and the associated research, the term 'enterprise hub' is used as an overall term, inclusive of specialist types of hubs such as incubators, scaling, research and development, co-working and community and enterprise hubs[29]. A broad working definition of enterprise hubs was used within the research report:

  Enterprise hubs are innovation, incubation, enterprise, co-work, research – spaces, centres or places, which in addition to work-space, provide development supports such as networks, advice, events, training and mentoring to tenant enterprises and entrepreneurs. Enterprise hubs provide an integrated and proactive level of entrepreneurship and innovation ecosystem support, beyond operating on a sole landlord basis.

  Please note: The desktop review was conducted during quarters 2 and 3, 2021 when the hubs featured in this report were identified at that point in time and according to the above mentioned working definition. If a hub was not featured in this report or has changed since, please inform the Economic Development Office of Dublin City Council.

- Survey. Following the desktop review, all of the identified hub providers were invited to participate in a survey that sought to elucidate insights, ideas and perspectives from hub representatives. The survey featured a series of questions that were aligned with the research objectives, stated above.

  The survey invitation was sent to relevant hub representatives by the Local Enterprise Offices in Dublin City Council, Dun Laoghaire Rathdown County Council, Fingal County Council and South Dublin County Council. The survey was conducted during quarter 3, 2021. The report and research were led by Dublin City Council in collaboration with Dun Laoghaire Rathdown, Fingal and South Dublin - County Councils.

[29] Atlantic Economic Corridor – AEC Hubs Classification 2020-2023

5 Review & Analysis

The findings and analysis of both the desktop review and survey are featured below. The desktop review provides an initial and detailed overview of enterprise hubs in Dublin along with subsequent analysis regarding the distribution and location of hubs across the city and county of Dublin. The survey review reveals the findings from the survey of enterprise hub representatives. It provides key insights directly from hub representatives along with the identification of overarching trends within the enterprise hubs sector in Dublin.

5.1 Desktop Review – Overview of Enterprise Hubs in Dublin

The desktop review was conducted during quarters 2 and 3, 2021 to identify relevant hubs in Dublin. The overview tables below feature the 136 enterprise hubs and 72 enterprise hub providers that were identified. The hubs are categorised according to the local authority administrative area that they are located in. The number of other hubs that hub providers manage / operate is also noted.

Enterprise hubs were counted individually within each local authority area where they are located. However, enterprise hub providers were counted once according to their primary / headquarters location. Thus, a hub provider that operates multiple hubs in different local authority administrative areas is only counted once as per its primary / headquarters location.

5.1.1 Table Overview of Enterprise Hubs in Dublin

Dublin City

# Providers	# Hubs	Enterprise Hubs	Location		# Providers	# Hubs	Enterprise Hubs	Location		# Providers	# Hubs	Enterprise Hubs	Location
1	1	Ballymun Whitehall Enterprise Centre	D11		19	31	Guinness Enterprise Centre	D8		30	61	Number 9	D1
2	2	Bank of Ireland Work Bench	D2		20	32	Greendale Coworking Space	D5		31	62	Office Suites Club	D2
	3	Bank of Ireland Work Bench	D2		21	33	Huckletree	D2		32	63	Premier Business Centres	D2
	4	Bank of Ireland Work Bench	D2		22	34	Iconic Offices	D8			64	Premier Business Centres	D1
	5	Bank of Ireland Work Bench	D2			35	Iconic Offices	D2		33	65	Regus	D7
	6	Bank of Ireland Work Bench	D2			36	Iconic Offices	D2			66	Regus	D2
	7	Bank of Ireland Work Bench	D9			37	Iconic Offices	D2			67	Regus	D2
3	8	Block T	D8			38	Iconic Offices	D2			68	Regus	D2
4	9	Broombridge Business Centre	D7			39	Iconic Offices	D2			69	Regus	D4
5	10	Carmichael	D7			40	Iconic Offices	D2		34	70	Space @ Dublin BIC	D8
6	11	Cluster	D2			41	Iconic Offices	D2		35	71	SPADE Enterprise Centre	D7
7	12	CoCreate	D1			42	Iconic Offices	D2		36	72	Tangent	D2
	13	CoCreate	D2			43	Iconic Offices	D2		37	73	Talent Garden	D11
8	14	Cork St. Studios	D8			44	Iconic Offices	D2		38	74	tcube	D2
9	15	DCU Alpha	D11			45	Iconic Offices	D2		39	75	Terenure Enterprise Centre	D6W
10	16	DHDA (Digital Hub)	D8			46	Iconic Offices	D2		40	76	The Chocolate Factory	D1
11	17	Dogpatch Labs	D1			47	Iconic Offices	D2		41	77	The Tara Building	D2
12	18	DoSpace	D2			48	Iconic Offices	D2		42	78	The Buckley Coworking	D1
13	19	DoCentre	D8		23	49	Innovate Communities	D9		43	79	The Tower	D2
14	20	eDot Connect	D2		24	50	Invent DCU	D9		44	80	TU Dublin Hothouse	D7
15	21	Element 78	D2		25	51	Liffey Trust (Enterprise) Centre	D1		45	81	Us&Co	D2
	22	Element 78	D7		26	52	MART	D6		46	82	Wework	D2
16	23	FlexHuddle	D6W			53	MART	D6			83	Wework	D1
17	24	Fumbally Exchange	D8			54	MART	D6			84	Wework	D2
18	25	Glandore	D2			55	MART	D8			85	Wework	D2
	26	Glandore	D2			56	MART	D12			86	Wework	D2

	27	Glandore	D2		57	MART	D12	47	87	Workhub	D2
	28	Glandore	D2	27	58	NCI Business Incubation Centre	D1		88	Workhub	D2
	29	Glandore	D2	28	59	New Work Junction	D6		89	Workhub	D2
	30	Glandore	D4	29	60	Northside Enterprise Centre	D17		90	Workhub	D6
Total # of Providers in Area			47	Hub Clusters		D2, D1, D8					
Total # of Hubs in Area			90								
Fingal											
# Providers	**# Hubs**	**Enterprise Hubs**	**Location**	**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**	**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**
1	1	Balbriggan Enterprise And Training Centre BEaT	Co N	4	6	Drinan Enterprise Centre	Co N		11	Regus	D9
	2	Bank of Ireland Workbench	D15	5	7	LINC Blanchardstown IT	D15		12	Regus	Co N
2	3	Base Enterprise Centre	D15	6	8	M-Space Malahide	Co N	8	13	The View	Co N
3	4	Creative Dock	Co N	7	9	Pine Hub	D15				
	5	DoCentre	Co N		10	Regus	D15				
Total # of Providers in Area			8	Hub Clusters		D15, Blanchardstown					
Total # of Hubs in Area			13								
South Dublin											
# Providers	**# Hubs**	**Enterprise Hubs**	**Location**	**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**	**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**
1	1	ACE Park	D22		6	The Edge	D24	6	11	Synergy Centre ITT	D24
	2	ACE Enterprise Centre	D22	4	7	Partas - Brookfield Enterprise Centre	D24		12	Synergy Global	D24
2	3	Arrow Serviced Offices	D24		8	Partas - Killinarden Enterprise Centre	D24				
3	4	Elephant Flexi Offices	D24		9	Premier Business Centre	D24				

	5	Partas - Tallaght Enterprise Centre	D24		5	10	The Link Business Centre	D12					
Total # of Providers in Area			6		Hub Clusters		D24, Tallaght						
Total # of Hubs in Area			12										
Dun Laoghaire Rathdown													
# Providers	**# Hubs**	**Enterprise Hubs**	**Location**		**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**		**# Providers**	**# Hubs**	**Enterprise Hubs**	**Location**
	1	Bank of Ireland Workbench	D4		6	8	Nutgrove Community Enterprise Centre CLG (Nutgrove Enterprise Park)	D14			15	Regus	D18
1	2	COWORKINN	D18			9	Office Suites Club	Co			16	Regus	D18
2	3	Harbour View	Co		7	10	Office Pods	D4		9	17	Saint Kieran's Enterprise Centre	D18
3	4	Head Office	Co			11	Office Pods	Co		10	18	The Media Cube IADT	Co
4	5	Hour Kitchen	D14			12	Office Pods	Co		11	19	The Glasshouses	Co
	6	MART	Co			13	Office Pods	Co			20	The Glasshouses	Co
5	7	NOVA UCD	D4		8	14	Dun Laoghaire Enterprise Centre	Co			21	Workhub	D18
Total # of Providers in Area			11		Hub Clusters		D18, Dun Laoghaire Town, Sandyford						
Total # of Hubs in Area			21										
Total # of Providers in Dublin			**72**										
Total # of Hubs in Dublin			**136**										

Table 2 Overview of Enterprise Hubs in Dublin

5.1.1 Findings and Analysis

As seen in the overview tables above, an extensive range of enterprise hubs are located across Dublin. Stemming from the overview and from further analysis, the following findings were deduced.

5.1.1.1 Enterprise Hub Provider Configuration

The vast majority (55 / 76%) of hub providers operate just one hub in Dublin. The single hubs that these hub providers operate account for 55 / 40% of the total hubs located throughout Dublin. Conversely, a minority of hub providers (17 / 24%) operate multiple hubs, which interestingly account for the majority (81 / 60%) of the total hubs identified.

Hub Providers

76%

24%

...operate one hub, which accounts for...

-

...operate multiple hubs which accounts for...

Hubs

40%

60%

Figure 1 Enterprise Hub Provider Configuration

5.1.1.2 Enterprise Hub Distribution in Dublin Post Code Areas

Hubs exist in almost all the Dublin post code areas. The largest cluster is in the Dublin 2 area where 47 hubs (35%) are located. As revealed in Figure 2 below, D1, D8 and D24 also feature notable concentrations of hubs. Of the 18 hubs that are located in 'CO' or County Dublin area, 11 are located in the Dun Laoghaire Rathdown area while 7 are located in the Fingal / North County Dublin area.

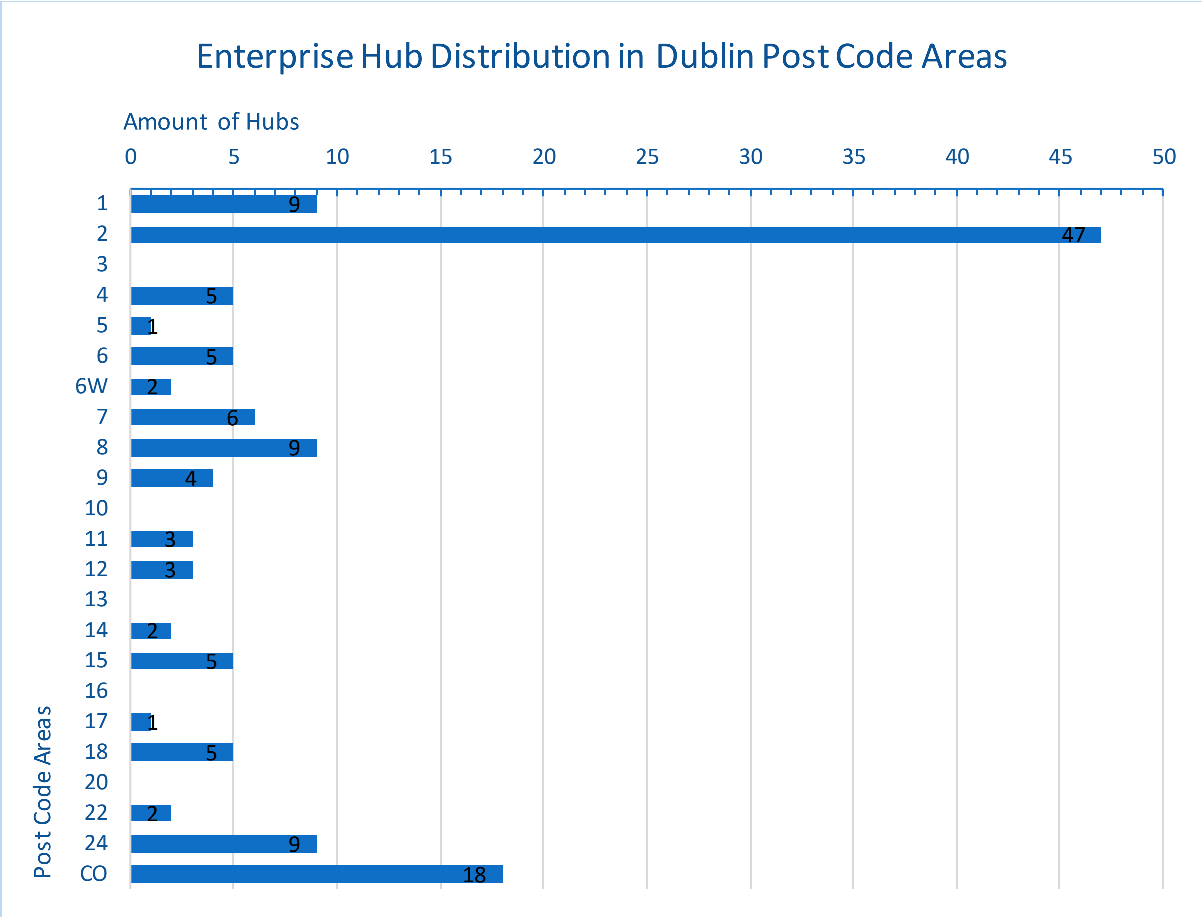

Figure 2 Enterprise Hub Distribution in Dublin Post Code Areas

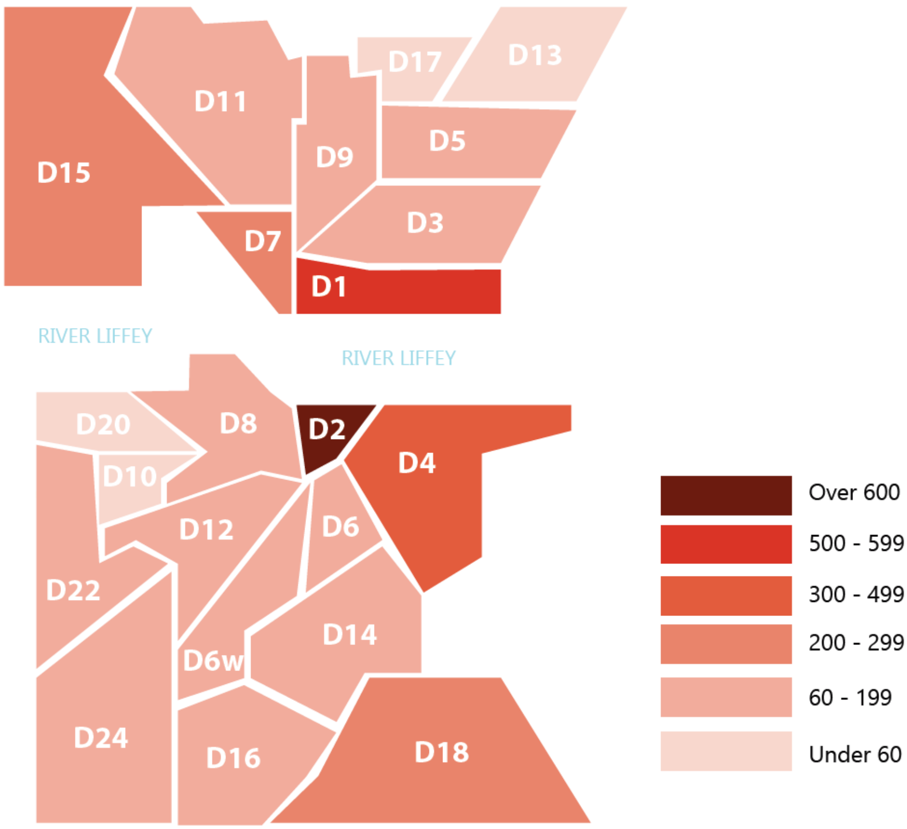

Figure 3 Company Start-up Location in Dublin Post Code Areas (Source: CRIF Vision Net 2022)

