



Oifig Fiontair Áitiúil
Local Enterprise Office

South East Remote Working Study

Harnessing
Remote Working
Opportunities in
the South East



Kilkenny County Council
Comhairle Chontae Chill Chainnigh



Comhairle Contae Thiobraid Árann
Tipperary County Council





2 hours more sunshine per day



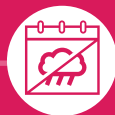
40% more disposable income



€240 monthly savings on childcare



65% better value housing



75 less rainfall days than other regions



95% movers say work/life balance improved



1.5 hours to Dublin



#1 region for remote working hubs



INTRODUCTION

The South East Remote Working Study has been conducted collectively by the five local authorities in the South East of Ireland supported by the LEO competitive fund and the Ireland South East Development Office and co-ordinated by Carlow County Council.



Kathleen Holohan
Chief Executive,
Carlow County Council
www.carlow.ie

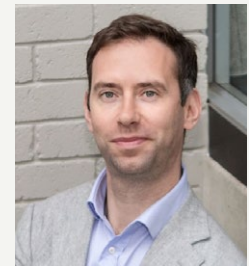
The motivation for the South East Remote Work study was to identify a cohort of potential start-up businesses and to understand remote work habits and behaviours in the South East on a regional and individual county level so that as a collective region we can work together to support economic opportunity. 900 individuals participated in the research which was conducted over 4 months.

Most businesses, individuals and households have been affected significantly by a change of working conditions since the confirmation of the first case of Covid-19 on Feb 29th, 2020 which was followed by a government announcement on March 12th introducing the first shut down measures to curb the spread of the virus. This research investigates what effects this emergency has had on remote working patterns in the South East and how these behaviours are expected to influence future work patterns to the end of the pandemic and beyond.

It identifies opportunities for the South East and presents its key recommendations which include:

- › The South East has an opportunity to be a hub for new innovative start-up supports for the new remote workers community as over 30% of respondents are interested in starting or developing their own business.
- › The South East has an opportunity to work with the current hubs in the various strategic locations and also develop new solutions for remote working and enterprise development.
- › The development of hybrid working models will accelerate the achievement of the green agenda for the South East with the potential for significantly less people commuting than in the pre-Covid Era.

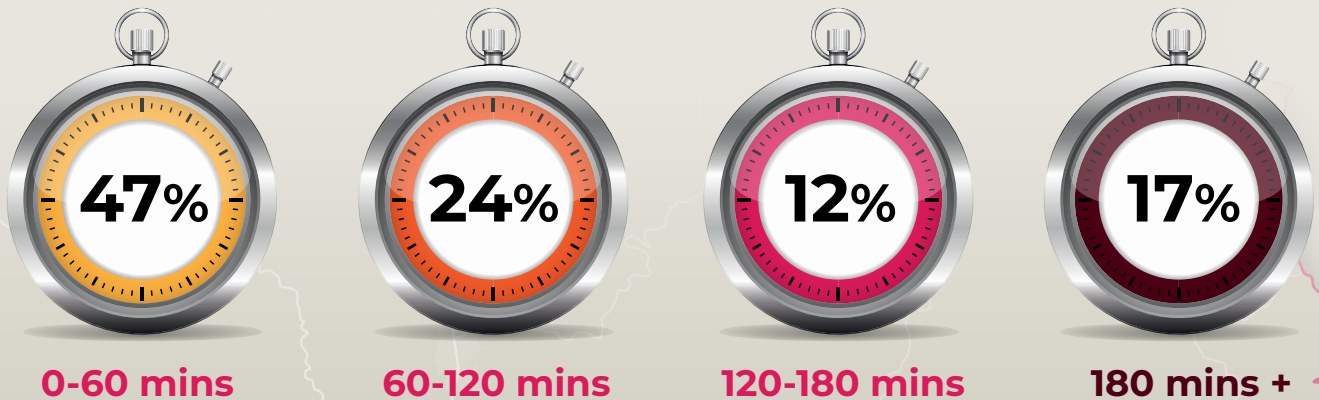
All of these goals align with 'Our Rural Future' - *Rural Development Policy 2021-2025* published by the Department of Rural and Community Development in March 2021, and we look forward to working towards these goals to the benefit of all remote workers in the South East.



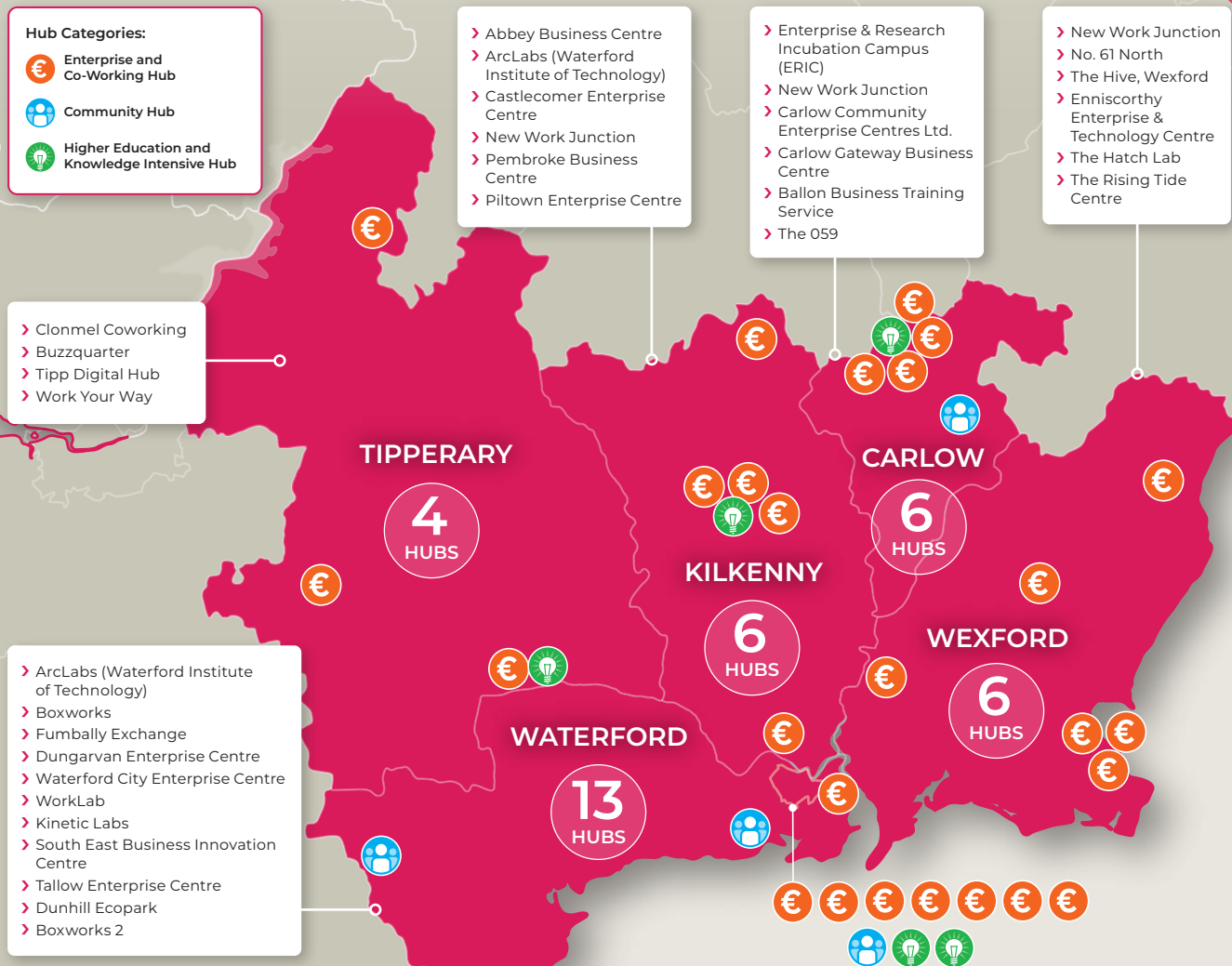
Alan Quirke
Director Ireland South East
Development Office
irelandsoutheast.com



Time saved by remote working in the South East Region (return journey)



Hubs locations in the South East Region



EXECUTIVE SUMMARY



By building on the insight gained from this study there is undoubtedly a huge advantage to be gained in leveraging current remote working opportunities for both employees and employers post Covid-19 that will bring renewed vitality to the South East region.

