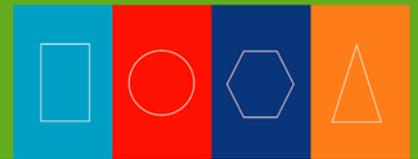


# Update on Future Skills Needs in the Food and Drink Sector

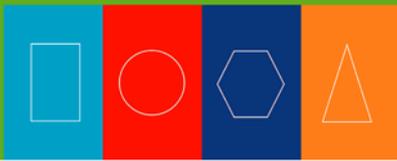
12 April 2017

1st Report  
Expert Group on Future Skills Needs  
2017



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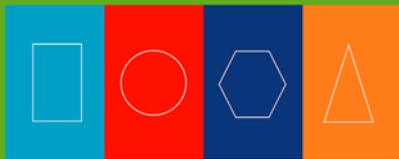


## Acknowledgements

The preparation of this report relied substantially on inputs from a wide array of stakeholders from both public and private sectors. We would like to thank all of the industry representatives and business people, academics, and staff of many State Agencies and Government Departments, who contributed both their time and their clear understanding of this complex area.

In particular, we wish to thank the Department of Agriculture, Food and the Marine for their close collaboration and substantial work in ensuring that we made contact with a broad range of stakeholders, as well as for organising a successful workshop to discuss the issues that emerged. We are also grateful to the CSO and Bord Bia for providing relevant data to underpin our discussions.

The EGFSN secretariat also wishes to thank the members of the Expert Group for their helpful contributions and comments on drafts of this paper, both during and between meetings.



## Foreword

On behalf of the Expert Group on Future Skills Needs I am pleased to introduce this Update on Skills Needs in the Food and Drink Sector. The report has been carried out on foot of a request from the Department of Agriculture, Food and the Marine, included in Food Wise 2025. We have collaborated with that Department in carrying out the research and consultation that fed into the report.

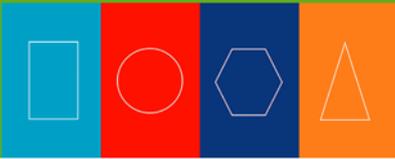
Food and drink manufacturing is the largest indigenous sector, with 56,000 directly employed and exports of more than €11.5 billion. Both employment and exports have now recovered to 2009 levels, or exceeded them. Additionally, it is estimated that there is about the same quantity again of indirect employment associated with the sector, as well as twice this number of farmers. Beyond this, Food Wise 2025 projects significant growth over the coming years, with a target of 85% exports growth to €19 billion by 2025, as well as an increase of 23,000 jobs over the period. It is clear, however, that these targets are dependent, among other things, on successfully addressing the skills needs of the sector.

Within the sector, there are sub-sectors like dairy, meat, consumer foods and fish. Each has its own list of strengths and issues to be addressed. Of primary concern to many is the current uncertainty around Brexit and the consequent depreciation of sterling which is putting substantial pressure on low-margin sectors exporting to the UK. At the same time, as in every sector, we find that small and micro firms face different challenges from larger companies. In particular, smaller firms need support in thinking about strategic HR issues, as most will not have a separate HR function or even a HR manager.

The current report focuses on the manufacturing activities within the larger agri-food sector. The report updates the 2009 report of the EGFSN entitled Future Skills Requirements of the Food and Beverage Sector and finds that substantial work has been done since 2009 in implementing most of the recommendations made.

However, there continue to be gaps and skill needs that the sector needs to address. This report makes eleven recommendations under four headings: work-based learning; internships, mentoring and apprenticeships; language and international skills; and coordination. Skill requirements arise at three levels: at operative level with a focus on literacy and numeracy; at middle management level with a focus on lean production and business strategy; and at senior management level, where gaps have been identified in succession planning, new product development and internationalisation skills. The fourth heading relating to coordination argues that improved communication between the relevant actors, both public and private, should lead to more coherent and effective solutions.