In regard to Dublin 2 being the location of the largest cluster of hubs in Dublin, it is pertinent to note the correlation that exists with Dublin 2 also being the location of the largest cluster of company start-ups in Dublin. CRIF Vision Net provided a heat-map (displayed above in Figure 3) in the Business in Ireland 2021 Barometer Annual Review[16] which reveals the 'hottest postcodes' in Dublin for company start-ups during 2020. As highlighted in the review, Dublin 2 accounted for 800 company start-ups, D1 for 509 and D4 for 338. The least popular postcode areas were D10 (11), D17 (12) and D20 (28).

Despite the extensive distribution of hubs throughout Dublin, there are a number of post code areas that do not currently have hubs located in them. These areas are listed in the table below. There are many factors that influence the location of company start-ups, however, interestingly there is a correlation between the post code areas that do not have enterprise hubs and the post code areas that have lower (D3, D13, D16, D20) or the lowest (D10) levels of company start-ups.

Dublin Post Code Areas without Enterprise Hubs	
Dublin Post Code Area	**Local Authority Area**
Dublin 3	Dublin City
Dublin 10	Dublin City
Dublin 13	Fingal
Dublin 16	Dun Laoghaire Rathdown / South Dublin
Dublin 20	Dublin City / South Dublin

Table 3 Dublin Post Code Areas without Enterprise Hubs

5.1.1.3 Enterprise Hub Distribution in Dublin Local Authority Areas

Enterprise hubs are located right across Dublin. As highlighted in the summary table below, the distribution of hubs is spread across each of the Dublin local authority areas. Dublin City accounts for a high concentration and the majority of hubs with 90 hubs or 66% located in the city administrative area, followed by Dun Laoghaire Rathdown with 21 / 15%, Fingal with 13 / 10% and South Dublin with 12 / 9%. In each local authority area, clusters of hubs also exist, such as Dublin 2 (D2), D1 and D8 in Dublin City; D18, Dun Laoghaire Town and Blackrock in Dun Laoghaire Rathdown; D15 / Blanchardstown in Fingal; and D24 / Tallaght in South Dublin.

Enterprise Hub Distribution in Dublin Local Authority Areas			
Dublin Local Authority	**Hubs #**	**%**	**Clusters**
▪ Dublin City Council	90	66	D2, D1, D8
▪ Dun Laoghaire Rathdown County Council	21	15	D18, DL Town, Sandyford
▪ Fingal County Council	13	10	D15, Blanchardstown
▪ South Dublin County Council	12	9	D24, Tallaght
Total	**136**	**100**	

Table 4 Enterprise Hub Distribution in Dublin Local Authority Areas

5.1.1.4 Enterprise Hub Distribution in Dublin City

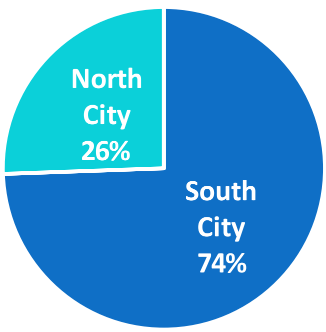

Figure 4 Enterprise Hub Distribution in Dublin City

Dublin City accounts for the majority of hubs with 90 hubs or 66% located in the city administrative area. In regard to the 90 hubs, there is a significant difference between the distribution of hubs in the north city and the south city. As can be seen in Figure 4, the south city accounts for the vast majority with 67 / 74% of enterprise hubs, while the north city accounts for 23 / 26% of hubs. (Please note: Some Dublin post code areas extend into other local authority areas. Only hubs located in the Dublin City administrative area were included in this analysis)

5.1.1.5 Enterprise Hub Distribution and Dublin Unemployment Blackspots

As part of recent censuses, the CSO analysed and highlighted areas with unemployment levels that are much higher relative to the State overall level. The most current census data available is still the Census 2016. On account of the COVID-19 crisis, the Census 2021 was postponed to be conducted during 2022.

According to the 2016 Census, unemployment blackspots are defined as electoral divisions (ED) with a labour force that exceeds 200 people and where the unemployment rate exceeded 27%. 79 such black spots were identified throughout Ireland in the last census. In the context of Dublin, unemployment blackspots exist in the Dublin City and South Dublin administrative areas. By administrative area or county, Dublin City ranked 3rd highest nationally with 7 unemployment blackspots. The average unemployment rate in the 7 Dublin City blackspots was 30.4% compared to the county / administrative area unemployment rate of 12.9%. South Dublin ranked 7th nationally with 4 unemployment blackspots and an average unemployment rate of 29.4% in the blackspots compared to the county / administrative area unemployment rate of 13.3%[30]. The current unemployment blackspots in Dublin (Dublin City and South Dublin) are displayed in the table below. The wider post code areas in which the electoral divisions exist are also referenced.

Census 2016 Unemployment Blackspots - Dublin[31]					
Dublin City					
Electoral Division	Unemployment Rate %	P. Code	Electoral Division	Unemployment Rate %	P. Code
Priorswood B	36.2	D17	Finglas North A	28.9	D11
Ballymun D	32.1	D11	Finglas South C	28.7	D11
Ballymun B	31.8	D11	Ballymun C	28.0	D9
Kilmore C	29.9	D17			
South Dublin					
Electoral Division	Unemployment Rate %	P. Code	Electoral Division	Unemployment Rate %	P. Code
Tallaght-Killinardan	32.9	D24	Tallaght-Fettercairn	28.0	D24
Clondalkin-Cappaghmore	32.2	D22	Clondalkin-Rowlagh	27.2	D22

Table 5 Census 2016 Unemployment Blackspots - Dublin

Enterprise Hub Distribution in Dublin Post Code Areas & Blackspots		
Dublin Post Code Area	**# of U. Blackspots**	**# of Hubs**
D9	1	4
D11	4	3
D17	2	1
D22	2	2
D24	2	9

Table 6 Enterprise Hub Distribution in Dublin Post Code Areas & Blackspots

[30] CSO 2017 – Census 2016 Summary Results – Part 2 (p. 25)
[31] CSO 2017 – Census 2016 Summary Results – Part 2 Appendices (p. 117)

As highlighted in Table 6 above, various enterprise hubs do exist in the wider post code areas in which the designated blackspots exist. Nonetheless, upon a much closer inspection of the specific blackspot areas / electoral divisions[32] as highlighted in Table 7 below, it is interesting to note that 4 of the 7 areas designated as blackspots in Dublin City are areas where there are no enterprise hubs in them. Although a slight correlation exists in Dublin City between blackspots and areas without hubs, in South Dublin the correlation is not evident. Only 1 of the 4 areas designated as a blackspot does not have an enterprise hub located in it. Finally and conversely, it is also important to note that the Dublin post code areas which do not currently have a hub in them (D3, D10, D13, D16, D20), do not have unemployment blackspot areas located within them.

Enterprise Hub Distribution in Dublin Unemployment Blackspots			
Dublin City			
Blackspot Area	**Hub**	**Blackspot Area**	**Hub**
Priorswood B	0	Finglas North A	0
Ballymun D	0	Finglas South C	0
Ballymun B	Ballymun Whitehall Enterprise Centre	Ballymun C	Innovate Communities Social Innovation Hub
Kilmore C	Northside Enterprise Centre		
South Dublin			
Blackspot Area	**Hub**	**Blackspot Area**	**Hub**
Tallaght-Killinardan	Partas (Kilinardan)	Tallaght-Fettercairn	-Partas (Brookfield Enterprise Centre) -Premier Business Centre -Synergy Global
Clondalkin-Cappaghmore	0	Clondalkin-Rowlagh	ACE Enterprise Centre Neilstown

Table 7 Enterprise Hub Distribution in Dublin Unemployment Blackspots

[32] Central Statistics Office – Census 2016 Small Area Population Statistics

5.1.2 Comparison with Desktop Review 2019

As this report follows on from the previous Enterprise & Co-Working Space Providers in Dublin – Research Report 2019, it is possible to conduct some comparisons with the findings from the desktop review in 2019. It is important to note some considerations when comparing the data. For instance, a number of additional hubs were identified as part of the 2021 desktop review which were in existence in 2019. Some of the changes revealed in the below comparisons are due to enhanced identification of hubs in the 2021 review. The comparisons thus, do not uniformly confirm growth in the hub sector.

Enterprise Hub Distribution in Dublin Local Authority Areas 2019 & 2021 Comparison						
	2019		2021		2019	2021
Dublin Local Authority	**Hubs #**	**%**	**Hubs #**	**%**	**Clusters**	**Clusters**
▪ Dublin City Council	81	71	90	66	D2, D8	D2, D1, D8
▪ Dun Laoghaire Rathdown CC	14	12	21	15	DL Town, Sandyford Business Pk.	D18, DL Town, Sandyford
▪ Fingal County Council	11	10	13	10	D15, Blanchards-town	D15, Blanchards-town
▪ South Dublin County Council	8	7	12	9	D24, Tallaght	D24, Tallaght
Total	**114**	**100**	**136**	**100**		

Table 8 Enterprise Hub Distribution in Dublin Local Authority Areas 2019 & 2021 Comparison

The distribution of hubs across the 4 Dublin local authority areas remained relatively similar between 2019 and 2021. Dublin City saw a 5% reduction in its share of hubs which was redistributed to Dun Laoghaire Rathdown and South Dublin County Councils via the slight increases in the amount of hubs identified in their respective areas. Clusters in each of the areas remained relatively similar as well, however, D1 in Dublin City and D18 in Dun Laoghaire Rathdown were identified as new cluster areas in the 2021 review.

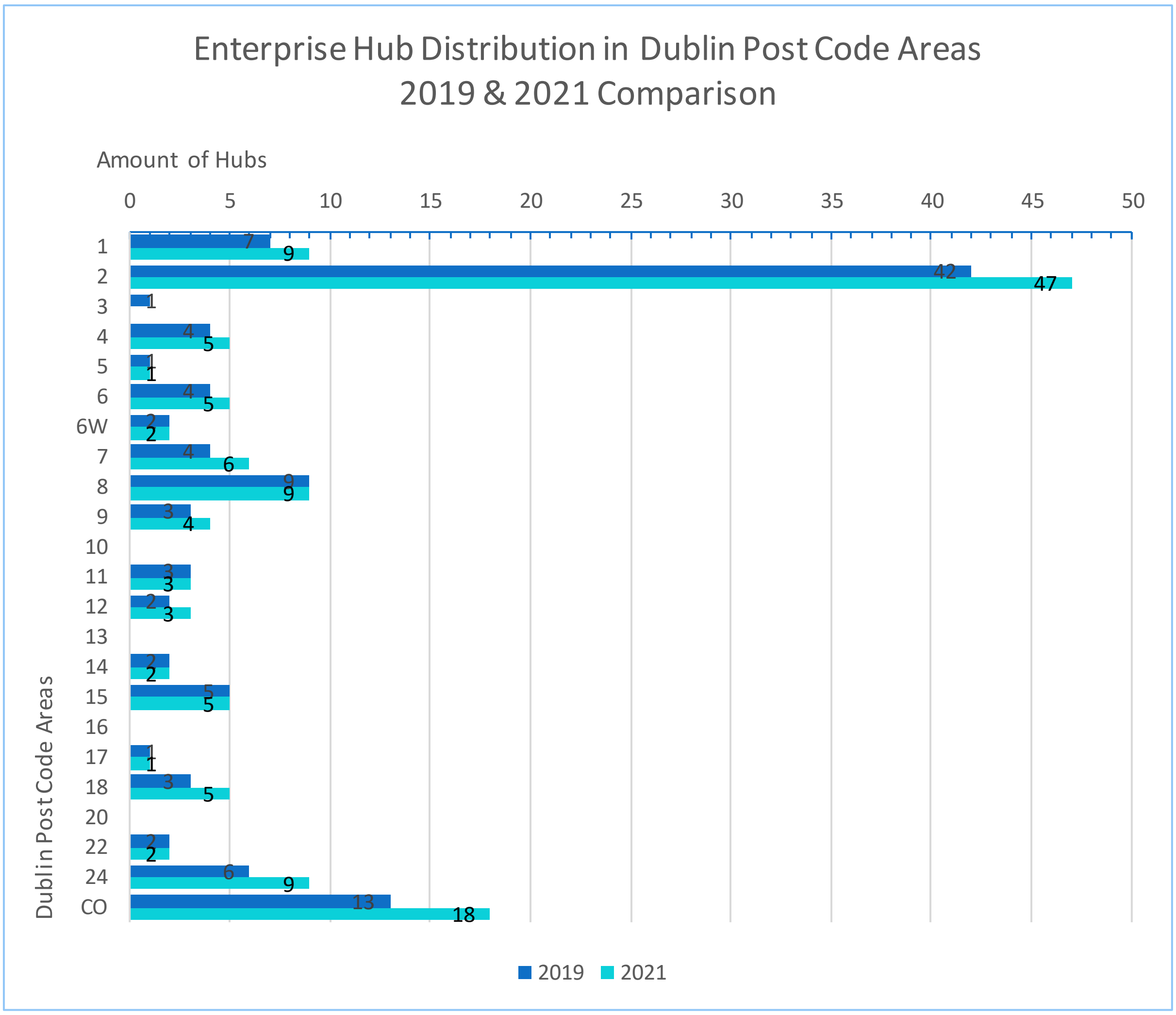

Figure 5 Enterprise Hub Distribution in Dublin Post Code Areas 2019-2021 Comparison