The key findings from 904 remote workers based in the South East surveyed are:

› Time savings of remote working are hugely significant: 3 out of 4 remote workers surveyed in the South East saving at least an hour a day, and 24% saving at least 3 hours a day

› 2/3rds will have a hybrid working model post pandemic

› 1 in 3 don't plan on returning to the office before year end

› 1 in 4 remote workers work for Multinational companies

› 37% would consider starting their own company

› 60% would use a hub if a good one was nearby

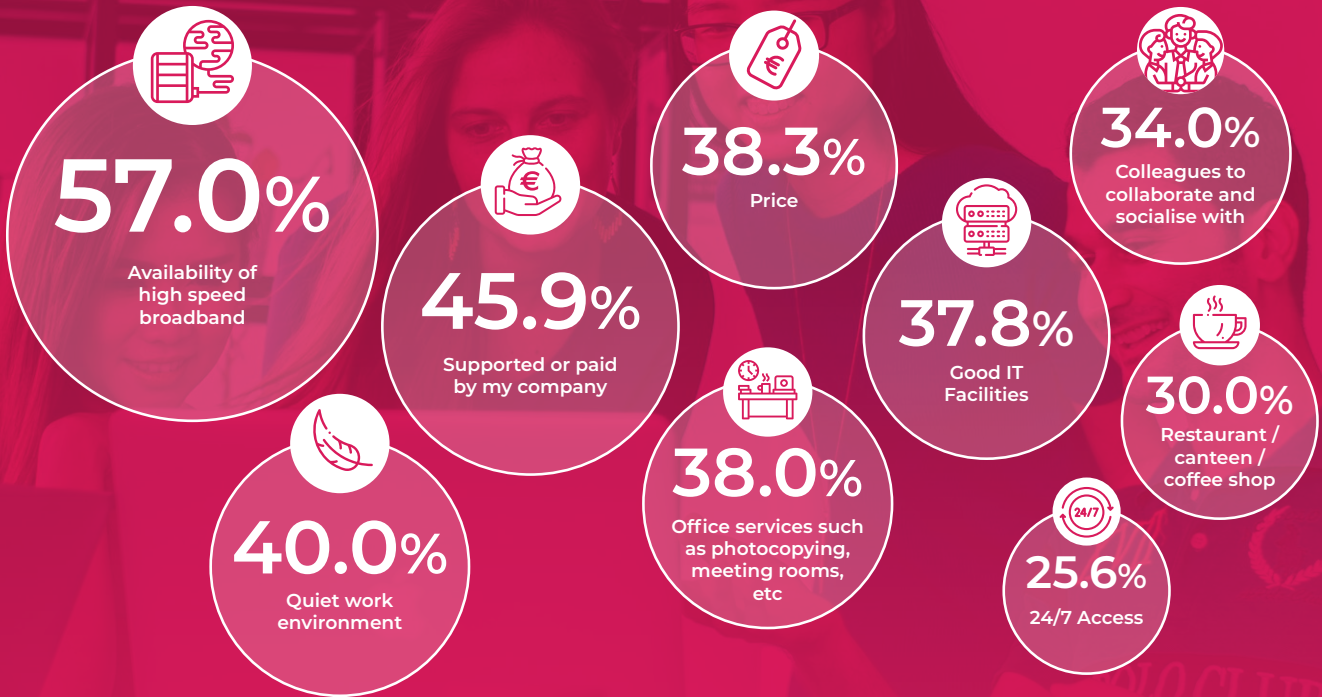
› Of those who responded to the question on price of hub (half didn't or said company should pay): The average indicated price per day was €14

› There was a high lack of awareness/availability of hub locations with 2 out of 3 people unaware of a hub in their locality

› These remote workers are highly educated with 35% at PhD, Masters or Post-Graduate level



Motivation factors for working in a hub



This research indicates the following key opportunities for consideration by the Ireland South East Development Office and the South East Local Authority network:

- › Start-Up supports for remote workers
- › Increase availability of hubs, and promotion of their services
- › Opportunity for the Green Economy
- › Hub Payment Support
- › Economic and rural development plans for cities, towns and villages

Re-imagining the future of work is essential to capitalise on these opportunities and in tandem leverage the benefits of work life balance that the South East region can provide through its rural and coastal amenities, low cost of housing and childcare, strong transport infrastructure, educational institutions, world leading status in sectors such as ICT, Financial Services, Engineering, Agri and Life Sciences and the creative sectors, as well as strong city, town and village communities.

Almost 40% of remote workers in the South East would consider starting their own business



In this re-imagining there are several recommendations that have become evident during the research of this study:

- › The Local Enterprise Office and the Ireland South East Development Office will provide remote working start-up supports for new businesses using hubs.
- › There is a clear opportunity for the SE region to become a hub eco-system exemplar through the strategic development of new hubs utilising re-purposed buildings, as well as supporting existing hub development relevant to talent location and demand.
- › Develop a green economy hub standard for the South East that includes key sustainability targets with stretch targets reported annually.
- › Hubs and the development of a hub-ecosystem exemplar should be embedded in all economic and rural development plans, with the aim of re-balancing the urban / rural location of remote workers, driving vitality in cities, towns and villages and contributing significantly to the local economy.
- › Investigate the feasibility of subsidised hubs to reduce the cost of usage for remote workers. Consider the viability of extending a Local Enterprise Office Desk sponsorship scheme to support high potential start-ups.
- › Government policy and legislation to promote employee and employer safe and effective work policies including access to high speed broadband, employee wellness and inclusion, the right to disconnect, and appropriate taxation policies for employees, employers and hub owners should be evaluated within the context of promoting remote working.

All of these aims are aligned to national policy, including 'Our Rural Future - Rural Development Policy 2021-2025', and we look forward to engaging with stakeholders to progress these opportunities in the South East in line with that government policy.



METHODOLOGY AND SURVEY RESULTS

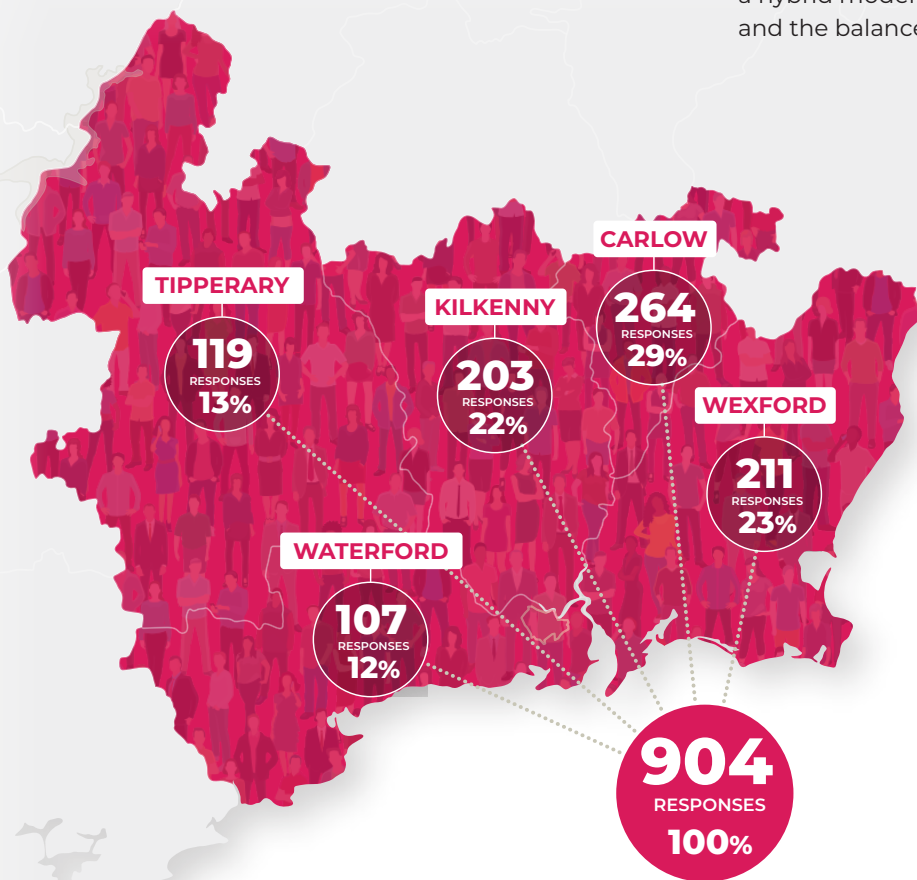
METHODOLOGY

The research was conducted through an incentivised online survey, via Survey Monkey, over the course of four months from Oct 2020 to Feb 2021, and 904 completed responses were received by remote workers based in the South East of the country. This research was supplemented with interviews with hub owners/managers offering successful remote working in the South East, remote working individuals using hubs, and companies successful in implementing remote working strategies for their employees.

