

The Expert Group on Future Skills Needs

Statement of Activity 2008

June 2009



Foreword

World class skills, education and training will continue to be a pillar of Ireland's competitiveness. As an open island economy, continuously supporting and promoting a dynamic export sector is the only long-term sustainable enterprise strategy for Ireland. The current climate of rapidly rising unemployment puts future skills needs into sharp focus. Future recovery largely depends on capitalising on the full potential of the people that live and work in Ireland, and this requires a flexible education and training system that enables our workforce to make the most of enterprise and employment opportunities as they arise.

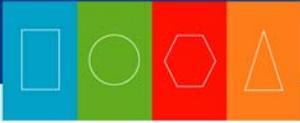


Investment in education and training at all levels must remain a priority and those in the education and training system must demonstrate that they are optimising the use of those inputs. There is no either/or choice to be made; investment must target those with the lowest level of skills who will otherwise be left behind and excluded from the labour force but also those with the highest levels of skill who will drive the Irish economy forward.

The Expert Group on Future Skills Needs has, in conjunction with enterprise, continued to identify the specific skills needs for many key sectors of the economy. Over the past 18 months, we have published reports on the skills needs of the ICT sector, the International Financial Services sector, the Medical Devices sector, the Construction sector. Some progress has been made on implementing the recommendations contained in these reports, but much remains to be done. The Expert Group has also engaged in wider skills issues, such as highlighting the importance of raising Ireland's mathematical achievement and working with our colleagues in the Northern Ireland Expert Skills Group in the production of the All-Island Skills Study. This study demonstrates that the improvement in the all-island skills base over the last decade has made a major contribution to all-island economic and employment growth, in terms of its impact on productivity and competitiveness.

The scale of unemployment that we face is extremely challenging. In the short term, it is right to focus on education and training measures primarily, though not exclusively on the unemployed. We need to ensure that those who have recently become unemployed or whose jobs are vulnerable are equipped with the right skills to take advantage of any job opportunities arising in other parts of the economy. We also need to ensure that there are further education and third level education opportunities for people currently employed who opted to enter the workforce on leaving school. The education and training system should also consider how it can help those on reduced working hours to upskill or reskill in their available time.

At the same time, we must keep our eye on the longer term goals for the labour market as laid out in the National Skills Strategy - to improve our retention rates to Leaving Certificate, to increase the progression rate to third level and to upskill and reskill 500,000 people within the workforce by 2020 - should continue to be a national policy priority.



It has been consistently established that the availability of a skilled workforce is not only one of the key attractions for foreign companies locating in Ireland, but also one of the key factors that drives entrepreneurship and the development of indigenous Irish industry. As we move towards 2020, there will be increased emphasis on transferable, soft skills including communication, interpersonal, team working and customer service skills. Skills in creativity, design, problem solving and innovation will be essential for high productivity, and a renewed focus on language skills and cultural understanding will be necessary for Irish companies to compete successfully in EU and global markets. Engineering and computer science skills remain in demand and will continue to be very important. Raising our national mathematical achievement can improve Ireland's competitiveness and each individual's ability to contribute and participate in an increasingly globalised and technological society.

Our current circumstances present us with an opportunity to engage a significant proportion of the labour market in upskilling that can put Ireland in a highly competitive position when the global economy recovers. This will ensure that we have the skilled workforce for the growth sectors of the future, including internationally traded services, food & drinks, life-sciences, software, energy/environmental goods and services, ecommerce and other web-related services. Employers, unions, employees and education and training providers all have a role to play.

Finally, I would like to thank the members of the Expert Group on Future Skills Needs, both past and present for their commitment to this important work. I would also like to thank Forfás and FÁS for the research and secretariat support that they provide to the group.