As can be seen in Figure 5 above, there are slight changes in the amount of hubs located in Dublin post code areas between 2019 and 2021. A total of 114 hubs were identified in 2019, whereas 136 hubs were identified in the 2021 review. By comparing the data, a number of findings are evident:

- The four post code areas (D10, D13, D16, D20) that were identified as areas without an enterprise hub in 2019, remain as areas without an enterprise hub in 2021.
- Dublin 2 continues to be a significant outlier with the greatest cluster of hubs, again by a large margin.
- All of the previously identified clusters of hubs in post code areas are still evident as clusters.
- The number of hubs in the majority of post code areas remained relatively similar, however, D2 and Co / County Dublin saw the greatest change as 5 additional hubs were identified in the 2021 review.

5.2 Survey Review – Enterprise Hub Insights

The 72 enterprise hub providers identified in the desktop review were subsequently invited to participate in a survey that sought to elucidate their insights, ideas and perspectives regarding:

- The impact of the COVID-19 crisis on their hub(s) and tenant enterprises and entrepreneurs
- Potential interventions / supports needed currently and in the recovery
- Their contribution to the ecosystem and to development
- Trends and outlooks for the future

42% of the identified hub providers participated in the survey which provides an effective research sample size. Of the hub providers that participated, 67% operate single hubs while 33% operate multiple hubs. This sample thus aligns relatively closely with the overall configuration of enterprise hubs noted above in the desktop review (76% of enterprise hubs in Dublin operate single hubs / 24% operate multiple hubs). The survey review features the anonymised and compiled findings from the responses of different enterprise hub representatives. It provides key insights along with the identification of overarching trends within the enterprise hubs sector of Dublin.

42%

…of the identified Enterprise Hub providers participated in the research survey

5.2.1 Findings and Analysis (Configuration and Contribution)

5.2.1.1 Enterprise Hubs Status

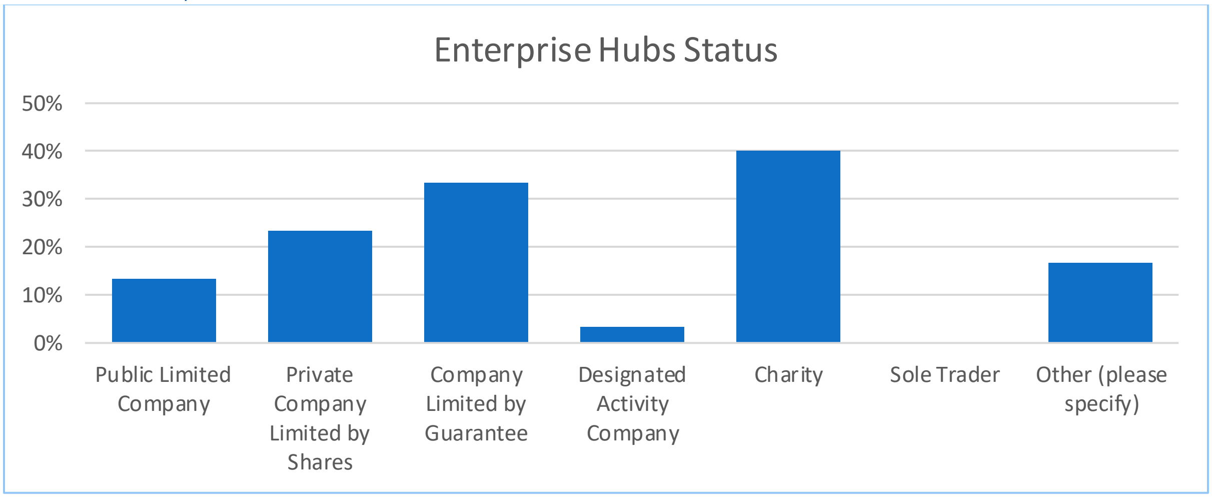

Figure 6 Enterprise Hubs Status

Among respondents, the most common hub status is Charity followed by Company Limited by Guarantee, Private Company Limited by Shares and then Public Limited Company. Of those that selected Other, different respondents clarified that they operate as a government agency, university incubator, limited partnership or as a social enterprise.

5.2.1.2 Enterprise Hubs Operational Basis

The majority of hubs operate on a Not For Profit basis. Nonetheless, the minority at 40% is still significant which indicates that both For Profit and Not For Profit bases are pursued by hubs in Dublin.

Figure 7 Enterprise Hubs Operational Basis

5.2.1.3 Enterprise Hubs Year of Establishment

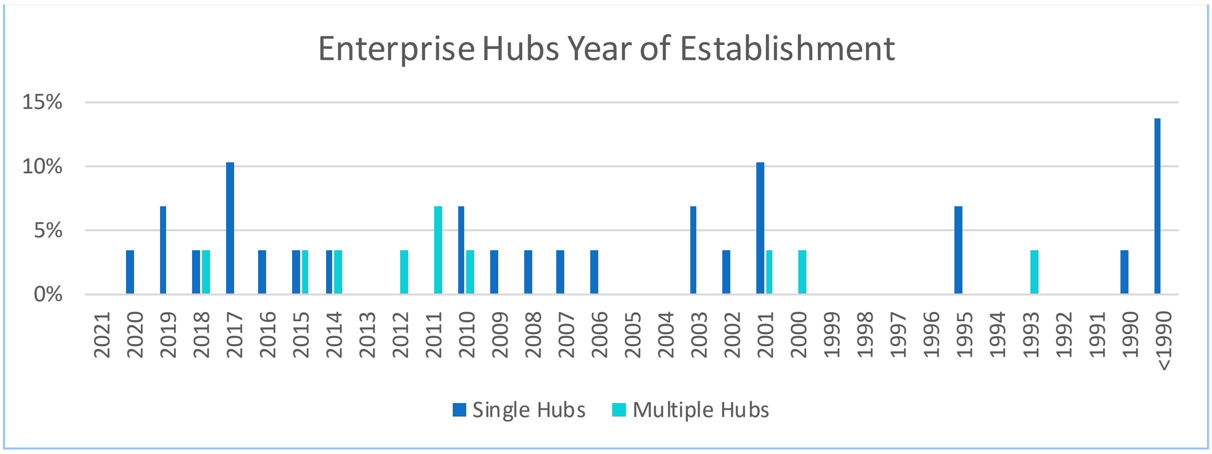

Figure 8 Enterprise Hubs Year of Establishment

The majority of hubs were established during the last 15 years (2006-2021). There has been particularly consistent growth of hubs between 2014-2021, during which, at least one hub was established each year. Of the respondents that operate multiple hubs, the majority established their additional hubs during the last 11 years (2010-2021). Overall, the findings displayed in Figure 8 indicate a trend of steadily increasing provision of enterprise hubs in Dublin.

5.2.1.4 Sectors Catered for by Enterprise Hubs

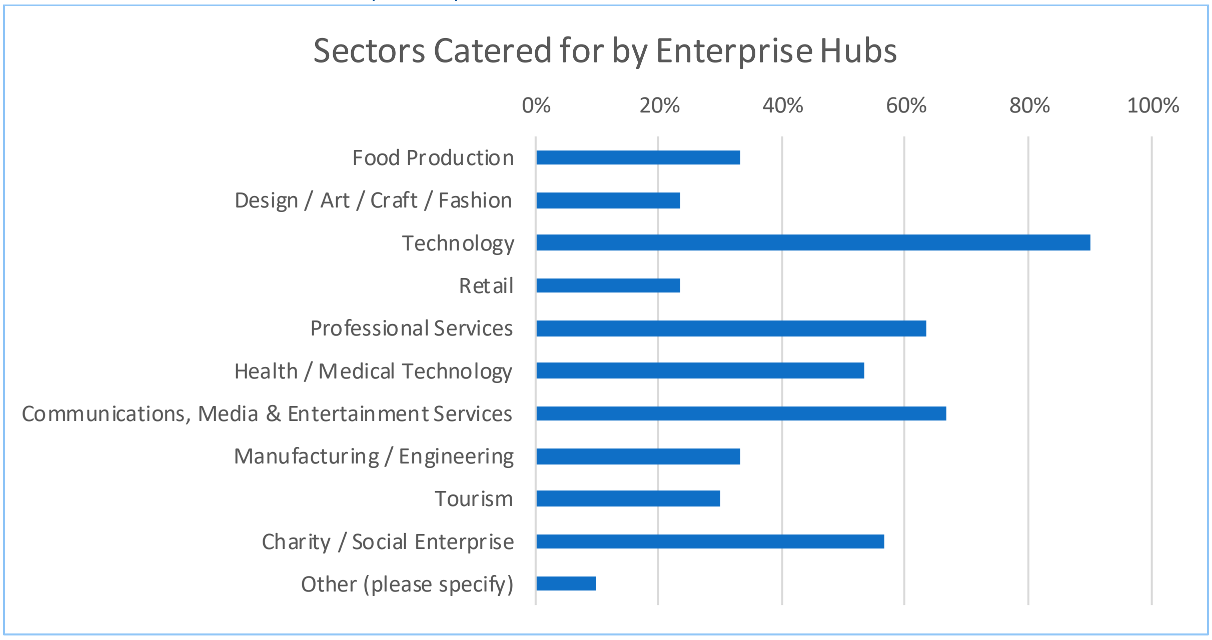

Figure 9 Sectors Catered for by Enterprise Hubs

The most common sector that respondents' hubs cater for is Technology followed by Communications, Media & Entertainment Services and then Professional Services. A significant proportion of hubs (57%) also cater for Charities / Social Enterprises. Of those that stated Other, some specified other sectors or examples of activities which they cater for including: cookery classes, food photography / videography and government.

5.2.1.5 Unit Types Available

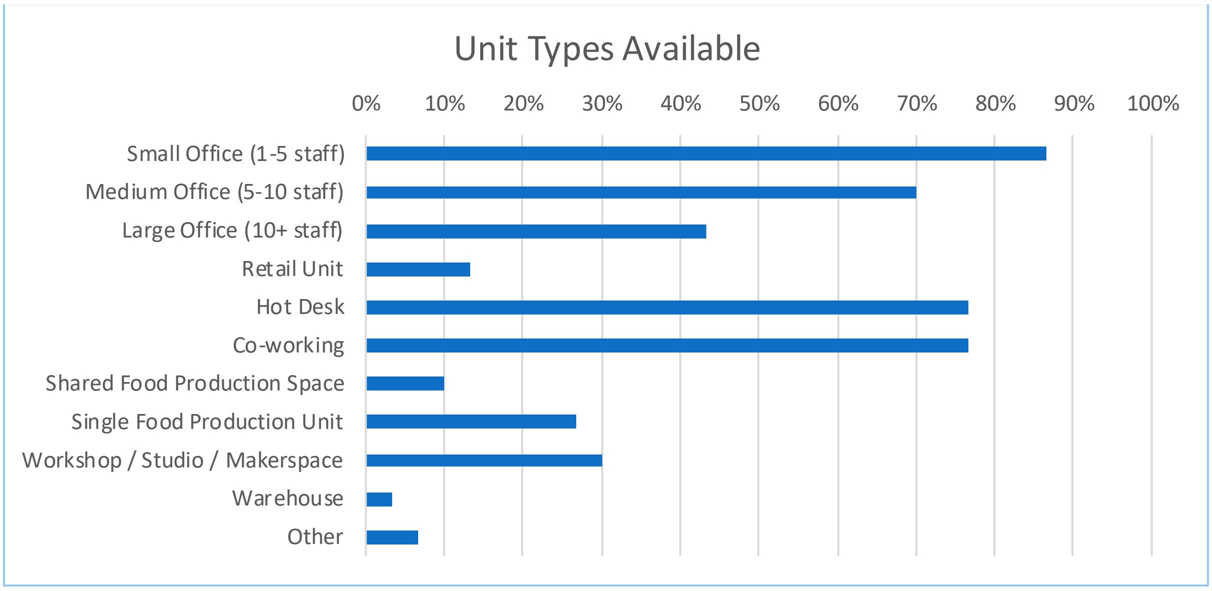

Figure 10 Unit Types Available

The majority of hubs provide Small Office and Medium Office Units as well as Hot Desk and Co-working space. Many also provide Large Office Units (43%). Although a minority, a significant proportion provide Workshop / Studio / Makerspace (30%) and or Single Food Production Units (27%). Some respondents selected Other and specified additional units types that they provide such as Training Units and Classrooms, Virtual Office Units and Meeting Rooms.