SURVEY RESULTS

904 completed responses were received from remote workers in the South East – breakdown of numbers below:

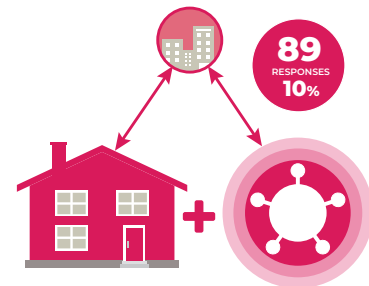
Of these 904 remote workers 24% of them were part time workers, and 75% worked full time remotely. Just under 1% of these respondents worked fully remote from a hub, almost 10% were working remotely under a hybrid model of combined home and hub working and the balance, 89% worked fully from home.



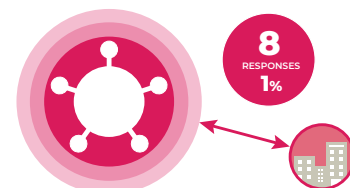
Fully Remote (Residential Location)



Hybrid (Residential & Hub Based)

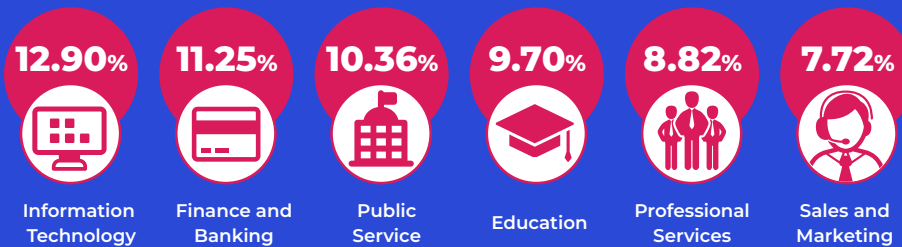


Fully Remote (Working from Hub)





60% of respondents came from the 6 sectors detailed here, ranked in order of popularity:



3 out of 4 remote workers surveyed in the South East are saving at least an hour a day, and 24% are saving at least 3 hours a day by remote working.

Limited Companies represented 27% of employers, Multinational companies represented 25% and public bodies accounted for 22% of responders' employers. The responses indicated a high level of education among responders, with 40% at graduate level, and a further 35% at PhD/Masters/Post Graduate Diploma level in the South East.

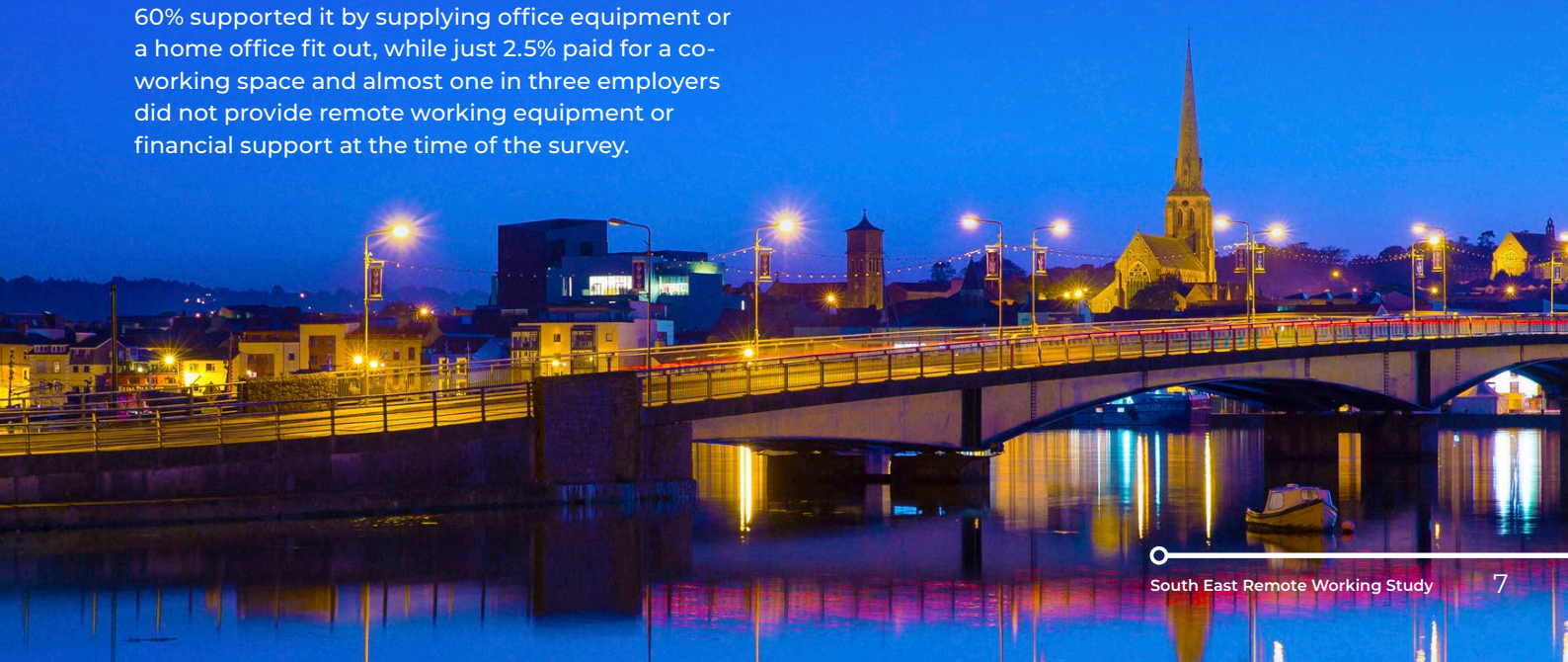
The average travel time to work saved by working remotely in the region was 50 minutes one way or 1 hr and 40 minutes for a return trip. 35% of responders were definitely or likely to return to the office within the year, leaving just one in three definitely not, or unlikely to, return to the office in the next 12 months and a third were unsure one way or another. Of those who were anticipating a return to the office within a year, 65% expected to be working a hybrid model combination of office and home or hub work location. Note, one in four did not know what their working arrangement would be in 12 months.

When queried about their employer's support for remote working, the research indicated that over 60% supported it by supplying office equipment or a home office fit out, while just 2.5% paid for a co-working space and almost one in three employers did not provide remote working equipment or financial support at the time of the survey.

The average spend per day of those currently working in hubs was €17, however it should be noted that this figure comes from 18 hub workers only. Those who do not currently work from a hub have indicated an anticipated average figure of €14.28 per day which is lower than the current hub workers experience of costs.

For potential new hub users the main motivator to access a hub would be the availability of high speed broadband, followed by their employers paying for the hub facility, with factors such as quiet work environment, price, office services such as photocopying, meeting rooms, etc, and good IT facilities all influencing the decision to use a hub rather than home or office working.

Collaboration with colleagues, availability of restaurant / canteen facilities and 24/7 access were lowest on the list of requirements. A third of those surveyed indicated they were interested in self-employment, and with almost one in four having a start-up business concept in mind.



SPOTLIGHT ON

CARLOW

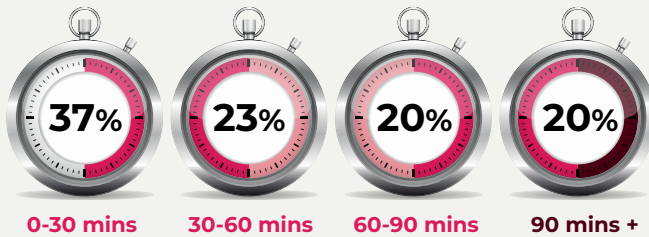


1 in 5 people in Carlow save over 3 hours per day by remote working.

The response rate to the research survey was relatively high with 30% of respondents currently working remotely in Carlow. 75% of these worked remotely full time, and 25% part time. In Carlow less than 1% of respondents worked fully from a hub, with one in ten working between hub and home and a significant 90% working fully from home. A quarter were employed by multinationals, a quarter by public bodies and a quarter worked for limited companies.