Una Halligan
Chairperson
EGFSN



Members of the Expert Group on Future Skills Needs

Ms. Una Halligan, Hewlett-Packard, Chairperson

Ms. Marie Bourke, Head of Human Capital and Labour Market Policy, Forfás (also Head of Secretariat)

Ms. Inez Bailey, Director, National Adult Literacy Agency

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Ms. Liz Carroll, Training and Development Manager, ISME

Mr. Ned Costello, Chief Executive, Irish Universities Association

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Mr. Roger Fox, Director of Planning and Research, FÁS

Ms. Una Halligan, Director, Government & Public Affairs for Ireland, Hewlett Packard

Mr. Pat Hayden, Principal Officer, Department of Enterprise, Trade and Employment

Mr. David Hedigan, Manager, Sectoral Enterprise Development Policy, Enterprise Ireland

Mr. Gary Keegan, Director, Acumen

Mr. John Martin, Director for Employment, Labour & Social Affairs, OECD

Mr. Dermot Mulligan, Assistant Secretary, Department of Enterprise, Trade and Employment

Mr. Frank Mulvihill, President, Institute of Guidance Counsellors

Dr. Brendan Murphy, President, Cork Institute of Technology

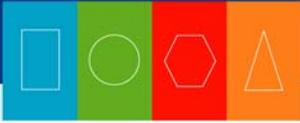
Mr. Alan Nuzum, CEO, Skillnets

Mr. Muiris O'Connor, Higher Education Authority

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Mr. Martin Shanahan, Divisional Manager, Science Technology and Human Capital, Forfás

Ms. Jacinta Stewart, Chief Executive, City of Dublin VEC



Introduction

Established in 1997, the Expert Group on Future Skills Needs (EGFSN) is a body appointed by the Irish Government to advise it on aspects of education and training related to the future skills requirements of the enterprise sector of the Irish economy. The Group is composed of representatives of business, employees, education, training, Government departments and State agencies.

The Group's mandate provides that it will act as the central national resource on skills and labour supply for the enterprise sector and on overall strategy for enterprise training in Ireland.

Specifically, the Group carries out systematic and detailed analyses in order to:

- Advise Government on projected skills requirements at national and sectoral levels and make recommendations on how best to address identified needs;
- Advise Government on associated priority training requirements and the most cost effective ways of responding to them;
- Advise on any skills requirements that cannot be met internally in Ireland at a given time and so must be met through inward migration;
- Advise on developments in content and delivery systems that support excellence in training quality elsewhere and on adaptations necessary to incorporate such developments into training provision here;
- Respond to any request for advice from the Minister for Enterprise, Trade and Employment on training programmes that are supported through the National Training Fund; and
- Report on progress made in the implementation of its recommendations.

The following Statement of Activity provides details of the group's output for 2008, changes to the group's membership, and information on the group secretariat and resources.



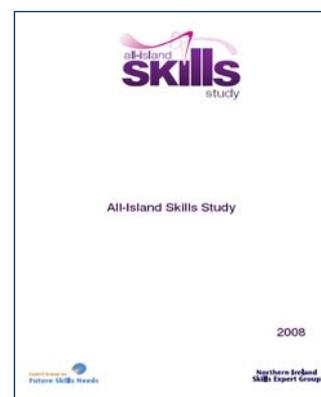
Activities of the Expert Group 2008

All-Island Skills Study and Conference

A comprehensive study on the all-island economy commissioned by the British-Irish Intergovernmental Conference (2006) emphasised the benefits of working together in a co-ordinated way to ensure that sufficient and appropriate skills are in place across the Island to encourage sustained growth. As a result, the Northern Ireland Skills Expert Group and the Expert Group on Future Skills Needs, agreed to work together on an All-Island Skills Study. Its purpose is to:

- extend the understanding of skills demand across the Island of Ireland; and
- provide a comprehensive picture of all-island skills demand which form an evidence base for future partnership and effective working between the two skills expert groups.

The All-Island Skills Study highlights the links between skills and economic performance in terms of improving productivity, competitiveness and innovation. It outlines the broad outlook for the structure of skills demand on the Island and points towards a higher skill profile of the workforce. Meeting this challenge will help sustain the future competitiveness of the all-island enterprise base and maximise the employment opportunities for individuals.