5.2.1.6 Facilities Available

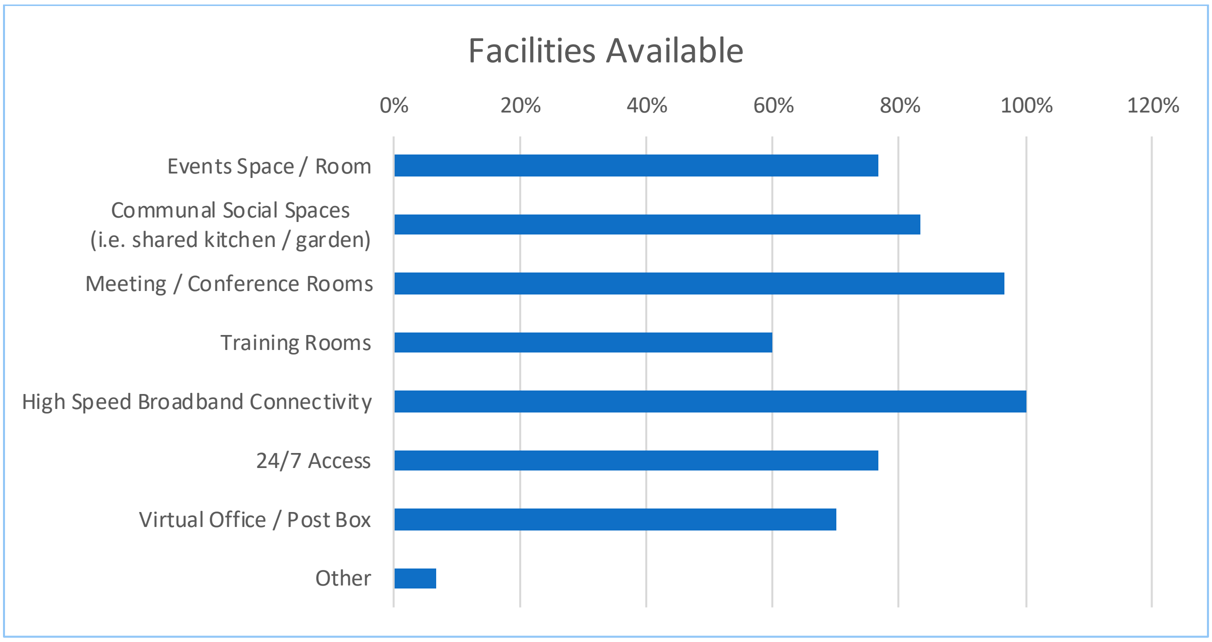

Figure 11 Facilities Available

Various facilities are available to tenant enterprises / entrepreneurs / individuals in respondents' hubs. Interestingly, all of the facility types listed in Figure 11 are available in the majority of respondents' hubs. Of those that selected Other, some respondents provided examples of additional facilities available to tenants, such as Wet Lab and Broadcast Studio.

5.2.1.7 Development Services Available

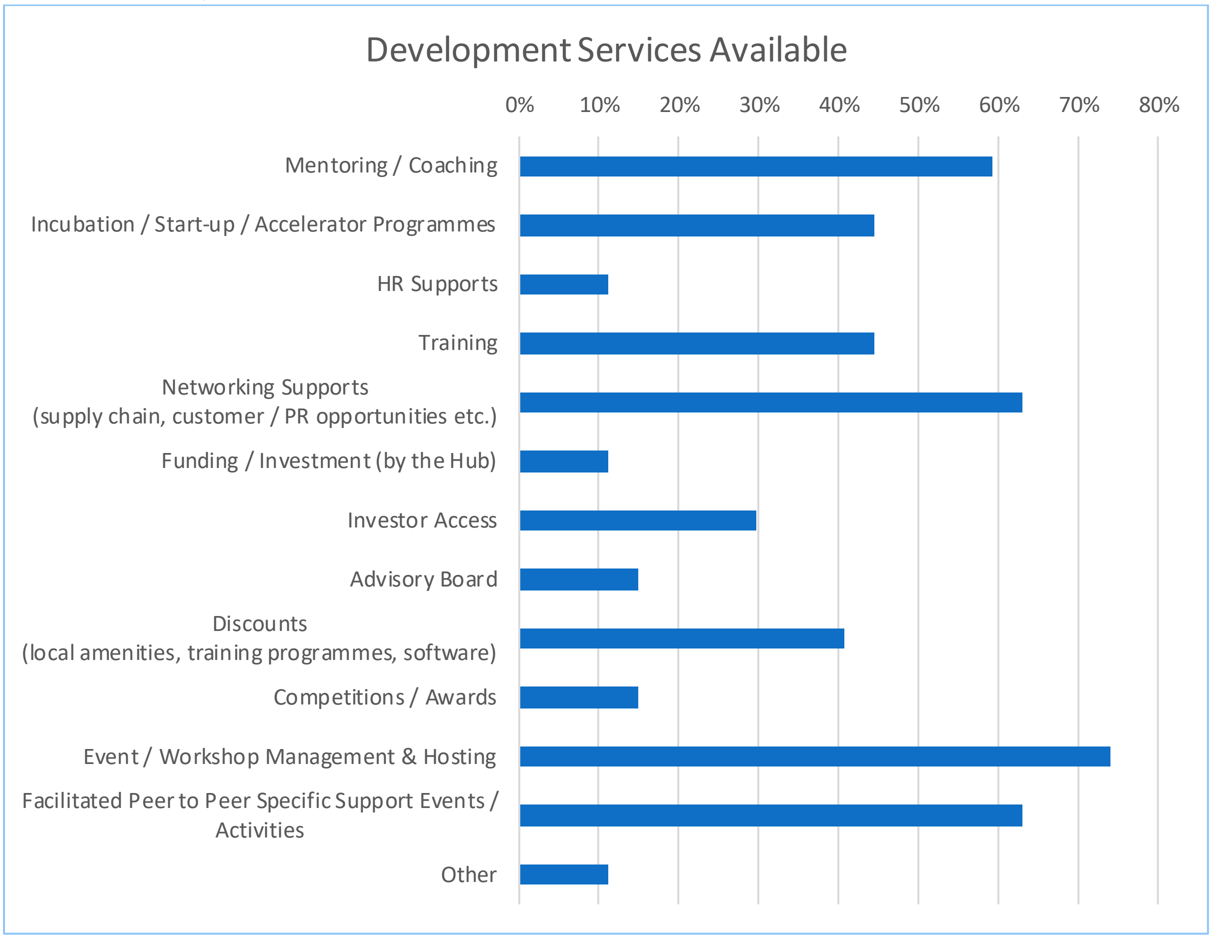

Figure 12 Development Services Available

Respondents' hubs provide a diverse range of development services to tenant enterprises / entrepreneurs. The majority provide Event / Workshop Management and Hosting followed by Facilitated Peer to Peer Specific Support Events / Activities, Networking Supports and Mentoring / Coaching. Among those that selected Other, some provided examples of additional services offered such as Accounting and Payroll, Community Events, Collaborations and Projects.

5.2.1.8 Allocation of Space

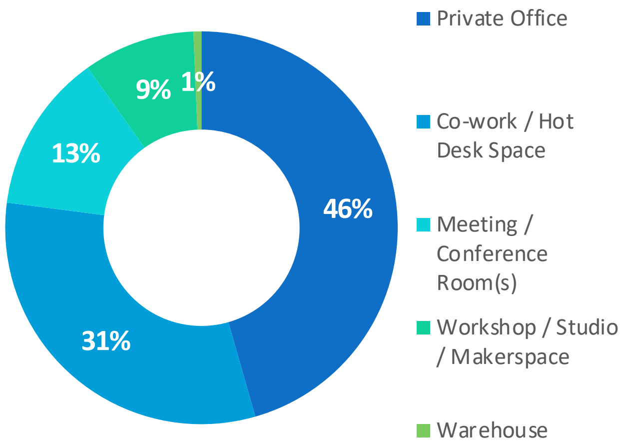

Figure 13 Allocation of Space

The most common allocation of space in hubs is Private Office, followed by Co-work / Hot Desk Space. Some respondents also allocate space for Meeting / Conference Room(s) and / or for Workshop / Studio / Makerspace. Very few allocate space for Warehouse use. A number of respondents selected Other and provided examples of alternative space allocations such as food production, green room / recording, community child care, entertainment.

5.2.1.9 Total Area of Rental Space

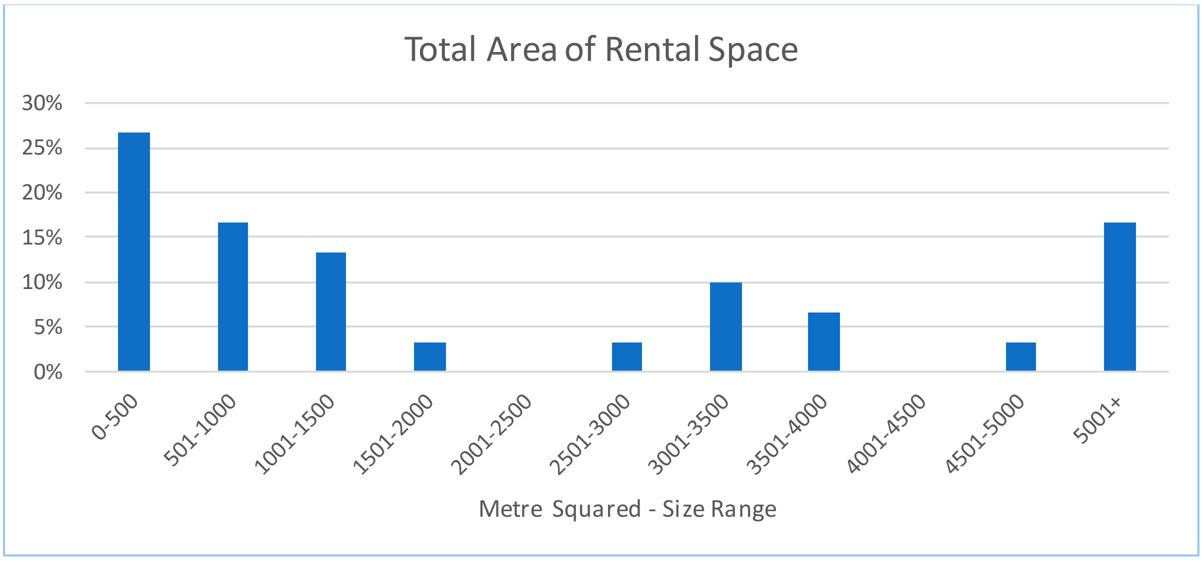

Figure 14 Total Area of Rental Space

The majority of respondents (57%) have a total area of rental space between 0-1500m2 in their hubs. A relatively small proportion (17%) provide large amounts of rental space, the largest being 20,000m2. Interestingly, the rental space that this small proportion of hubs provide accounts for the majority (59%) of rental space available within the overall sample of respondents.

5.2.1.10 Stages of Tenant Enterprises

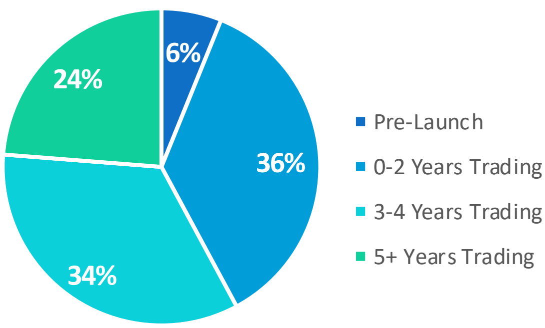

Figure 15 Stages of Tenant Enterprises

Within respondents' hubs, the most common stage that tenant enterprises are at is 0-2 years trading, closely followed by 3-4 years trading. These two stages combined, represent a vast majority and highlight how enterprise hubs are primarily catering for and supporting enterprises during the initial and vital years and stages of development.

5.2.1.11 Maximum Length of Tenancy

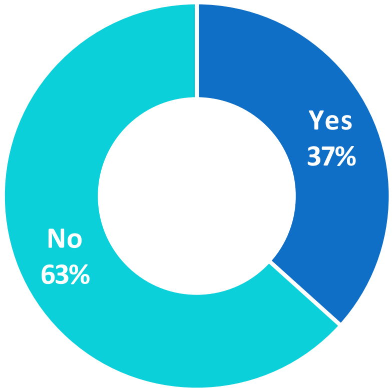

Figure 16 Maximum Length of Tenancy

The majority of respondents do not have a maximum length of tenancy in their hubs. Among those that do, the average max length is just over 3.5 years. Some respondents commented that the enforcement of the max length is dependent on various circumstances. One respondent explained that although their hub does not have a max length of tenancy, their pricing is structured in a way that encourages rapidly growing enterprises to move on. Some respondents have a formal tenant turnover policy that involves actively encouraging and assisting tenant enterprises to expand and move on. As part of their tenant turnover policies, some hubs: increase fees annually, conduct biannual target meetings with tenant enterprises, or outline an exit strategy with tenant enterprises when tenancies commence.