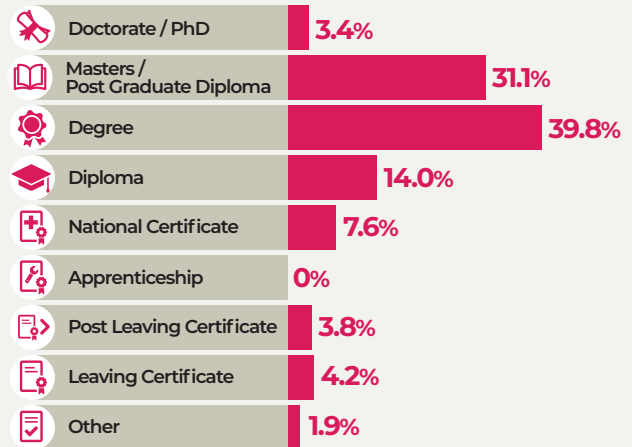
Carlow has the lowest level of remote workable private sector jobs in the South East at 2831 (*The Three Regional Assemblies of Ireland, 2020*), and this is half the average for the south east region. It currently has six hubs located in the county.

Time saved by remote working (one way)

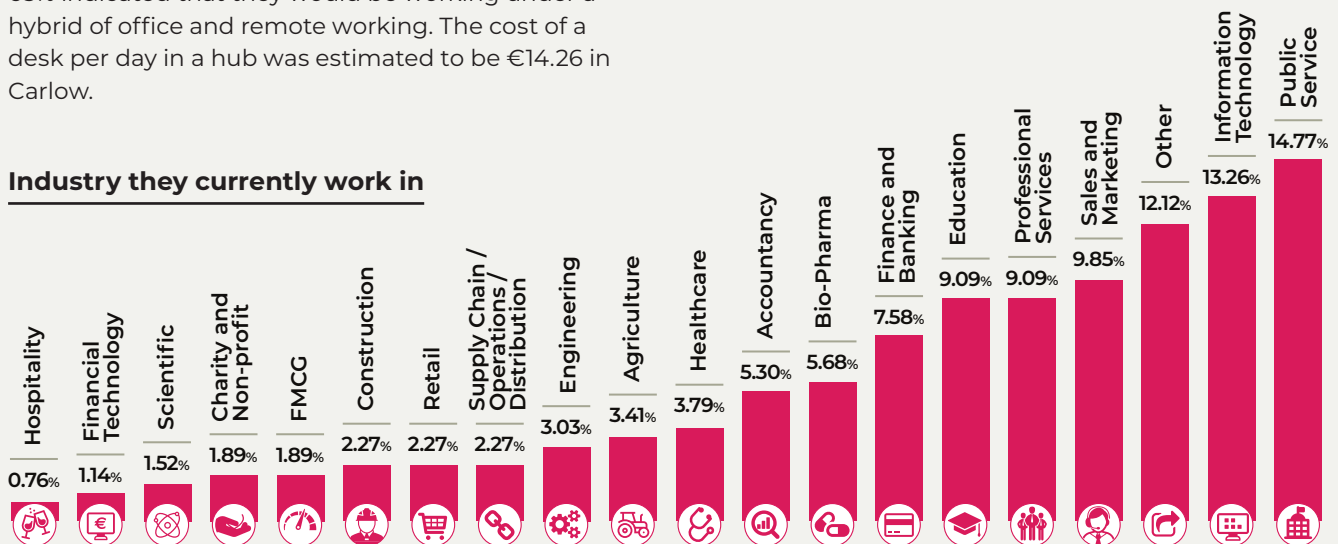


The average time saved by remote working was almost one hour each way. 68% indicated that they were not expecting or didn't know if they would return to the office within the year. For those who were likely or definitely going back to the office over 65% indicated that they would be working under a hybrid of office and remote working. The cost of a desk per day in a hub was estimated to be €14.26 in Carlow.

Their level of qualification

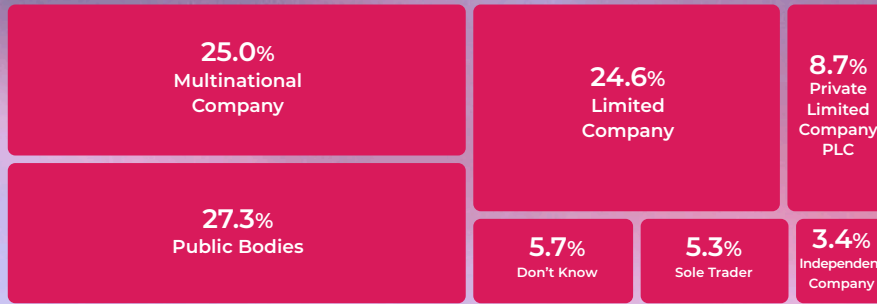


Industry they currently work in





Structure of current employer



There is a particular opportunity for Carlow to accredit, position and promote itself as a remote working hub 'Centre of Excellence' given its geographic location relative to Dublin and convenience to the motorways.

ENTERPRISE HOUSE CARLOW

Mary Wynne, Administrator

Enterprise House was established in 2005, and is part of a social enterprise initiative managed by Carlow Community Enterprise Centres Ltd.

The company's goal is to work with partners to foster entrepreneurship and develop economic activity in County Carlow. Enterprise House is unique in Carlow in that it provides a one-stop calling point for people starting and developing their enterprises.

Enterprise House provides a professional supportive facility for entrepreneurs embarking on their journey in business; from start-up advice to pointing people in the right direction for funding, to the provision of high specification ICT infrastructure, interactive training rooms, to networking and peer to peer support from fellow entrepreneurs.

With an annual footfall exceeding 50,000 people Enterprise House has become the focal point for enterprise in Carlow. More than 150 people work daily in Enterprise House with training centres hosting an additional 100 people.

Mary Wynne outlined that she anticipated, 'Future demand would be for individual or two-person offices, and also bigger offices that can accommodate a large team under socially distant parameters. Co-working under open plan is less appealing due to privacy and distraction issues. We are running at almost 100% capacity and are anticipating more demand from both individuals and companies.'

There is a particular opportunity for Carlow to accredit, position and promote itself as a remote working hub 'Centre of Excellence' given its geographic location relative to Dublin and convenience to the motorways.



SPOTLIGHT ON

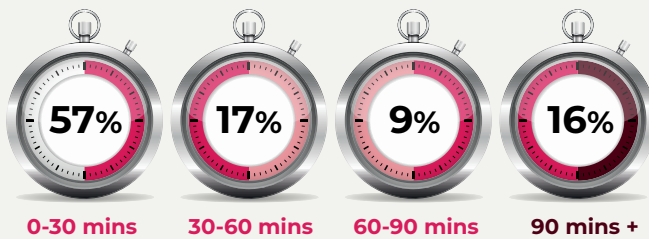
KILKENNY



During the research phase 22% of the remote working responses came from Kilkenny. Similar to other counties one in four remote workers did so on a full-time basis, and only a single respondent remote worked fully from a hub.

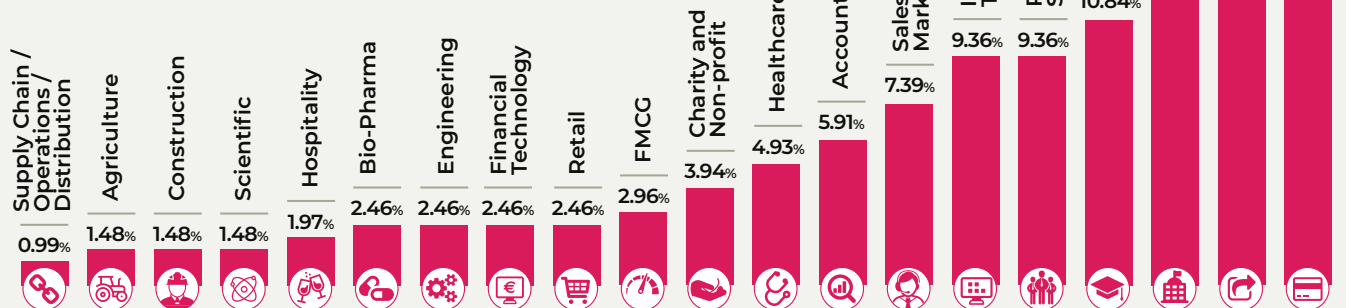
91 percent worked fully from home at the time of survey. Finance & Banking, and Public Service were the top two industries these remote workers were employed in. The high level of public remote workers could possibly indicate an opportunity for hubs if the government 'Mandate public sector employers, colleges and other public bodies to move to 20 percent home and remote working in 2021 (DEPR, Q4 2021)' (Department of Enterprise Trade and Employment, 2021).