The Study highlights several potential areas of future joint working that would help North and South realise their closely aligned future skills ambitions. These are

- building up further the evidence base of skills demand;
- enhanced utilisation of our educational, training and research expertise;
- sharing good practice; and
- building up knowledge of skills demand in potential high growth sectors across the island.

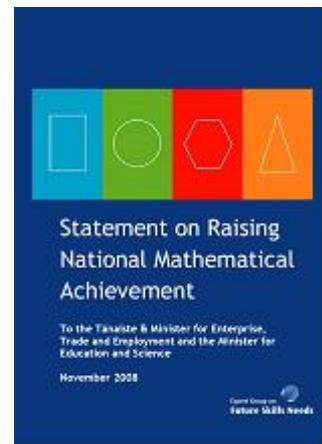
The study was launched at the first All-Island Skills Conference held in the Millennium Conference Centre, Derry on the 9th October attended by over 200 delegates. An Tánaiste, Mary Coughlan T.D. Minister for Enterprise, Trade and Employment and Sir Reg Empey MLA, Northern Ireland Department of Employment and Learning made the opening address and were joined by senior politicians and business people from north and south.

Importance of Raising National Mathematical Achievement

The EGFSN Statement on Raising National Mathematical achievement was published in December 2008. The core message of the Statement is that a national strategic approach is required to improve the level of our national mathematical achievement - in terms of both quality as well as numbers. The challenging vision is for Ireland to become one of the top OECD countries in terms of mathematical proficiency. This would mean moving upwards from our current position of 16th out of 30 OECD countries for mathematical proficiency among 15 year -old students. Mathematics is important because it underpins many other disciplines including science, technology and business. It

is an essential for sectors with growth potential such as ICT, Life Sciences, high-value engineering, business and professional services. However, a relatively low proportion of students (17%) take higher-level Leaving Certificate Mathematics and around 5,000 students did not achieve a level D or higher in Leaving Certificate Maths in 2008. A major concern from an enterprise perspective is the need for improved mathematical proficiency in order to foster a knowledge - based innovation driven economy. The Statement gives profile to valuable work underway to improve mathematics proficiency (such as within the Project Maths initiative); highlights key issues affecting our level of mathematical achievement and provides a set of complementary policy proposals with the aim of increasing the level of our mathematical achievement. Each policy proposal is an integral part of a broad set of measures that need to be implemented in a coordinated way. They can be summarised as follows:

- Provide professional development and recognition to Maths teachers at Primary and Secondary Level;
- Develop a more interactive, imaginative approach to teaching mathematics;
- Develop a more coherent progression of mathematics learning;
- Support the parents' role in their children's maths education;
- Incentivise students to take maths at Higher Level;
- Address the maths knowledge needs of adults in the workplace; and
- Benchmark and evaluate national maths education performance.



Future Requirement for High-level ICT Skills in the ICT Sector

The EGFSN Report, *Future Requirements for High-level Skills in the ICT Sector*, was published in June 2008. Its aim is to determine the future requirements for high-level ICT skills in the sector over the period to 2013; and to identify the proactive actions required to ensure that the supply of these skills will support its growth potential. The ICT sector here currently employs around 70,000 people in high value added activities. The upturn in the ICT sector since 2001 has been underpinned by the emergence of new Irish-owned start-up companies and by continued inward investment. The Report identifies several challenges facing the industry including a need to increase the domestic supply of graduates with high-level ICT skills. This should be seen against the background of a global shortage of high-level ICT staff with many countries facing similar challenges. The EGFSN proposes a number of proactive actions to be implemented in the short, medium and long-term to ensure that the future skills needs of the ICT sector will be met. The recommendations aim to contribute to ensuring that the required quality, quantity and diversity of high- level ICT skills are available. While the recommendations are designed to support the high-skill needs of the ICT sector, several will have a positive effect on adjacent sectors, and support the wider agenda on skills for enterprise. The successful implementation of these recommendations will require a collaborative approach between the many stakeholders involved.