5.2.1.12 Metrics to Measure Performance / Success

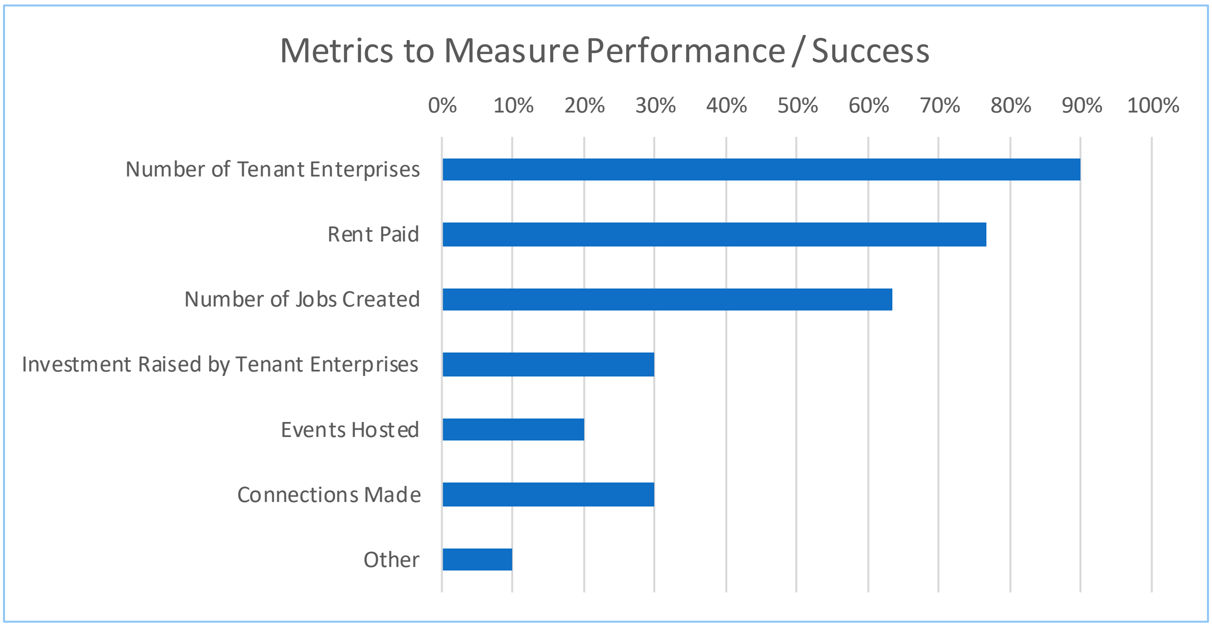

Figure 17 Metrics to Measure Performance / Success

The majority of hubs use the metrics: Number of Tenant Enterprises (i.e. individual businesses / organisations), Rent Paid and Number of Jobs Created to measure performance / success. Of those that selected Other, some respondents explained that they measure performance / success in regard to the 'demonstrable engagement with the university research and talent networks', [tenant] 'satisfaction feedback' and [tenant] 'participation, solidarity, support, inclusiveness, diversity'. One respondent explained that their hub measures performance / success in terms of 'the range of deliverable projects', both established and completed which typically focus on ‘addressing perennial problems such as housing, education, healthcare, generational, environmental / climate challenges that are developed via in hub collaborations and subsequently scale’.

5.2.1.13 How Hubs Engage in Innovation / Learning

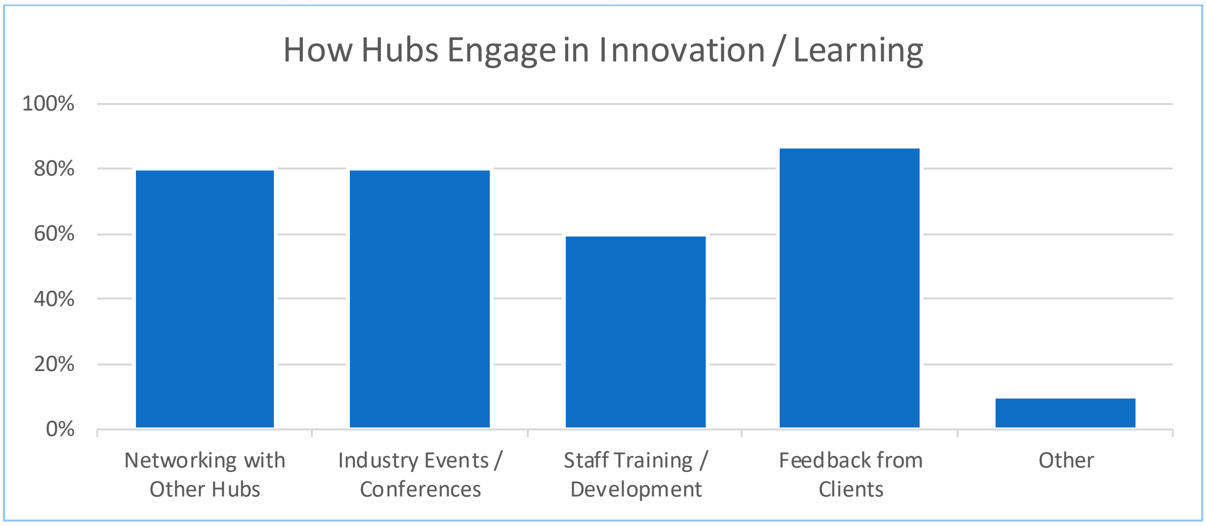

Figure 18 How Hubs Engage in Innovation / Learning

All respondents engage in one or more innovation / learning activities regarding their hub operations / management. Furthermore, the majority of respondents engage in all four innovation / learning activity types simultaneously. The most common activity is Feedback from Clients, followed closely and jointly by Networking with Other Hubs and Industry Events / Conferences. Some respondents also selected Other and provided examples of how they engage in innovation / learning, such as via: 'business coaching', 'entrepreneurial social enterprise approach', in-house / in-hub community brainstorming, collaborations and projects. One respondent explained how innovation / learning regarding their hub takes place in the context of their 'ultimate goal' and 'five point mandate - urban regeneration, community consolidation, creative collaboration, innovation in enterprise and experiential, experimental and explorative learning'.

5.2.1.14 Collaborative Arrangements / Initiatives with Other Organisations

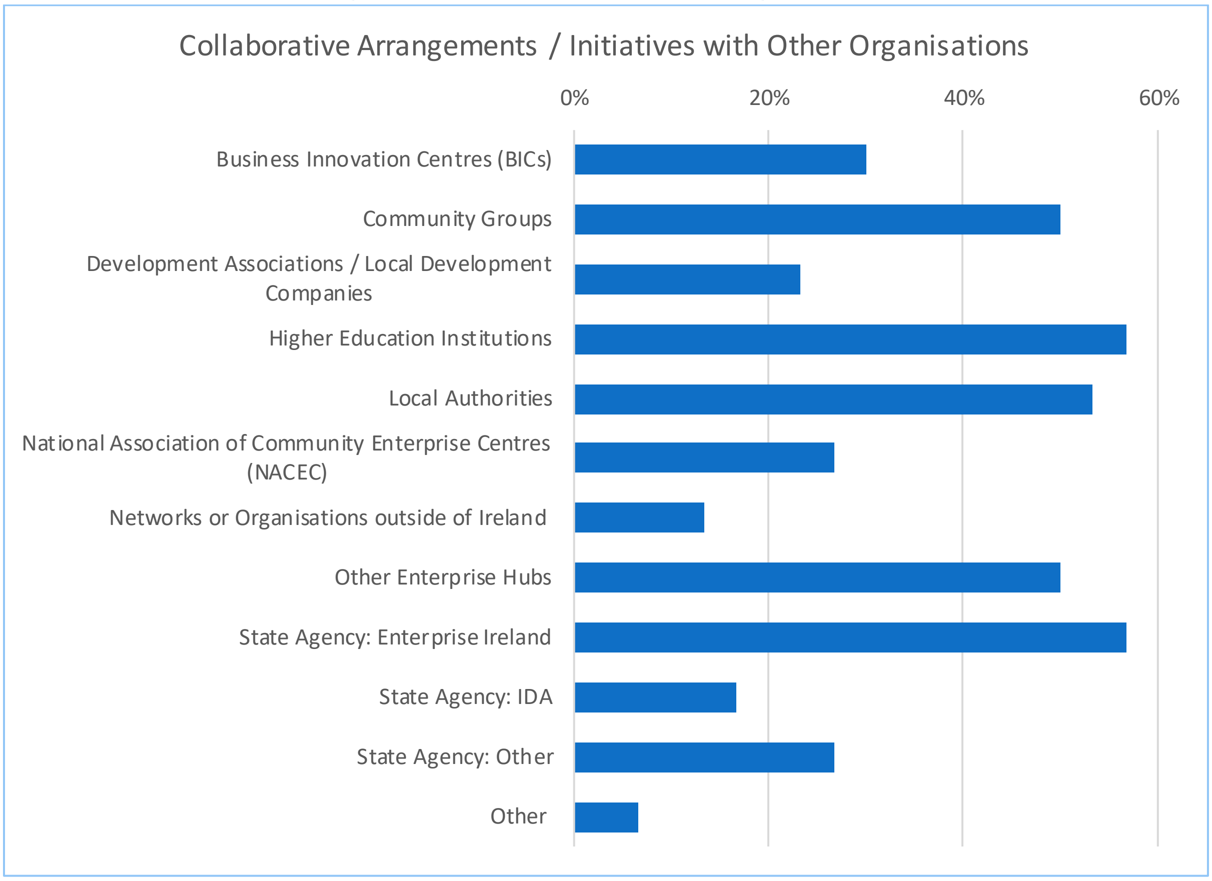

Figure 19 Collaborative Arrangements / Initiatives with Other Organisations

Among 90% of respondents, their hubs have collaborative arrangements / initiatives with other organisations. The majority of respondents have collaborative arrangements / initiatives with Higher Education Institutions, Enterprise Ireland and / or Local Authorities. Many have collaborative arrangements / initiatives with Community Groups and / or Other Enterprise Hubs. 10% of respondents stated that they did not have collaborative arrangements / initiatives with other organisations, however, one of these respondents also stated they 'keep in touch with other independent co-working spaces' and another stated 'we would like [to]'. Of those that selected Other, some respondents provided further details such as 'Google for Startups', Social Enterprise Development / Support Organisations, Local Business Networks, Local Chamber of Commerce, 'European funded project with 4 other countries'.

5.2.1.15 How Hubs Support Community Development

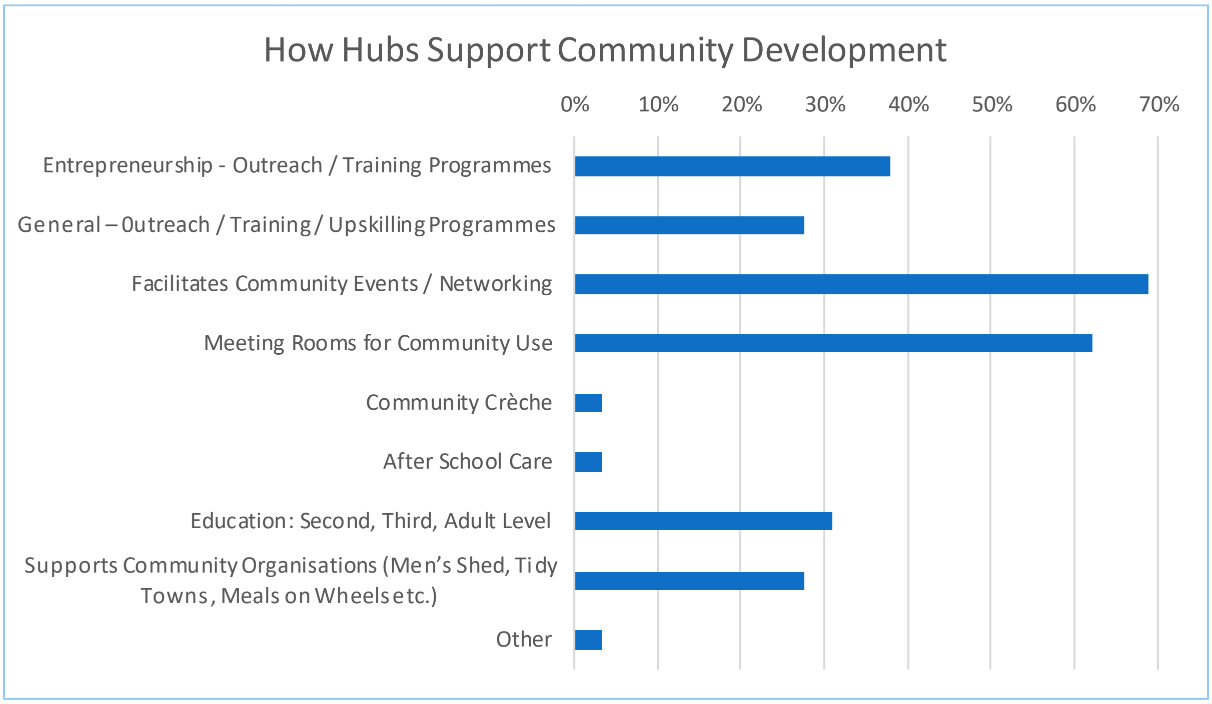

Figure 20 How Hubs Support Community Development

Almost 90% of respondents support community development in one or more ways. The majority of hubs support community development through facilitating Community Events / Networking and providing Meeting Rooms for Community Use. Many hubs provide Entrepreneurship - Outreach / Training Programmes, Education at Second, Third or Adult Level, General - Outreach / Training / Upskilling Programmes and / or Support for Community Organisations. Of those that selected Other, one respondent noted that their hub supports community development through offering scholarships.