Time saved by remote working (one way)



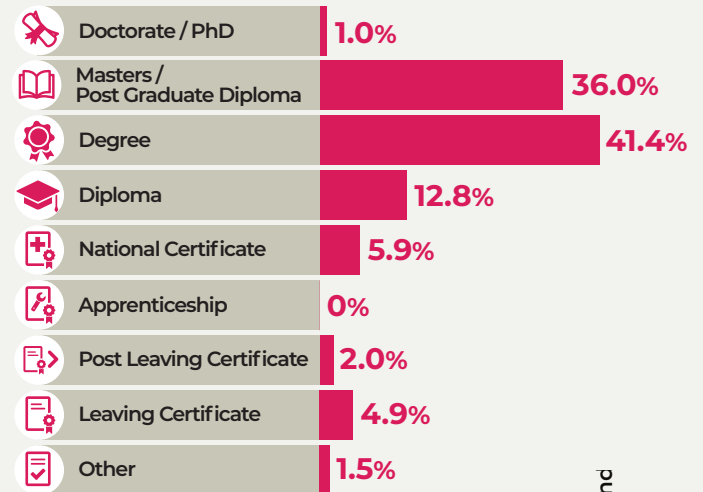
Responders were highly educated with over 40% indicating degree qualification, and a further 36% at Master or Post Graduate level. The average time saved on a commute to work was 45 minutes one way. 38% said that they were likely or definitely going to return to the office within a year, and of these almost 2 out of 3 indicated returning on a hybrid basis.

Industry they currently work in



For those not currently working in a hub over 50% indicated they could consider using one if it opened up near them. When asked how much they might be willing to pay per day for a desk in a hub the average answer received was €12.

Their level of qualification





Structure of current remote worker employer in Kilkenny



Kilkenny offers a vibrant city life and equally offers the options of rural living, with little commuting time into the city hubs.

The CSO 2016 census statistics indicate a total daytime working population in Kilkenny county as 29,931, almost a quarter of which commuted into the county to work. Kilkenny has 6 hubs based in the

county, and a slightly above average 6,000 remote workable private sector jobs. (*The Three Regional Assemblies of Ireland, 2020*).

NEW WORK JUNCTION

Tom O'Neill, Founder

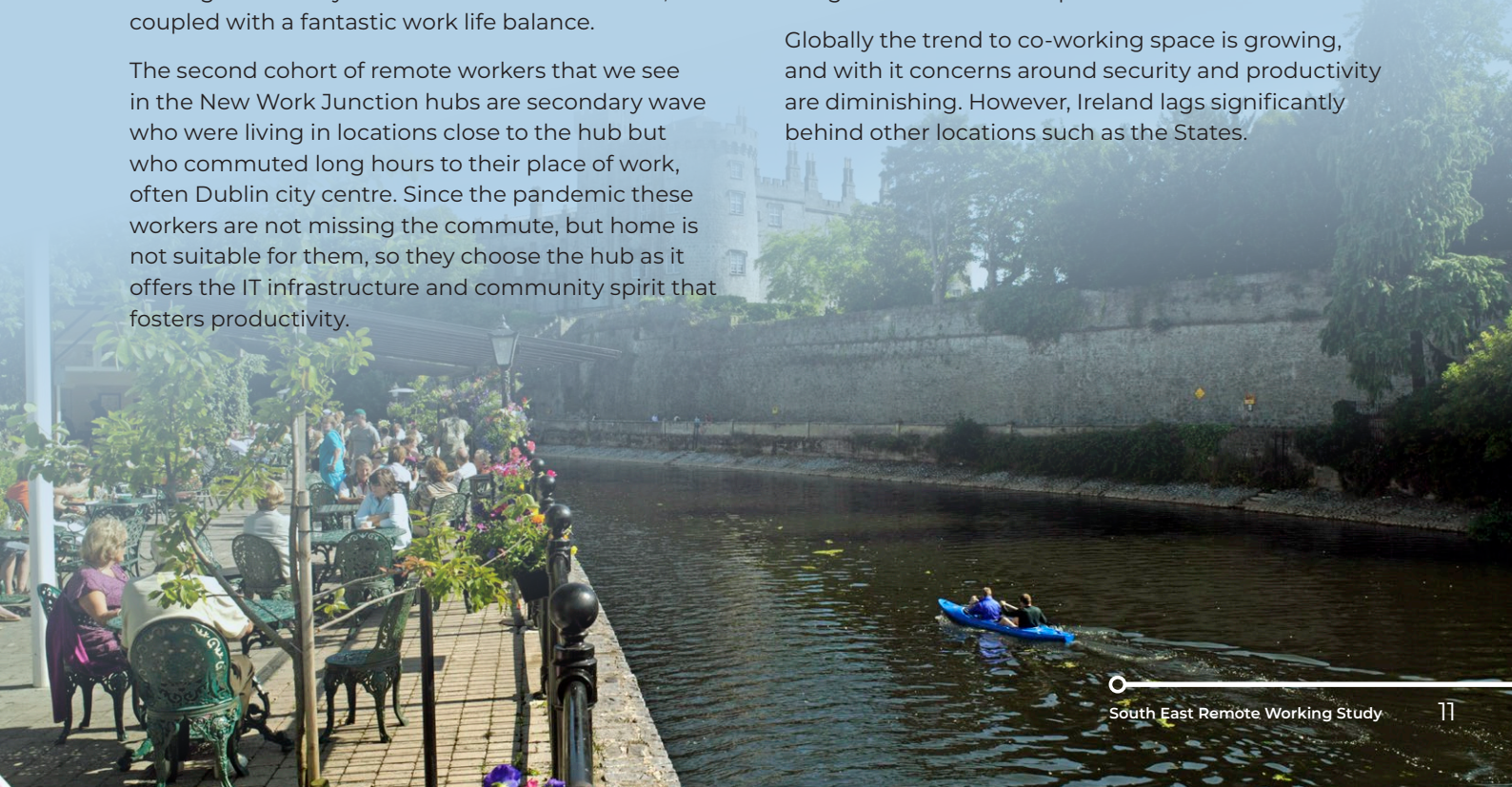
In Kilkenny remote workers have typically been working abroad, often remotely, and did their research on where to continue to work remotely when re-locating to Ireland.

Kilkenny offers a vibrant city life and equally offers the options of rural living, with little commuting time into the city hubs. Some of our remote workers have head offices in the States that they visit once or twice a month, and remote working in our hub otherwise. These are seasoned, international remote workers coming to Kilkenny because of the cultural buzz, coupled with a fantastic work life balance.

The second cohort of remote workers that we see in the New Work Junction hubs are secondary wave who were living in locations close to the hub but who commuted long hours to their place of work, often Dublin city centre. Since the pandemic these workers are not missing the commute, but home is not suitable for them, so they choose the hub as it offers the IT infrastructure and community spirit that fosters productivity.

There is also an opportunity to leverage new talent in the region to get involved in community committees and groups to use their global or national experience to stimulate a ground swell of engagement with and pride in supporting the development of cultural, community and urban activities that makes a town or village a more attractive place to live and work.

Globally the trend to co-working space is growing, and with it concerns around security and productivity are diminishing. However, Ireland lags significantly behind other locations such as the States.



SPOTLIGHT ON

TIPPERARY



Similar to other counties almost 4 out of 5 survey participants worked remotely full time with the balance working part time, with 9 out of 10 remote working fully from home.

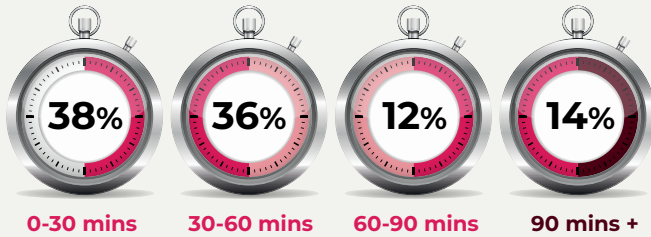
Charity and Non-Profit, Finance & Banking, Public Service and Sales and Marketing were the top sectors mentioned and accounted for almost 40% of the remote working responders from Tipperary.

A third worked for limited companies, 23% worked for Multinationals and one in five worked for public bodies. This cohort has a high standard of education with 3 out of 4 indicating qualifications at degree, Masters/Post Graduate or Doctorate level.

A further 40% said they were likely or definitely returning to the office, with two thirds of this cohort expecting to return on a hybrid basis.