The main measures the recommendations focus on are:

- A strategic approach towards communicating career opportunities and skills needs;
- Broadening the base of recruits for high-level ICT courses;
- Improving intake at undergraduate level;
- Ensuring third-level courses reflect the skills mix/diversity of ICT business ;
- Improving intake from third level into the ICT sector;
- Supporting computing and electronic engineering capacity; and
- Adopting proactive labour market strategies.

Despite current economic challenges the Group feels that the long-term outlook for this sector remains strong.

Future Skills Needs of the Irish Medical Devices Sector

The EGFSN report, Future Skills Needs of the Irish Medical Devices Sector, was published in February 2008. Its aim is to assess the skill requirements at all levels of the Irish Medical Devices Sector over the period 2007-2013 and to put forward recommendations to ensure that these skill needs will be met. Ireland is one of the leading global medical devices industry centres. In recent years, inward investment from overseas has grown rapidly, particularly in manufacturing and also world-class research and development. Sales by medical devices companies in Ireland are worth about € 6 billion per annum and employment has grown to nearly 24,000. Foreign owned companies account for 90% of employment. Even so, employment in Irish-owned companies is rising somewhat faster than in foreign -owned companies. The industry is making greater use of R&D leading to greater product and process innovation. A continuous focus on ongoing innovation is key for the industry to thrive and renew itself into the future. Globally, the sector is in the early stages of what is likely to be a rapid convergence between technologies. There is an opportunity to position Ireland as a location well equipped to undertake R&D and production operations in a range of bio-convergence products.



The study puts forward several recommendations which will help to underpin the future growth and development of the industry in Ireland. Their implementation will require the collaboration by the many stakeholders involved - in industry, academia, state bodies and expert organisations. The focus of the skills strategy for the medical devices sector is on:

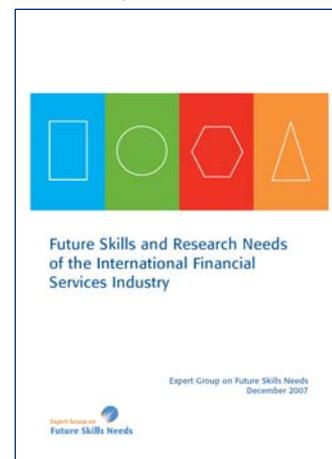
- Building operational excellence;
- Driving innovation in products and processes;
- Increasing entrepreneurial activity;
- Developing professional and specialist skills;
- Meeting opportunities that will be afforded by technological convergence; and

- Developing industry networks between professionals and managers involved in medical devices sector

Future Skills and Research Needs of the International Financial Services Industry - Progress on Implementation

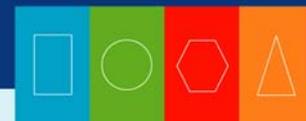
On the 12th January 2008, the report prepared by the EGFSN: *Future Skills and Research Needs of the International Financial Services Industry* was published. The launch of the report followed an extensive consultation and research process to identify the skills required by industry to support the continued development of the sector in partnership with Government and the State Development Agencies. The report underlines that Ireland is an attractive location for financial services investment and identifies a number of priority areas for skills development in the future including:

- Ensuring that undergraduate courses are up-to-date and relevant to industry needs and developing greater specialisation at postgraduate level. High level mathematics, quantitative, risk management and actuarial skills are in particular demand;
- Staff retention is an issue in some subsectors, which negatively affects costs and efficiency;
- The need to increase the research capacity of international financial services in Ireland; and
- Increased alignment between education and training providers and industry needs, with greater focus on niche areas which could deliver distinctive competences.