5.2.2 Findings and Analysis (COVID-19 Impact, Supports Needed and Plans)

5.2.2.1 Amount of Hub Employees

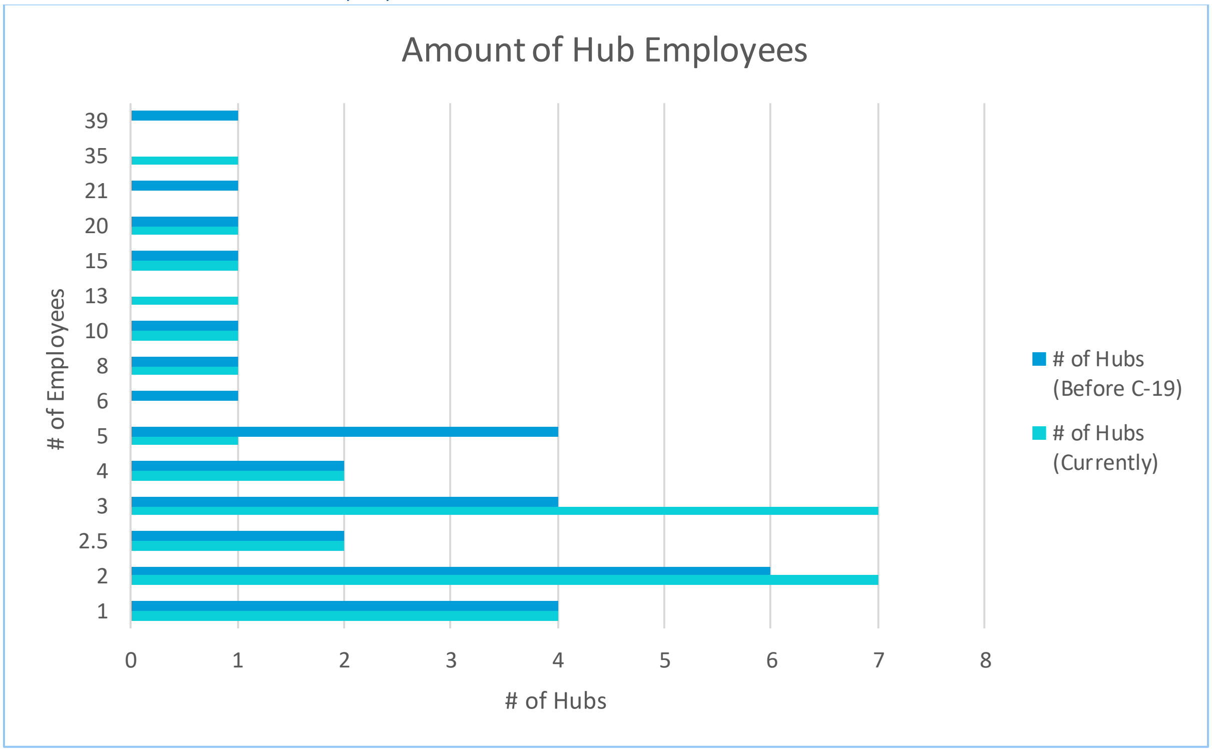

Figure 21 Amount of Hub Employees

The total number of people directly employed to manage / operate all of respondents' hubs combined is currently 158 compared to 180 before COVID-19 which represents a 12% decrease. The majority of hubs employ between 1-3 people, which was the case before COVID-19 and is still currently. However, this majority has increased from 55% of hubs before C-19 to 69% currently as more hubs now employ between 1-3 people.

5.2.2.2 Amount of Tenant Enterprises Located in Hubs

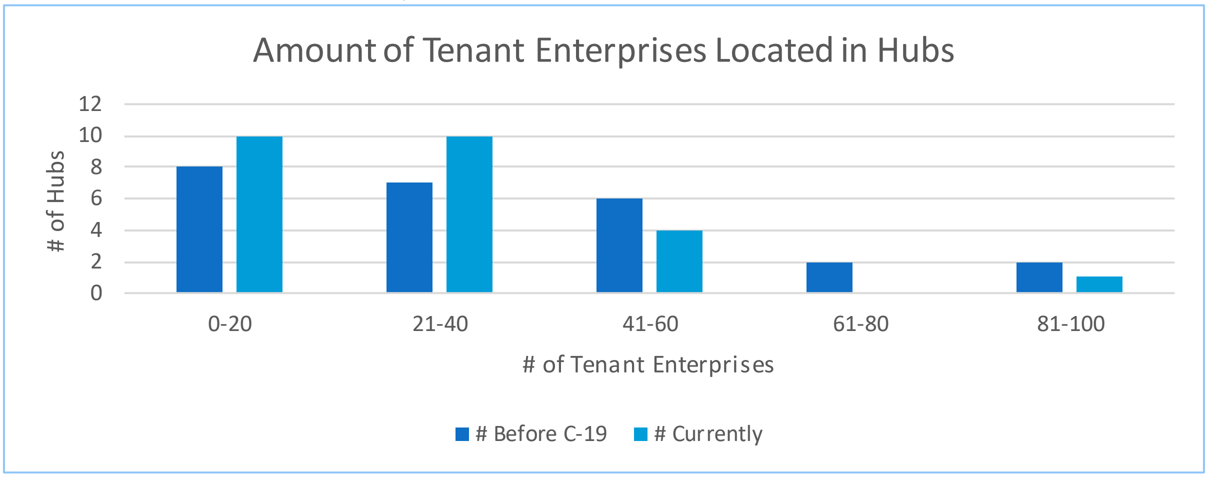

Figure 22 Amount of Tenant Enterprises Located in Hubs

Among respondents, the vast majority (76%) saw a decrease in the number of tenant enterprises located in their hubs. Overall, the number of enterprises located in respondents' hubs combined, decreased by 28%, from 930 to 666. In Figure 22, hubs have been grouped in relevant ranges regarding the number of enterprises located in them. The majority of hubs host between 0-20 / 21-40 enterprises. This majority has increased since before C-19, as there are now more hubs hosting in this range. Conversely, the amount of hubs that hosted larger numbers of enterprises (41+) before C-19 has decreased.

5.2.2.3 Amount of People Located in Hubs

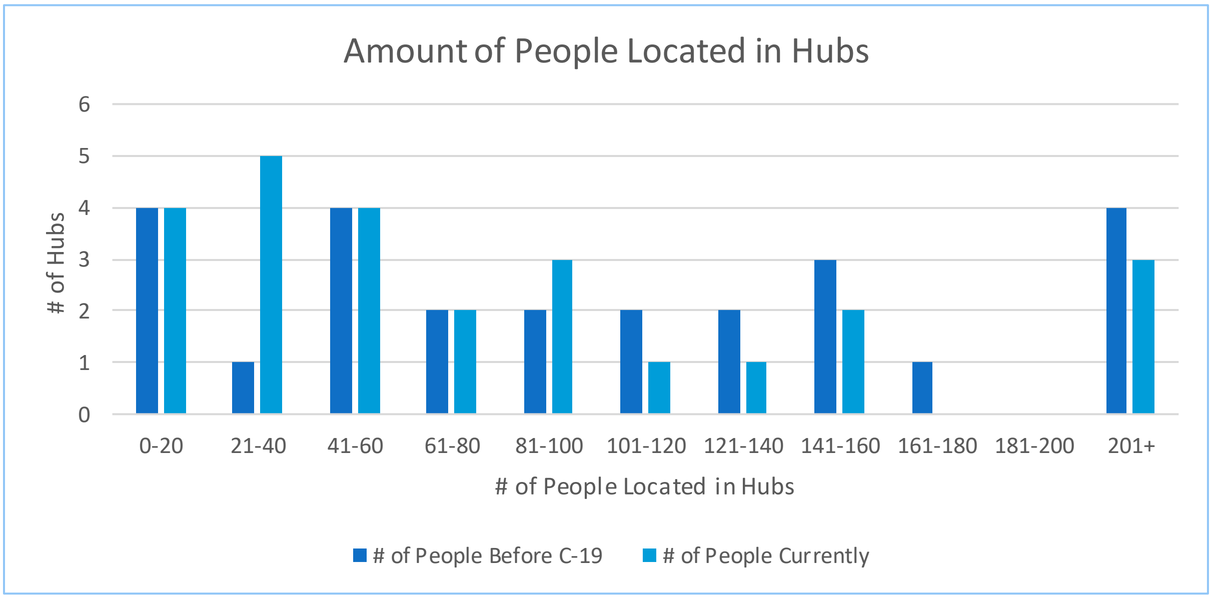

Figure 23 Amount of People Located in Hubs

Across all respondents, the amount of people (i.e. tenant enterprise employees / individuals) located in their hubs decreased. The total amount of people located in all the respondents' hubs combined, decreased from 3,649 (Before C-19) to 2,165 (Currently) representing a 41% decrease. In Figure 23 Amount of People Located in HubsFigure 23, hubs have been grouped in relevant ranges regarding the number of people located in them. Before COVID-19, a slight majority (52% / 13) of hubs hosted between 0-100 people. This majority has increased (72% / 18) as more hubs now host in this range. Conversely, the amount of hubs that hosted larger numbers of people (100+) before C-19 has decreased with some of these hubs seeing the most significant decreases of people located in them from approximately 500-250 and 800-300 respectively.

5.2.2.4 Amount of People That can be Located in Hubs

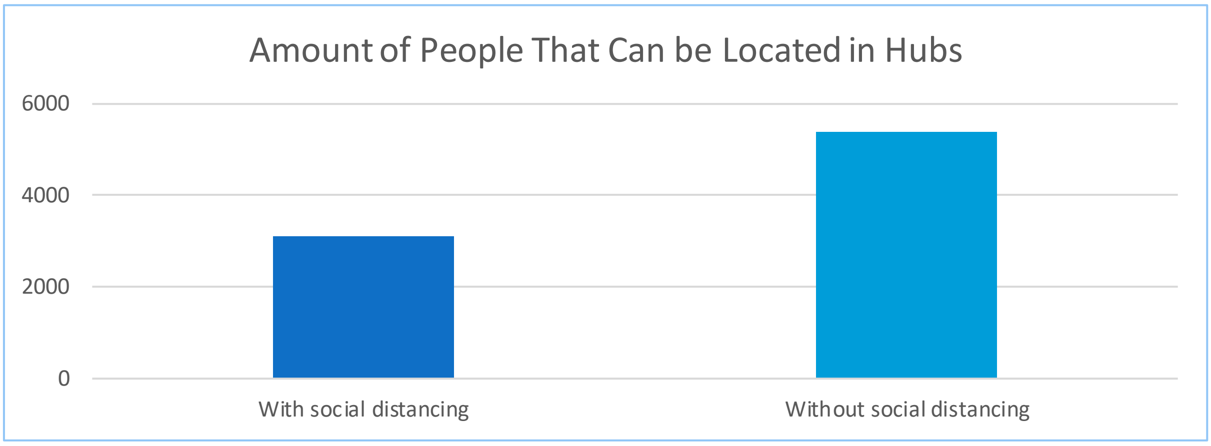

Figure 24 Amount of People That can be Located in Hubs

Within all of the respondents' hubs combined, the max amount of people that can be located is almost 5,400 without social distancing measures in place while just over 3,100 people can be located with social distancing measures in place. On account of social distancing measures, there is a 42% decrease in overall capacity among respondents' hubs. The average % decrease in capacity among respondents is 33%.

5.2.2.5 How the COVID-19 Crisis Impacted Hubs

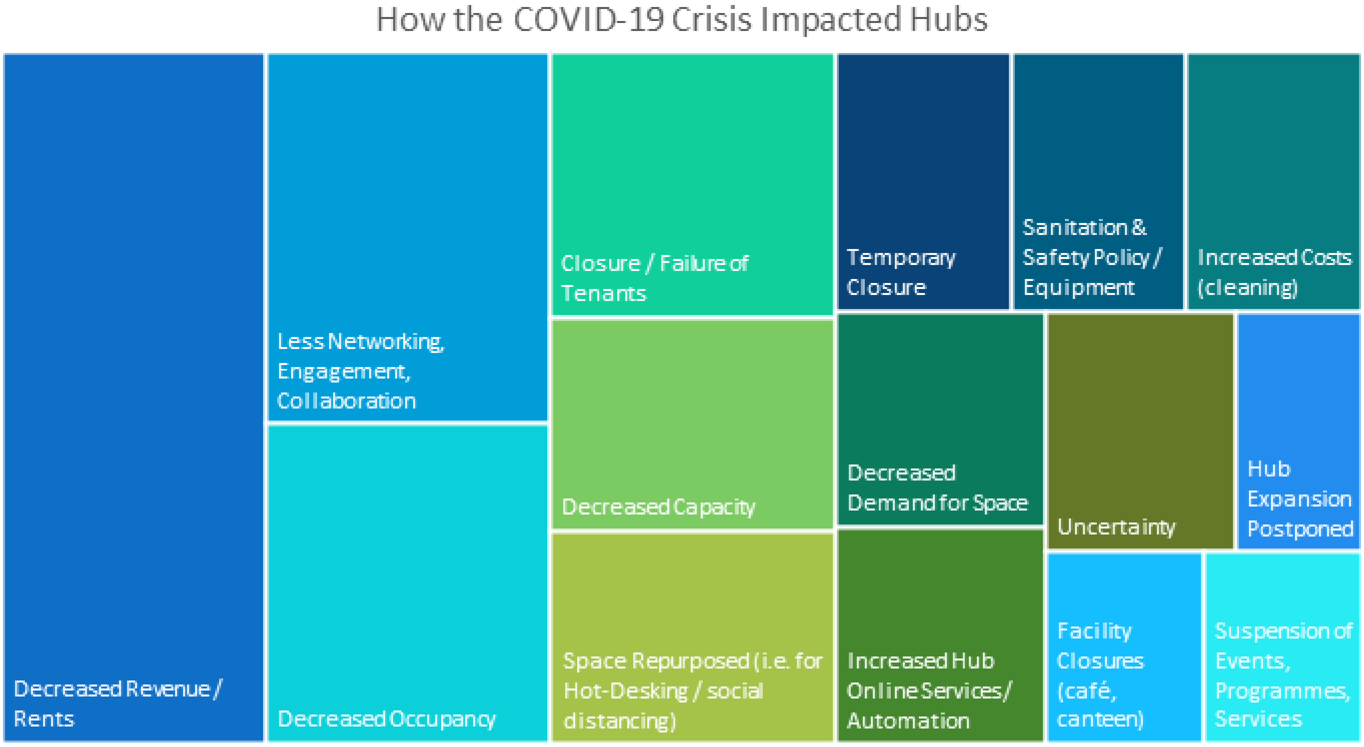

Figure 25 How the COVID-19 Crisis Impacted Hubs

Respondents provided many important insights and examples of how the COVID-19 crisis has impacted their hubs. The insights and examples were summarised and grouped under relevant categories regarding their prevalence. As seen in Figure 25, the most common impact was Decreased Revenue / Rents. In relation to this impact, respondents stated 'tenants are unable to pay rent', 'we have lost significant income due to an almost 50% decrease in occupancy', 'all our room hire / training stopped, [which] again had a big impact on income'. Many respondents highlighted how their engagement with tenants was greatly reduced, as was general networking and collaboration. These respondents noted the 'lack of people in the building', the loss of 'community buzz... due to lack of members' and the 'reduction in peer to peer networking opportunities'. One respondent stated that 'innovation is a contact sport' and detailed how past successful initiatives within their hub were borne out of multidisciplinary collaboration among members and stakeholders, which 'cannot happen... without physical presence in the hub'. Various respondents highlighted the sharp decrease in occupancy with many stating their occupancy levels had decreased by 50%. In addition, various respondents highlighted the forced closure or failure of tenant enterprises and their decreased hub capacity due to social distancing requirements. Some other pertinent and detailed insights from respondents are noted below: 'we have had minimal interest during lock down', 'companies have questioned the need for offices at all', 'the uncertainty for the last year and a half and Government health restrictions have kept start-ups away from our hub', 'I had to work more hours every day in order to keep my users and myself protected from COVID', 'Each lockdown we have had to re-invent ourselves again'. It is clear that hubs have been impacted significantly and also simultaneously as multiple challenges converged, such as costs increasing while demand, capacity and revenue decreased. Although the overall sentiment among respondents is certainly negative, it is important to note some positive impacts also shared, such as enhanced online services and automation within hubs, tenants in some hubs successfully pivoted and developed by catering to new trends, and a strong solidarity or hub community 'spirit' developed among members in some hubs.