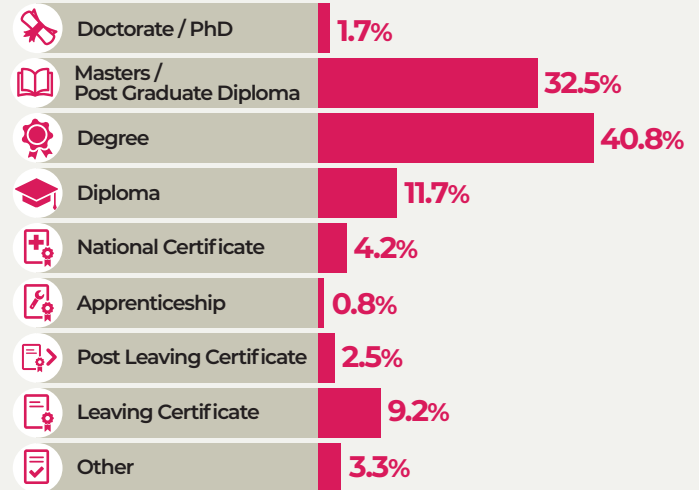


Time saved by remote working (one way)

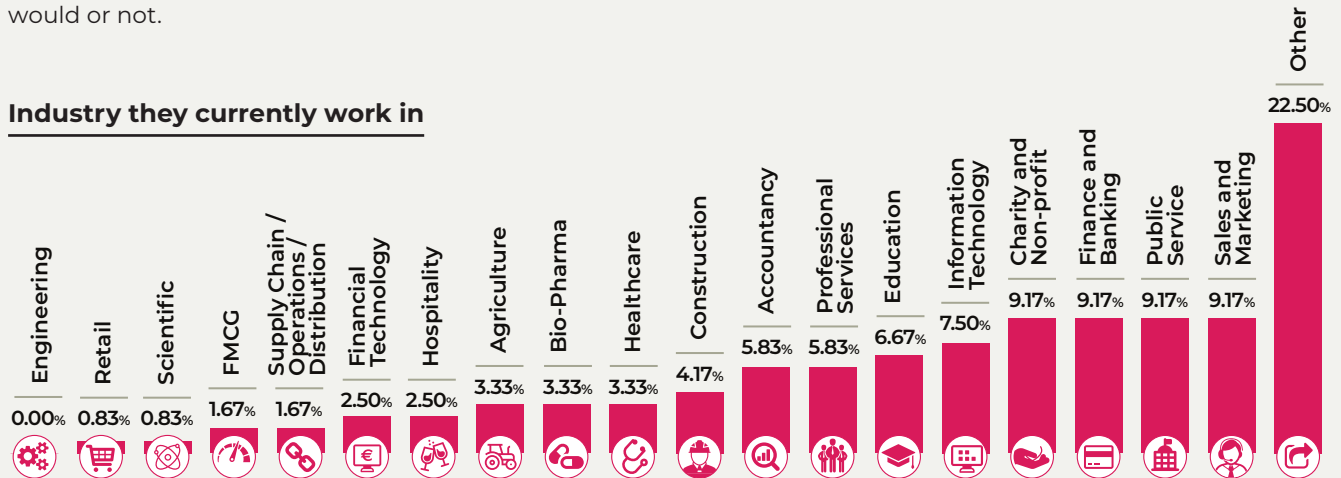


The average commute time saved per one-way trip was 52 minutes. A third of workers indicated that they were unlikely or definitely not returning to work in the office within the year, a quarter didn't know if they would or not.

Their level of qualification



Industry they currently work in





Structure of current employer



The Engine is expected to facilitate up to 80 workers within five year between co-working and privately rented office space and is expected to be especially attractive to local workers that faced long commutes in the past.

TIPPERARY ENGINE

Tipperary County Council, Jobs4Tipp and a number of other stakeholders in Tipperary have commenced plans to deliver a 13,000 sq ft Digital Hub and Enterprise Centre in the town. Tipperary Engine will encompass a mix of high end co-working and private enterprise / office space, and will partner with training providers such as Tipperary Education and Training Board to provide state of the art training facilities and deliver quality education opportunities in the areas of digital and business skills. The facility will form part of the mid-West e-hub 'Engine' network of Digital Hubs in collaboration with Limerick and Clare County Councils.

Funded by Enterprise Ireland under the Regional Enterprise Development Fund to the value of €500,000, and with Tipperary County Council providing a further €127,000, the project will be based at Tipperary Technology Park, works will commence in early 2021 with an expected launch date of October 2021. The Engine is expected to facilitate up to 80 workers within five year between co-working and privately rented office space and is expected to be especially attractive to local workers that faced long commutes in the past, prior to the Covid-19 pandemic.

As the pandemic passes and the blended working week becomes the norm, e-hubs like Tipperary Engine will be a critical piece of infrastructure in rural towns. A Commuting and Jobs profile carried out by Tipperary County Council in 2018 estimates that 1 in 4 workers based in the Town commute out of Tipperary each day. Tipperary Engine hopes to offer these workers a high-quality office environment closer to home.



SPOTLIGHT ON

WATERFORD

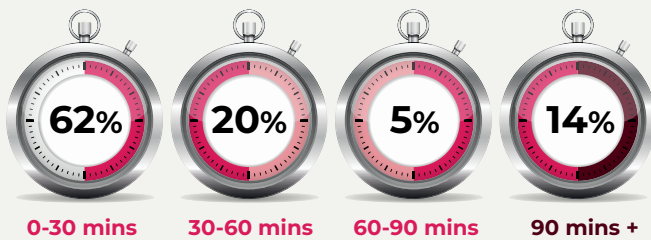


The 2016 census indicated a daytime working population in Waterford of 38,423 with 8326 commuting into the county daily.

80% of survey participants from Waterford worked remotely full time and the balance worked remotely part-time. Almost 3% of respondents worked fully from a hub, and 12% worked remotely on a hybrid model.

The most popular sectors to work remotely in Waterford were Information Technology, Professional Services and Education which accounted for a total of 45% of all Waterford respondents, with 41% working for a Limited Company, one in five working for a Multinational and 13% working for the Public Sector.

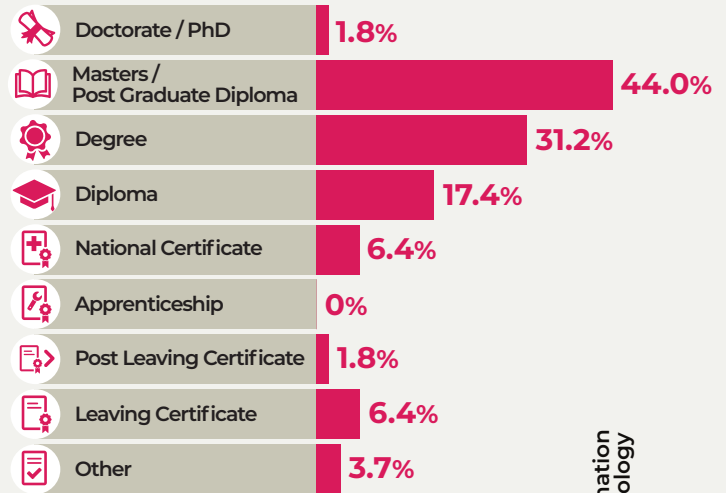
Time saved by remote working (one way)



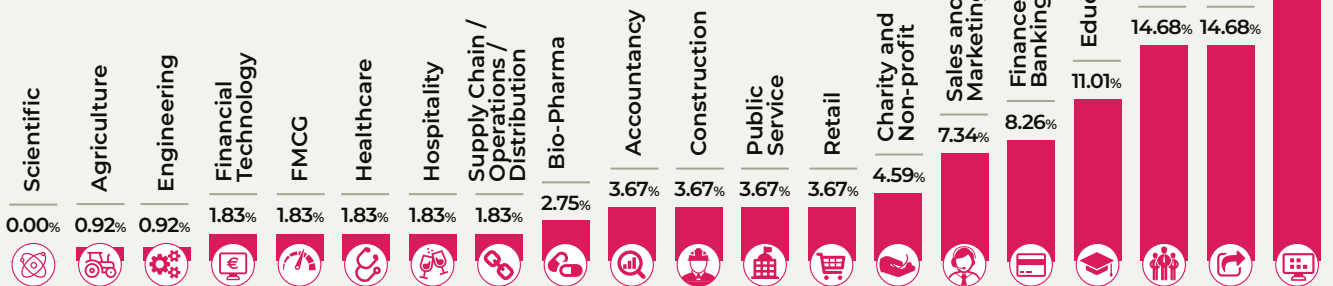
The participants are highly educated with 45% indicating a Masters / Postgraduate or Doctorate qualification. The average commuting time saved by working remotely was 38 minutes one way. Almost 40% of these remote workers indicate that they were likely or definitely returning to the office within 12 months.

75% of those indicated that their return would likely be on a hybrid working model between home and a hub or office. One in four outlined that their employer did not support working from home financially or through provision of equipment etc. For those not working in a hub, over 50% indicated they would be interested in using one if one opened close to them, and that they expected an average cost per day would be just over €17.