Following on from the report publication, the International Financial Services Clearing House Group Subgroup on Skills brought forward immediate action to address the findings. The result of this work is the FINUAS initiative. FINUAS is a new programme dedicated to specialised training within the international financial services sector, which is jointly funded by the government and companies within the sector. FINUAS is envisaged to run for up to 5 years with €2.5m allocated from the National Training Fund for 2009. Managed by Skillnets Ltd on behalf of the Department of Enterprise, Trade and Employment, FINUAS aims to support the sector in maintaining Ireland's position as a top international financial services centre through investment in the specialist skills and expertise of its workforce. FINUAS will facilitate international financial services companies to form enterprise-led learning networks which deliver training and professional development programmes that meet specific needs. It is expected that the networks funded under this initiative will commence operation in the summer of 2009.

The strategic intent of FINUAS is to upskill current and future employees in the international financial services industry - to sustain and increase market growth, exports, employment and investment, enabling it to make a significant contribution to national economic success. This strategy has two complementary aims. In the shorter term, to sustain existing growth in the industry by immediately upgrading the skills of the current workforce and addressing any current skills gaps. In the longer term, it aims to develop an expanded pool of labour with new capacity in those high-value skills which are necessary to underpin and retain a national competitive advantage.



A Review of the Employment and Skills Needs of the Construction Industry in Ireland 2007-2013

In December 2008, the EGFSN published its *Review of the Employment and Skills Needs of the Construction Industry in Ireland 2007-2013*. The report highlights that the construction industry will undergo a process of significant change in both quantitative and qualitative terms over the period 2007-2013. Overall, the study predicts that employment in the construction industry will be 231,000 in 2013, 54,000 below the 2006/2007 peak employment. Nonetheless, there are opportunities within the sector. Social housing builds are anticipated to expand, although this is contingent on the implementation of the NDP commitments in relation to social and affordable housing public-private partnerships. Home improvements and repairs are also expected to increase. The introduction of mandatory energy rating to the existing housing stock at the point of sale or rent from January 2009 will result in a significant increase in activity, particularly in insulation and the installation of sustainable technology heating systems. The infrastructure projects under the National Development Plan may also offer employment opportunities, but again, this is dependent on how the NDP is prioritised given current economic and fiscal difficulties.



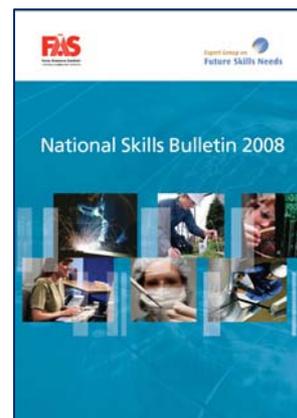
The report also highlights how the skills requirements of the industry are changing. In repair and maintenance, the main skills requirements will be for energy rating assessors, energy consultants, and, most significantly, insulation specialists and installers of sustainable technologies. New technologies and new forms of construction are emerging, such as off-site quasi-manufacturing methods of construction, panellised building methods, insulated concrete forms, which affect the mix of supporting skills required. Legislation and increases in mandatory qualifications for certain occupations are raising demand for specialised knowledge and professionals in areas such as energy efficiency, sustainable construction and project managers. Skills demands will decline particularly in the residential sector, most notably for occupations such as tilers, roofers, carpenters, bricklayers, plumbers, painters and plasterers. The restructuring of the industry will give rise to a number of key challenges:

- To assist those made redundant in house-building to acquire the skills to obtain alternative employment;
- To ensure that the skills and qualifications required by the new and expanding sectors of the industry are delivered in an effective and timely manner;
- To assist redundant apprentices to complete their apprenticeship;
- To ensure that the apprenticeship system is maintained at a level sufficient to meet longer-term industry needs;
- To ensure that the curricula of education and training courses are appropriately adapted to meet the changing requirements of the industry;
- To ensure that there are no difficulties in respect of skills and qualifications that would hinder the capacity of Irish contractors to exploit business opportunities in overseas markets;
- To adapt provision in the higher education system to the anticipated quantitative and qualitative changes in the construction industry;

- To provide alternative career paths for those young persons who would have previously been expected to take-up construction apprenticeships; and
- To ensure that where mandatory qualifications are required, suitable training, assessment and certification systems are in place.