5.2.2.6 How the COVID-19 Crisis Impacted Tenant Enterprises

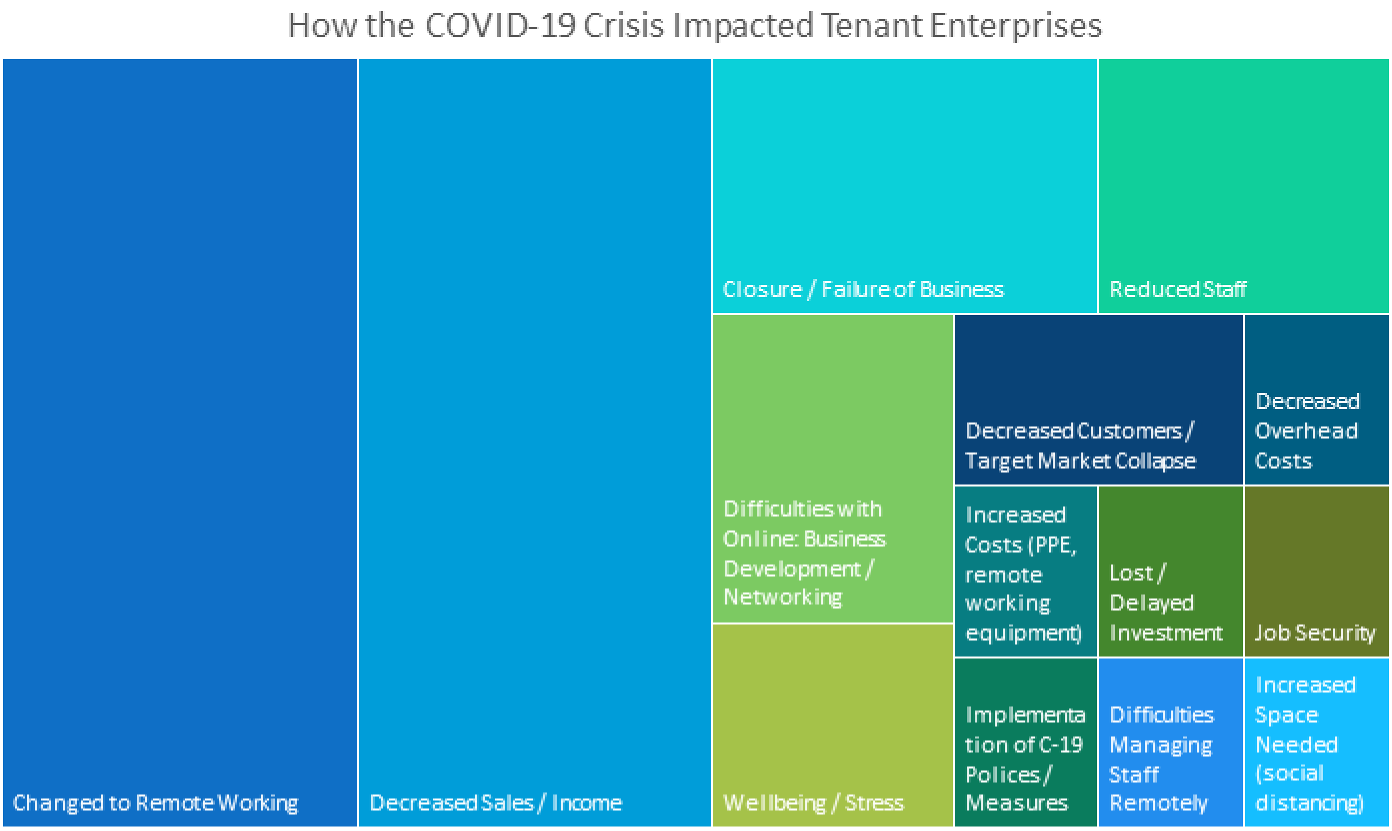

Figure 26 How the COVID-19 Crisis Impacted Tenant Enterprises

The main ways that tenant enterprises and their employees within respondents' hubs have been impacted by the COVID-19 crisis are summarised and grouped in Figure 26. The 2 most common impacts were Changed to Remote Working and Decreased Sales / Income. Various respondents explained that 'nearly all our client companies have the majority of their staff and teams working remotely', 'people worked from home unless they had to attend the office', 'they are nervous to come back but slowly some are now, as working from home full-time isn't for everyone'. Another respondent stated 'all have adapted to remote working, and this has encouraged the use of internationally based staff'. In regard to Decreased Sales / Income, respondents explained that '50% of tenants [were impacted] due to loss of trading income', 'smaller businesses lost a lot of clients and revenue' and 'about 30% of tenants saw all their income disappear over-night'. Some respondents also highlighted the failure or forced closure of tenants and stated 'some businesses stopped completely' and 'some businesses have ceased trading and left'. Other notable impacts include Difficulties with Online Business Development / Networking, Reduced Staff and Well being / Stress. Some other insights provided by respondents are noted below: 'tenants want smaller offices, with increased use of meeting spaces as required', 'requirements to work from home has impacted business operations and required new structures and reporting processes'. Although the vast majority of impacts are negative, some respondents also stated positive or neutral impacts such as 'reduced office accommodation and overhead costs', 'initially work dried up for many of the businesses but this has returned', 'some companies have been particularly impacted, [while others have] been quite robust, in some cases growing rapidly through COVID-19', 'some ceased trading altogether during the pandemic, others stopped for the main part of it, while some pivoted and used it to their advantage'. One respondent explained that their hub implemented various supports for tenants which has meant 'we are all (pretty much 100%) still operating and still very much connected'.

5.2.2.7 Supports, Services, Facilities Provided by Hubs in Response to COVID-19

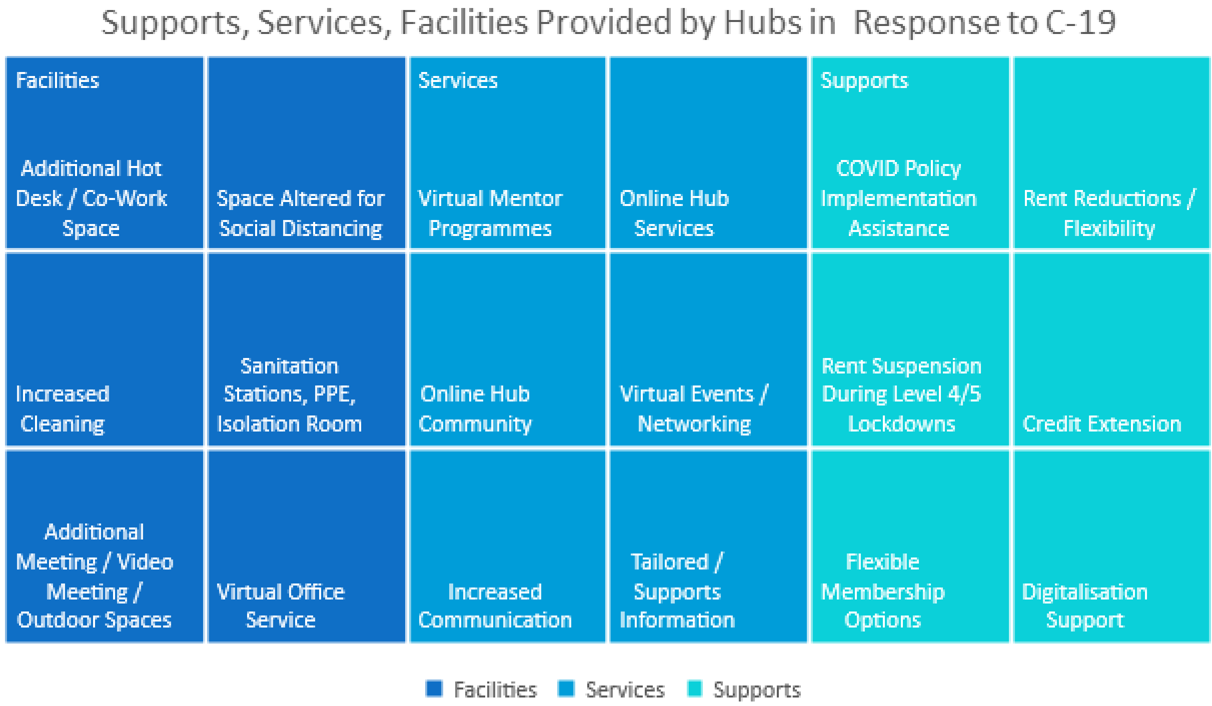

Figure 27 Supports, Services, Facilities Provided by Hubs in Response to C-19

The vast majority (89%) of hubs provided new or adapted supports, services, facilities in response to COVID-19. Examples are summarised in Figure 27 under the 3 relevant categories. Typically, the hubs provided a mixture of supports, services, facilities to assist their tenants. The most common measures or initiatives were sanitation related under facilities, virtual offerings under services and rent assistance under supports.

Some pertinent comments are included below which highlight the significant efforts made by respondents and their hubs to support tenant enterprises: 'We provided flexibility on leases, rent reductions, rent holidays and the use of deposits to cover rents. We also enabled returning companies to have their rent suspended while government Level 4 or 5 restrictions were in place', 'We consistently provided tailored lists of supports (Govt. and others) to our tenants, increased our communications with them, extended credit and write-offs, adjusted our business operations rules around deliveries and collections and day to day operations of the centre', 'We transported our community to a virtual online community and helped some of our members adapt to a new hybrid working model by creating bespoke product offers. We also supported members to find the right connection to assist with digital transformation', 'We set up a new virtual office service for the businesses who were forced to leave us. We added more hot desks and another co-working space. We provided video call space for business members. We also upgraded all offices that became vacant during the pandemic. We added a new hot desk booking and payment page to our website'.

5.2.2.8 Government / Other Supports Received by Hubs in Response to COVID-19

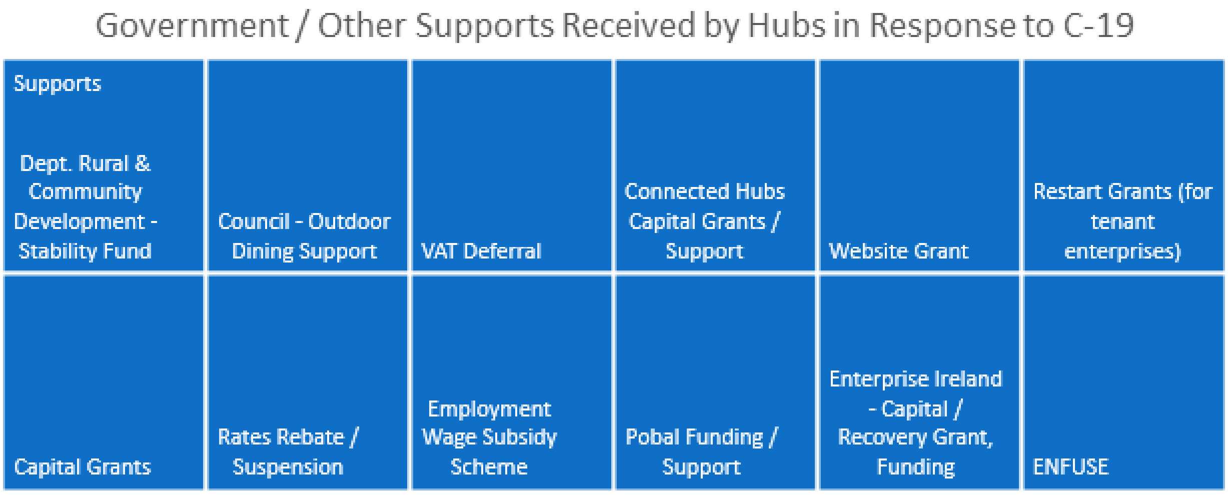

Figure 28 Government / Other Supports Received by Hubs in Response to C-19

The majority (70%) of respondents received / availed of government or other supports in response to COVID-19. Examples of supports received / availed of are highlighted in Figure 28. Common among respondents was funding or grants received from Enterprise Ireland, for example as part of the Powering the Regions[33] initiative or Enterprise Centre funding. Various respondents availed of the Employment Wage Subsidy Scheme[34] or a Rates Rebate / Suspension. Other notable examples of supports received include: Council - Outdoor Dining Support, Website Grant and participation in the ENFUSE[35] programme.