Their level of qualification

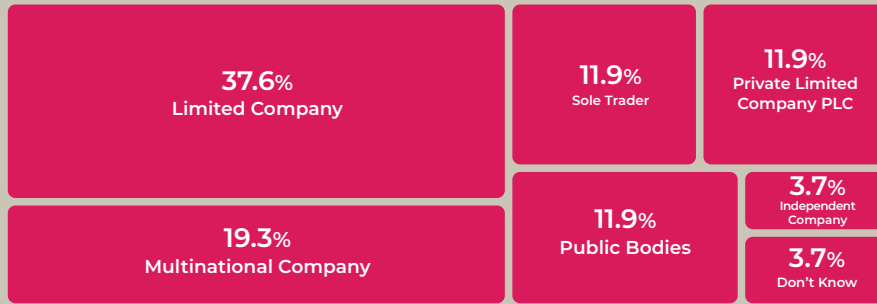


Industry they currently work in





Structure of current employer



Boxworks accommodates 125 people, and I estimate that the multiplier effect of Boxworks contributes on average €140 per remote worker per week to the city economy through parking fees, coffee, dining out etc.

Many indicated they didn't really know so couldn't estimate costs, or that they would not pay as they expected their company to pay for this service. Availability of high-speed broadband was the leading reason they would use a hub, followed by supported or paid for by my company and a quiet work environment. A third also indicated that price, good IT facilities, collaboration, 24/7 access, and office services would be important influence on their use of hubs. Over 50% of respondents indicated that they had a start-up concept in mind.



BOXWORKS

Jim Gordon, Director

Boxworks was set up in 2005 as a progressive and innovative co-working community space, and in Oct 2020 was named runner-up up in the 'Innovation Hub of The Year' category at the inaugural Digital Business Ireland virtual awards.

Jim Gordon, Director said, 'There here have been lots of enquiries from employees of companies wanting to work at Boxworks, rather than from home on a full time and part time basis, and I am very confident that the demand for co-working space is going to grow.'

'Boxworks accommodates 125 people, and I estimate that the multiplier effect of Boxworks contributes on average €140 per remote worker per week to the city economy through parking fees, coffee, dining out etc. This footfall also brings others into meetings and contributes significantly to the vibrancy and economic development of the City of Waterford.'

'Coworking culture is very important at Boxworks and a lot of collaboration takes place amongst the workers at the hub, often on a barter arrangement or through

guidance given over a cup of coffee or lunch in the kitchen. We also position ourselves as a Place to Learn and offer mentoring, PR supports, Founder Fridays, networking and social events. I believe that future growth will come from one or two-person offices, and we are constantly looking at global trends to plan for the future. We are anticipating growth in blended learning / meetings for groups and training events at Boxworks which could be 20 to 30 people in the room with presenter, and others logging in from home. We are responding to these trends by investing in this new technology infrastructure and systems such as Samsung Flip that allows for interactive teamwork.'



Jim Gordon and XYZ of Boxworks

SPOTLIGHT ON

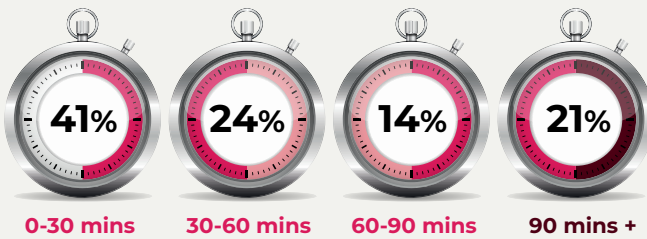
WEXFORD



72% of Wexford responses indicated that they remote work full time, with the balance remote working part time.

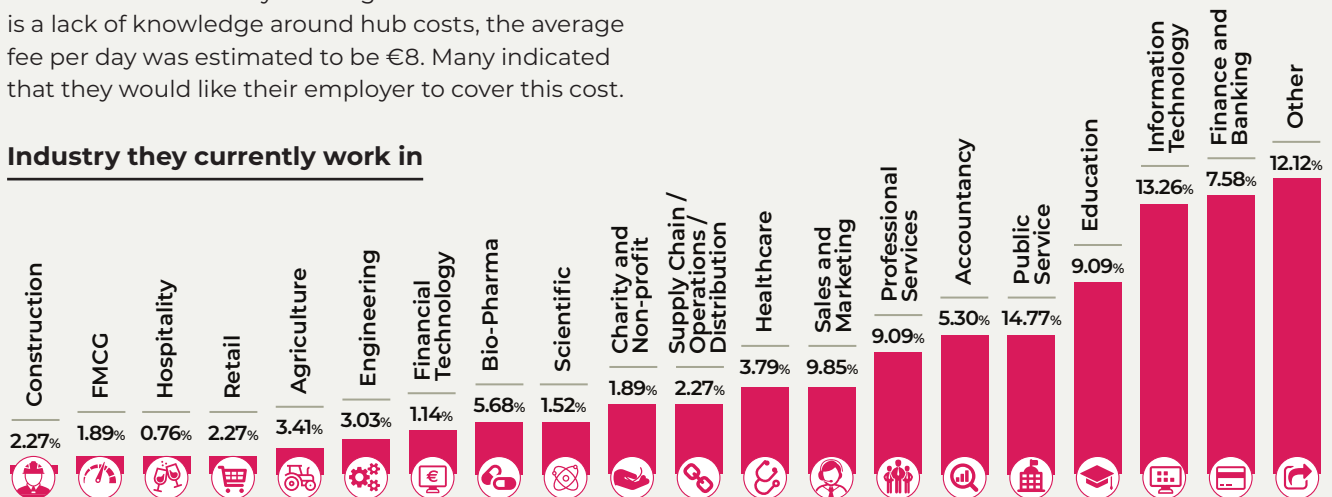
The average time saving by working from home or hub rather than the office was 54 minutes one way. Just one respondent indicated that they are permanently based in a hub, with 9 out of 10 working fully from home and 10% working remotely in a hybrid model. Finance & Banking and Information Technology were the top two industries accounting for 30% of responses received from Wexford's survey participants. One in three indicated qualification at degree, Masters or Doctorate level.

Time saved by remote working (one way)



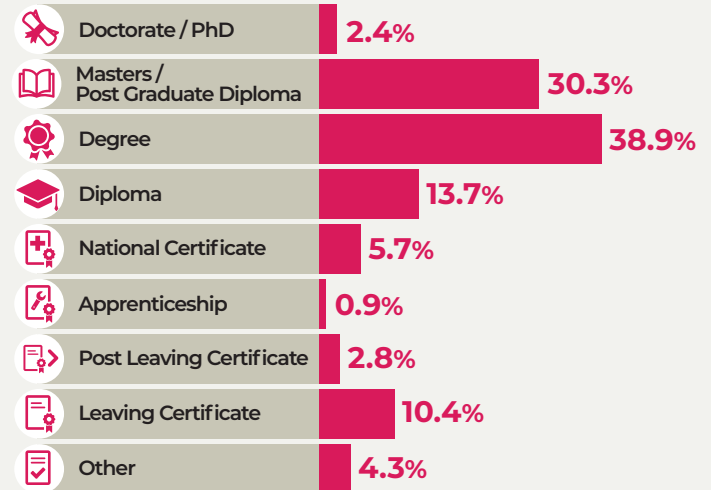
One in three cited that they would return to the office within 12 months, and over 60% of these respondents indicated they would work in a hybrid model, part in the office part at home / hub when they did return. For those not currently working in a hub while there is a lack of knowledge around hub costs, the average fee per day was estimated to be €8. Many indicated that they would like their employer to cover this cost.

Industry they currently work in



Wexford has the highest level of remote workable private sector jobs, 7,163, according to the Remote Co-Working analysis report with many of these jobs based in Dublin city centre which is commutable from Wexford. (*The Three Regional Assemblies of Ireland, 2020*).

Their level of qualification





Structure of current employer



During the lockdown we found that workers were coming to us as they liked not having to travel to Dublin but don't like being stuck at home.

THE HATCH LAB

John O'Connor, Manager

During the lockdown we saw two definite trends emerging.

'The first was requests for desk space for workers who had a holiday home in the locality and could now spend all their working week in Wexford rather than just at weekends as they didn't have to be in the office and could enjoy the benefits of being close to the sea. Often these were high earning individuals such as stockbrokers. The second trend has been enquiries from companies in Dublin who have several staff working remotely in Wexford and wanted a second site for 4 or 5 people.