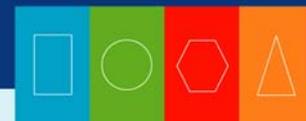
The National Skills Bulletin 2008

The National Skills Bulletin 2008 is the fourth annual by the EGFSN on skills and occupational trends in Ireland. This bulletin is developed by FÁS on behalf of the EGFSN. The objective of the Bulletin is to outline key labour market statistics in order to assist policy formulation in the areas of employment, education and training, and immigration. It also aims to provide information for students, career guidance advisors, and other interested parties relating to developments in the Irish labour market. The main focus of the Bulletin is the analysis of employment at occupational level for the period 2002-2007. However, the sharp deterioration in the economy and labour market since 2008 clearly has important implications for the demand and supply of skills and they have been fully taken in to consideration when commenting on skills shortages. Each occupation is examined in terms of its employment profile (based on the data from the Quarterly National Household Survey by the Central Statistics Office (CSO)), recent employment trends and other available indicators on the demand and supply of skills. The National Skills Bulletin 2009 will be based on data reflecting more current skills and labour market information which will provide an important indication of those occupations still in demand despite the current downturn.



By synthesizing all of the above information, the reports comments on the balance between the demand and supply for each occupation. Identified shortages are defined in terms of their characteristics, i.e. skill shortage or labour shortage, expected duration and significance. The report highlights recent and current shortages in the following sectors:

- High-level IT skills shortages are still expected to persist, particularly in the areas of software, IT services, systems integration, electronics, IC Design, automation and process control;
- The strong employment growth observed for scientific and other technicians combined with difficult-to-fill vacancy and employment permit data indicates that there continues to be a large volume of activity at technician level and that shortages persist, albeit not as acute as previously in the area of quality control and trouble-shooting, particularly in the pharmaceutical sector;
- Employers in the financial sector are continuing to experience difficulty in sourcing professionals in the areas of accounting (compliance, financial reporting), actuarial science, quantitative finance (risk and financial engineering) and underwriting;
- The need for further innovation in the information technology (IT) and pharmaceutical sectors will ensure that the demand for most engineering professionals (electrical, chemical, design and development, quality control and other engineers and technologists) will remain strong, especially as there has been a falloff in intake at third level since 2000 leading to possible future shortages; and

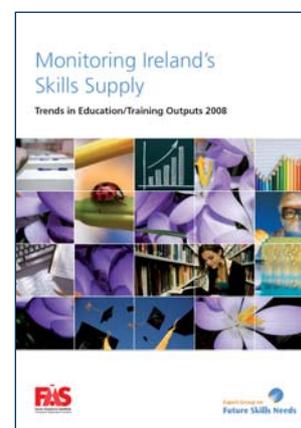


- There continues to be demand for experienced marketing managers and for sales personnel in highly technical areas which require specialist knowledge of the sector and/or product (e.g. software development).

Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2008

'Monitoring Ireland's Skills Supply: Trends in Education/Training Outputs 2008 is the third in a series of annual reports produced by FÁS on behalf of the EGFSN. The objective of this series of reports is to provide an indication of the supply of skills to the Irish labour market from the formal education and training system. Although the data includes both part-time and full-time participants in education, the main focus is on those who have yet to enter the labour force. The report examines outflows from the formal education system across levels 3-10 of the National Framework of Qualifications (NFQ). At each level, the supply of skills is examined in terms of:

- Graduate output: refers to the number of individuals who receive an award on completion of a course of study. Graduate output trends are used as an indicator of the potential current supply;
- Student inflows: this is used as an indicator of the potential future supply;
- Gender: this is used as an indicator of gender balance;
- Discipline: this is used as an indicator of the supply of skills by broad type;
- First destination: this is used as an indication of students' destination following graduation from higher education; and
- International comparison: this is an indicator of how Ireland performs internationally in terms of education outflows.