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33 Enterprise Ireland: Powering the Regions – Enterprise Centre Scheme
34 Revenue: Employment Wage Subsidy Scheme (EWSS)
35 Dublin City Council / LEO Dublin City: ENFUSE

5.2.2.9 Challenges for Hubs in the Recovery

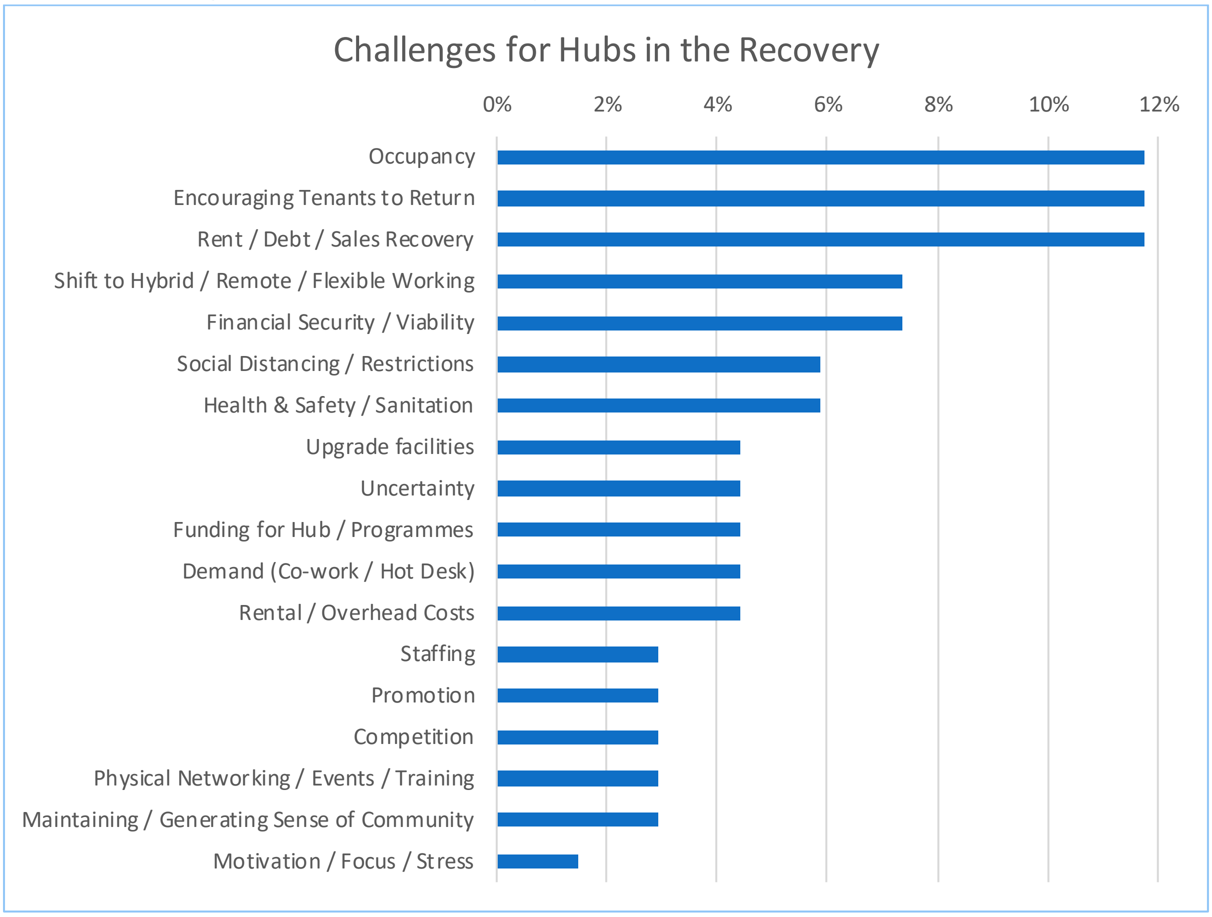

Figure 29 Challenges for Hubs in the Recovery

Various challenges were highlighted by respondents regarding their hubs and the economic recovery after COVID-19. Challenges were summarised and grouped as seen in Figure 29. The 3 most common challenges were Rent / Debt / Sales Recovery, Encouraging Tenants to Return and Occupancy. Many respondents also cited Financial Security / Viability and Shift to Hybrid / Remote / Flexible Working as key challenges.

Some pertinent and more detailed insights from respondents include: 'we are planning an expansion and development project somewhat in the dark - what market are we building for', 'we are seeing a struggle in encouraging people to work in open plan which pre-COVID was one of our most popular products', 'engaging our online community as people are no longer as interested in online events', 'continued economic growth so that more start-ups are created and can grow', 'will there be a long term shift towards home (or local hub) working rather than main office & what will employers obligations be in this regard?', 'keeping us all from burning out, keeping us all positive, healthy, safe, focussed and motivated'.

5.2.2.10 Interventions / Supports Needed to Assist Hubs

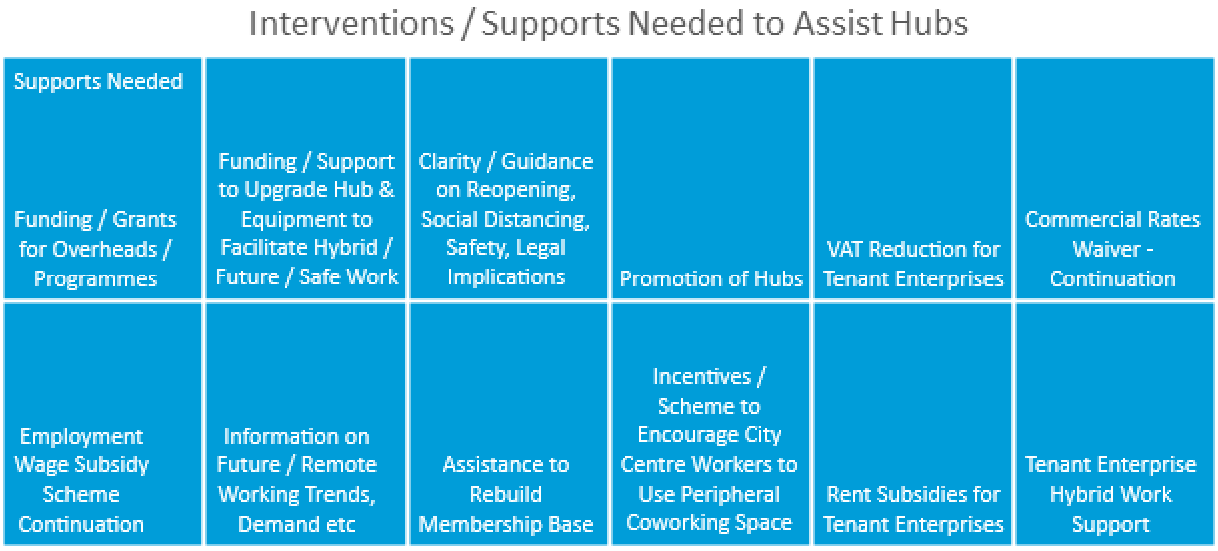

Figure 30 Interventions / Supports Needed to Assist Hubs

Respondents provided various examples of interventions / supports needed to assist their hubs currently and in the recovery. Common suggestions among respondents were: funding towards upgrading hubs and equipment, support and subsidies for tenant enterprises, clarity regarding reopening and promotion of hubs. Some respondents noted the need for support to adapt their hubs and hub infrastructure to the 'new working style' and to hybrid demands.

Detailed examples of supports needed and relevant insights provided by respondents include: 'subsidies for tenants' rent to encourage small businesses and social enterprises to rent again at an affordable rate', perhaps the councils / government departments could rent space for clients / employees, 'a scheme to incentivise city centre workers / employers to use 'peripheral' co-working space (M50 ring) would help avoid carmageddon when everyone returns to work in the CBD, in socially isolated private cars', 'clarity on back to work guidance... workplace distancing, air quality obligations etc. Clarity on any legal implications of restricting access or accommodating unvaccinated persons in the workplace', 'guidance and data... around future ways of working, remote working trends, demands etc', funding / support for 'a programme budget to offer training etc. to our business members... would also help us to attract more businesses', 'with the increased workload brought on by COVID, I would love support to employ someone and therefore free myself to work on business development'.

5.2.2.11 Interventions & Supports Needed to Assist Tenant Enterprises

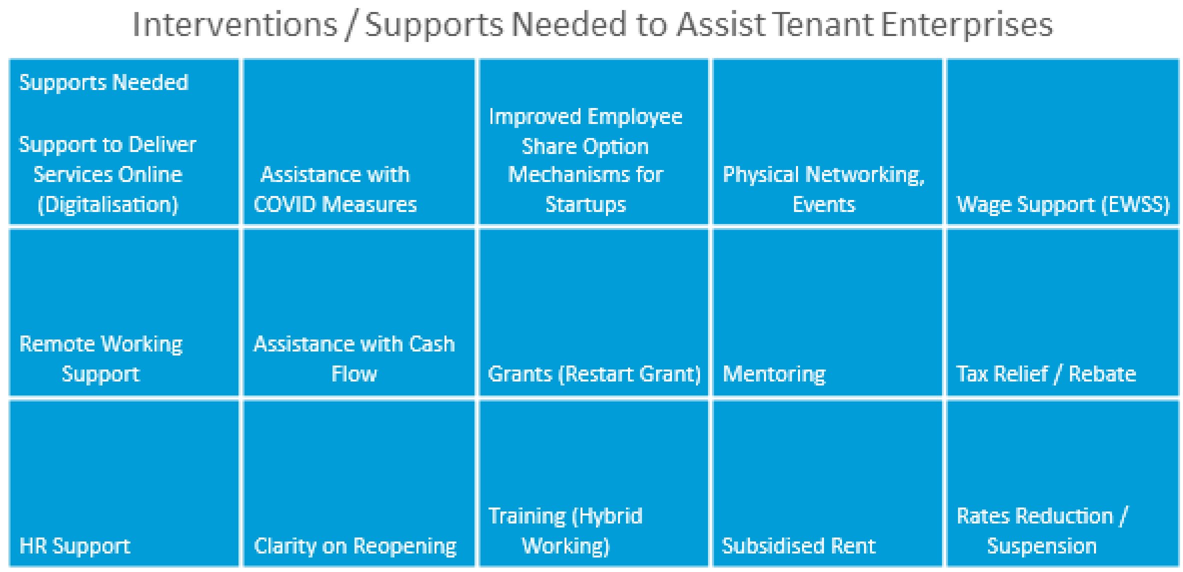

Figure 31 Interventions / Supports Needed to Assist Tenant Enterprises

Examples of interventions / supports needed to assist tenant enterprises currently and in the recovery are summarised above. Common examples provided by respondents include: grants, training, tax / rates reduction, subsidised rent and mentoring. Detailed examples and insights include: 'continuance of rates deferrals not strictly related to income / lost income', 'they need in person networking, events and pitching to begin again', 'perhaps a tax rebate for monies spent on rented accommodation for work-from-home employees', 'by supporting the commercial viability of the co working space and our ability to provide cheap office space, you support the tenants'.

5.2.2.12 Plans Within the Next 3 Years

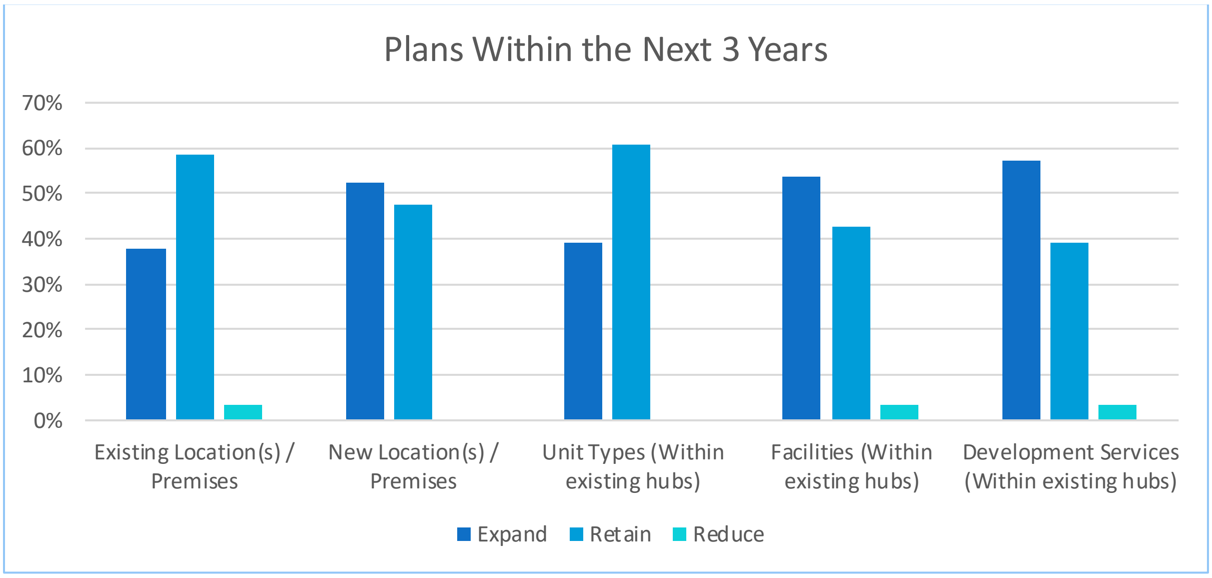

Figure 32 Plans Within the Next 3 Years

The vast majority of respondents plan to either expand or retain their operations within the next 3 years. A slight majority plan to expand New Locations / Premises, Facilities (within existing hubs) and Development Services (within existing hubs). Some respondents provided examples of their plans which include: 1,500 sqm. expansion, 'more hot-desking options and meeting room booking flexibility, 24.7 office access', 'We have secured funding to expand our business canteen space. We wish to provide new training and development opportunities for our business members. We are also considering developing a new recording studio for video, podcasts etc.', 'more emphasis on food production and local artisanship and more co-working spaces', 'Digital Suite, Extra Food Units', 'Expand some of our services in social innovation to local community'.

Overall, the plans of respondents within the next 3 years signal both commitment to and confidence in the enterprise hub sector into the future. This is especially important, considering the significant impact that COVID-19 has had on hubs and their tenant enterprises.