Over 2,500 used to leave Gorey to commute to Dublin mainly from the ICT / Financial Centre and were used to a corporate office environment. During the lockdown we found that workers were coming to us as they liked not having to travel to Dublin but don't like being stuck at home. For individuals who are renting office space they are happy to pay a monthly fee of €250 even though they are only using these desks 2 or 3 times per week. We gave up offering hot desking on a daily or weekly basis as the administration and cleaning costs did not stack up.

The future of hubs is looking positive, but the caveat would be to develop existing or establish new purpose-built hubs.

I see the opportunities for smaller converted sites as less opportune, because to make the books balance a site needs to be at least 20,000 feet square and purpose built to deliver the standard of IT and office infrastructure that remote workers need.

Individual office space and office space that can accommodate a micro team of 5 or 6 people seems to be the way demand is going. Hot desking will likely come back, albeit slowly.'



DESK PROGRAMME

In 2019 Boxworks joined forces with Waterford Local Enterprise Office and the programme is currently providing free desk space for up to six months for participants awarded a place on the programme and is experiencing a high demand for its spaces.

Jordan started up and runs SCNE (Social City Nightlife and Entertainment) Waterford's Entertainment and Nightlife app.
www.thescne.com

'Through the Local Enterprise Office Desk Programme at Boxwork I was introduced to this vast business and technology community that I only thought could be found in cities such as Dublin or London, and these are cities where I would've previously felt I needed to relocate to in order to access this. In terms of opportunities, the quality of life offered here in Waterford, a small city, coupled with the same community and facilities found in larger urban areas is a huge opportunity. I think it's also easier to engage with the local business sector here, as there's definitely a warmer sense of belonging and togetherness.'

'I can't fully describe how much the Local Enterprise Office Desk Programme has been of benefit to my business, SCNE.'



Jordan Casey, Desk Programme Participant

The contacts and the support network around the hub through fellow co-workers and facilitators has been a major help, but also my productivity levels and efficiency levels have drastically increased too as opposed to just working in my bedroom, which is what I had been doing the past decade. I wouldn't be in the situation I am right now if it wasn't for the LEO Desk Programme and Boxworks, that's for sure.

My business is still at a relatively early stage and I do believe that Boxworks is still the perfect home for it. Upon further growth, I also believe that I would consider an office space within the Hub, rather than a full exit.'

“ I think it's also easier to engage with the local business sector here, as there's definitely a warmer sense of belonging and togetherness.

STUDY INDICATORS

1. There is a clear trend emerging with both employees and owner-managers in remote workable sectors / roles experiencing an increasing desire to move more towards more hybrid work options and flexible working hours.
2. Employees are strongly anticipating a growing demand for hubs as three out of every five responders who are not currently working in a hub would consider using one should one open up close by them.
3. This sentiment is backed by industry with the majority of stakeholders interviewed indicating a belief that growth would come from small (1 / 2 person) and larger team (5 / 6 person) office spaces particularly, followed by slower anticipated growth in open plan co-working desks.
4. Information Technology, Finance and Banking, Public Service, and Education were the most popular remote working sectors with survey responders.
5. The remote workers were highly skilled, with more than one in three educated to Master/ Post-Graduate or Doctorate level, and a further one in three qualified to degree level.
6. Two thirds of workers who expect to return to the office within 12 expect to do so in a hybrid model between home, and the office or a hub
7. Over 50% of responders could not name or were unaware of any hubs in their area.
8. Remote workers in the South East were mainly attracted to hubs by the provision of high speed broadband, seconded by their employers paying for the hub facility, with factors such as quiet work environment, price, office services such as photocopying, meeting rooms, etc, and good IT facilities all influencing the decision to use a hub rather than home working.
9. While facilities, location and infrastructure will vary hub by hub, the difference between the actual price versus price remote workers who are not currently using hubs would pay if one opened close to them is considerable, €17 versus €14.28 per day.
10. The commuting time saved per return trip to the office was 1 hr 40 minutes per day which allows more time for leisure and home, and reduces transport emissions.

The opportunities and challenges outlined in the following pages are a combination of analysis of the responses from over 900 remote workers in the South East, interviews with hub and company owners located in each of the 5 counties in the South East Region, Carlow, Kilkenny, Tipperary, Waterford and Wexford.

OPPORTUNITIES

1. The government's 'Our Rural Future' - Rural Development Policy 2021-2025 published by the Department of Rural and Community Development in March 2021 offers the biggest opportunity ever seen for remote workers and the development of a sustainable hub network nationally.
2. The South East region offers lower housing and childcare costs, rural/coastal lifestyles, great transport infrastructure etc, and companies who are open to offering flexible working balanced with improved quality of life can be successful in attracting talent willing to accept lower salary levels as a trade-off for improved work life balance.
3. Support for the development of hubs with purpose-built infrastructure and facilities will drive footfall, revenue and vitality to city, town and village locations, and this should be considered when developing economic development plans.
4. 57% of responders who are not currently using hubs would consider them. However, a significant number of remote workers were unaware of hubs in their area and so existing hubs may require social media or local marketing initiatives to promote awareness.
5. Remote working offers a company wider choice in facilitating the right person to work for their organisation from a location of their choice. This trend presents an opportunity for Ireland's Towns and Villages to market themselves as an attractive place to live.
6. Co-working hubs can deliver a sense of community, comradery, and co-opetition among workers as well as increased productivity, however enablers will need to be put in place to create and maintain this positive work environment.
7. Investment in technology that supports blended communications and learning such as video-conferencing, advanced online learning platforms etc will further strengthen the remote working environment.

8. Childcare costs is another strong motivator influencing remote working behaviour, and at an average of just over €4 per hour for primary school children and €3.50 per hour for pre-school children, Ireland's South East is the most affordable region in Ireland for childcare for both pre-school and primary school children. Childcare costs in the South East are over 50% cheaper than in Dublin. (CSO, QNHS Childcare Q3, 2016).
9. While this essentially emergency situation is difficult to predict, there are strong indicators that national and local government policy will require some re-design to accommodate the increase in remote working, and likely require some policy and legislation updates, such as the Right to Disconnect for example.

CHALLENGES

1. Development of remote working hubs could re-distribute the location of workers across the country, particularly dispersing from urban to rural locations. This is a double edged sword however, as remote working opportunities continue to develop it will open up the competition for these roles to national and international talent, and if they are fully remote will not bring economic benefit to the South East.
2. Delivery of the National Broadband plan is now more essential than ever in supporting remote and hybrid working, but where high speed broadband remains unavailable this will affect the opportunity for remote working.
3. Investment in technology innovations will bring with it the need for high levels of training and security risk mitigation. It is likely that remote workers will benefit from workflow tools to assist transparency and efficacy of workflow with its employees, which will also require further investment.
4. There has been a noted increase in enquires to Local Enterprise Offices from individuals seeking to develop small hub units in converted buildings in rural settings which will required considered feasibility studies to ensure commercial sustainability.
5. Hub providers could hit a barrier where their cost structure is higher than that anticipated by new hub users, and it should also be noted that a common sentiment was that remote worker would like their employer to pay hub costs.
6. There may be a push back from employees who do not have suitable remote working space in their home, or who do not have a suitable working environment at home to work effectively and employers will need to consider and support these workers wellbeing and productivity.
7. Mental health issues are expected to be a legacy effect of the pandemic, and employers will have an increased responsibility to provide for the welfare of their employees, particularly those working remotely. Employers will also need to consider their HR processes and staff wellbeing in a new way to accommodate remote workers while fostering collaboration, creativity, and teamwork.
8. Hub users can not currently reclaim VAT - could a 0% or reduced rate vat policy be considered for non-VAT registered people working from co workspaces and a Tax Credit or contribution to working from a HUB.
9. Some concerns by owners that hubs' services are viewed by the Department of Revenue as a space lease, and not a service, and are therefore subject to 23% VAT and rates which increases the costs to users.
10. Concern around potential government initiative that encourage the establishment of smaller hubs with subsidised rates offering office for as little as perhaps €50 per week which would weaken the current hub customers and likely be unsustainable over the medium to long term.
11. Blended working arrangement, and flexible working hours can mean that working time is blurred and each employer must protect their employees right to disconnect.



The South East region has numerous advantages to offer when it comes to remote working opportunities, particularly those that offer an improved quality of life.

This study is a starting point in understanding the current snapshot of remote working sentiment and behaviours in the South East, and the recommendations aim to guide future policy development and appropriate remote work supports as the region returns to a more predictable and manageable work situation once the pandemic has passed – a time we all look forward to.