The main findings of the report include:

- Fertility rates provide an indication of the future pool of children available to enter the education system at primary level (i.e. junior infants). Ireland ranks third in Europe with a fertility rate of 1.93%, surpassed only by Iceland and France;
- The number of Leaving Certificate students declined slightly by -0.3% to 53,926 and the number of Junior certificate students declined by -0.7% to 57,395;
- 142,648 FETAC awards were made in 2007 to 128,624 candidates, 17,525 more candidates than in 2006. Approximately 48 percent of all candidates were under 30 years of age;
- The number of applications for level 6/7 courses is declining due to a combination of increasing numbers of applications to level 8 courses and declining numbers of candidates at Leaving Certificate level;
- Approximately 25,500 level 8 awards were made by universities and institutes of technology in 2007, a 3.5% annual increase, and an increase of 28 percent since 2002. Females are increasingly outnumbering males in terms of level 8 award recipients. Females increased their share of graduations from 54% of total level 8 awards in 2002 to 60% in 2006; and

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- There has been a significant increase in the number of level 9/10 graduates since 2002: graduations increased by approximately 48%, going from almost 9,150 in 2002 to over 13,550 in 2006.

Forthcoming EGFSN Publications

Report on Skills for Creativity, Design and Innovation

To be published in the first half of 2009, this EGFSN report will address Ireland's need for skills in creativity, design and innovation. Skills in creativity, design and innovation are key drivers of productivity improvement. Most productivity improvement arises from new or improved products, services and business processes, which allow businesses to create more value out of the efforts of each worker.

While skills relating to specific occupations and industries are often important for innovation, the report looks at cross-cutting skills that apply across occupations and across many industries. The report complements existing work by the EGFSN of specific industries and specific occupations. It also builds on existing work on generic skills, upskilling and lifelong learning, all of which contribute to creativity and capability to be innovative. In its treatment of creativity and design, the report focuses particularly on their role as drivers of innovation. The report is concerned with creativity, design and innovation in a business context, and so it uses definitions that are relevant to the business context.

A quantitative tool for workforce planning in Healthcare: Example Simulations

In December 2007, the Department of Health and Children (DoHC), on behalf of the Joint DoHC / HSE Working Group on Workforce Planning in the Health Services, requested assistance in workforce planning from the Expert Group on Future Skills Needs (EGFSN). In response, the Skills and Labour Market Research Unit (SLMRU), FÁS, on behalf of the EGFSN, has developed a series of quantitative models and produced projections on the demand and supply of healthcare workers.

The research began in February 2008 and was overseen by a liaison group consisting of representatives from the DoHC, the Health Service Executive (HSE), the Department of Finance, the Department of Education and Science (DES), the EGFSN and the SLMRU. The report summarises the models developed to assist the DoHC and the HSE in workforce planning, issues identified in relation to the workforce planning of each occupation covered and comments on the balance between the demand and supply of healthcare workers for alternative demand projections. The main objectives of the research are:

- To develop a quantitative model which can be used beyond this project as a tool for the assessment of different policy scenarios relevant in the context of the Government's healthcare workforce planning; and
- To simulate the model and assess, in quantitative terms, the balance between the current and expected future demand and supply of skills under different sets of assumptions about the model parameters as defined by the liaison group.



Future Skills Requirements of the Wholesale and Retail Sector

In September 2008, the Expert Group on Future Skills Needs was requested by the Department of Enterprise, Trade and Employment to provide an in-depth study of the wholesale and retail sector. The main object of the study is to assess the skills requirements of the wholesale and retail sector in Ireland over the period to 2016, particularly considering the upskilling targets of the National Skills Strategy. The ultimate aim is to secure agreement between relevant stakeholders (policymakers, enterprises, unions, and education/training providers) on a set of actions necessary to achieve to significant engagement in upskilling and education and training to the mutual benefit of enterprises, employees and the State. In doing so, the study aspires to improve dialogue and interactions between employers, employees and education and training providers, enhance perceptions of the sector as a rewarding place to work, and increase awareness of potential career paths on offer. The study has a number of specific objectives:

- Develop a clear understanding of the parameters of the wholesale and retail sector;
- Identify and establish the barriers and opportunities for human capital development within the wholesale and retail sector;
- Determine current and future skills supply and demand to 2016; and
- Put forward recommendations to progress skills development within the wholesale and retail sector.

A steering group has been established consisting of wholesale and retail industry representatives from unions, employers and the education and training sector.

Skills Requirements for the Food and Beverage Sector

The food and drinks sector alone remains Ireland's largest indigenous employer. Employment estimates for this sector are around 50,000 directly employed, with a further 60,000 in distribution and other services. Food exports represent 66% of total exports from indigenous companies in Ireland. The agri-food sector remains a key element in the overall economy and in particular a vital component of the indigenous sector. It is facing unprecedented and multi-faceted change and evolution in the years ahead, bringing with it potential new opportunities not envisaged even a few short years ago. It is however a sector in which at least 30,000 of the workforce have attained no higher than upper secondary level education and significant skills gaps have been identified. With these considerations in mind, and bearing in mind the upskilling targets of the National Skills Strategy, the EGFSN was requested by the Department of Enterprise, Trade and Employment in September 2008 to provide an in-depth study of the sector with the following objectives:

- Describe the current sector overall in terms of its position within the Irish economy and the change drivers that are affecting its current and future performance;
- Identify any particular changes, either to the sector overall or within specific sub-sectors, particularly to the extent that these may have a bearing on skills requirements;
- Profile the current composition of those employed within the sector in terms of educational attainment, age, gender and nationality;
- Review education and training provision information and highlight any consequences arising for skills; and

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- Based on the findings of the research, assess what further action is required to meet the current and future skills needs of the sector in Ireland, recommend concrete steps to be taken to give effect to this and identify the appropriate bodies to be charged with implementing each such recommendation.

Research and Secretariat Resources

The work of the EGFSN is managed by Marie Bourke, Head of Human Capital and Labour Market policy at Forfás.

EGFSN work undertaken by Forfás is funded through the National Training Fund. In 2008, the Group's expenditure was €534,510.

Research and Secretariat support is provided to the EGFSN by Forfás and FÁS Skills and Labour Market Research Unit (SLMRU). FÁS operate the National Skills Database on behalf of the EGFSN.

Forfás

Marie Bourke	Head of Human Capital and Labour Market Policy Department
Gerard Walker	Senior Policy Adviser
Andrew Colgan	Policy Adviser
Aisling Penrose	Executive Assistant

FÁS

Roger Fox	Director, Planning, Research & EU Affairs
John McGrath	Manager SLMRU
Jasmina Behan	Assistant Manager SLMRU
Ivica Milicevic	Research Officer
Joan McNaboe	Research Officer
Caroline Shally	Assistant Research Officer
Nora Condon	Research Consultant
Anne Marie Hogan	Executive Assistant



Appendix I

Publications by the Expert Group on Future Skills Needs

Report	Date of Publication
A Review of the Employment and Skills Needs of the Construction Industry in Ireland	December 2008
Statement on Raising National Mathematical Achievement	December 2008
National Skills Bulletin 2008	November 2008
All-Island Skills Study	October 2008
Monitoring Ireland's Skills Supply: Trends in Education/Training Outputs 2008	July 2008
The Expert Group on Future Skills Needs Statement of Activity 2007	June 2008
Future Requirement for High-Level ICT Skills in the ICT Sector	June 2008
Future Skills Needs of the Irish Medical Devices Sector	February 2008
Survey of Selected Multi-National Employers' Perceptions of Certain Graduates from Irish Higher Education	December 2007
The Future Skills and Research Needs of the International Financial Services Industry	December 2007
National Skills Bulletin 2007	November 2007
Monitoring Ireland's Skills Supply: Trends in Educational/Training Outputs	June 2007
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