Now that these recommendations have been made and agreed by the relevant stakeholders, implementation is critical. I wish to thank all of those who contributed to the report. However,

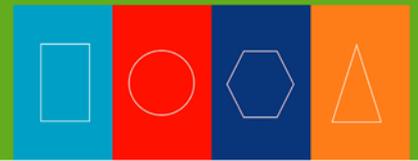


the work doesn't stop the report's publication, but continues through the cooperation of numerous stakeholders in delivering its recommendations.

I would like to express my support for all who have worked with us to date and those who continue to work to understand and solve the skills issues in this sector.

Tony Donohoe

Chairman, Expert Group on Future Skills Needs



## Executive Summary

The EGFSN completed a review of the skills needs in the food and drink sector in 2009, titled 'Future Skills Requirements of the Food and Beverage Sector'<sup>1</sup>. This update assessment on skills needs in the sector was undertaken to determine the nature and extent of any issues in the sector currently and to identify areas that may warrant more detailed review, following a request from the Department of Agriculture, Food and the Marine as set out in Food Wise 2025. The scope of the study is specifically in food and drink processing and manufacturing, and does not include primary production or grocery retail. Given the uncertainty around Brexit and potential outcomes, the research was focused on the immediate challenges for the sector.

The Food and Drink sector has expanded significantly over the period and increased exports by more than 50 per cent; employment in Enterprise Ireland, IDA Ireland and Udaras supported firms has increased by almost 6,600 (+13%) since 2009 to reach 54,000 in 2016. This recovery in employment and expansion of output has been in the context of significant change in the food and drink sector generally with an increased focus on sustainability and traceability of origin and increased integration of ICTs, regulatory requirements and of science-based product innovation and a diversification of markets for Irish exports. The impact of Brexit will further accelerate the impact of a number of these drivers of growth, in particular in relation to market diversification. The sector relies on skills supply from both the domestic education and training system and also from a continued flow from outside the country. This is particularly the case at operative and production occupation levels.

The Food Wise 2025 Strategy envisages an 85 per cent increase in exports over the ten year period to 2025. The Strategy recognises that skills and talent will be essential to this expansion.

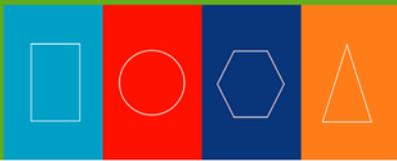
The analysis and consultations undertaken as part of this review indicate particular skills requirements giving rise to issues for manufacturers in the sector across three distinct levels:

1. Operatives and production level, where there is considerable need for literacy, numeracy and basic ICT training, hygiene and HACCP training, as well as some specific areas including craft skills such as de-boning.
2. Middle management where there continues to be a need for lean production, supply-chain management, business strategy, marketing and other management skills.
3. Senior management where there are gaps in succession planning, new product development and internationalisation skills.

The key recommendations set out from the review are in the following four areas:

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<sup>1</sup> [http://www.skillsireland.ie/media/egfsn091120\\_skills\\_food\\_beverage.pdf](http://www.skillsireland.ie/media/egfsn091120_skills_food_beverage.pdf)



#### **Work-Based Learning:**

1. Increasing accessibility of courses on numeracy, literacy and basic ICT skills;
2. Examining incentives in other countries to support firms releasing staff for training;
3. Developing and promoting additional skills and training options for middle management and succession planning.

#### **Internships, Mentoring & Apprenticeships:**

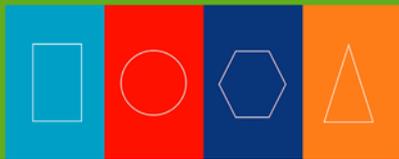
4. Third level sector to ensure work placements are part of all undergraduate and postgraduate degree courses relevant to the sector;
5. Establishing a two-year mentorship programme focussed on SMEs;
6. Organise a Millennials focus group to better understand how to attract and retain graduates;
7. Increasing industry participation in food and beverage sector relevant apprenticeships programmes.

#### **Language and International Selling Skills**

8. Ensuring languages and international selling are part of graduate learning in courses relevant to the sector; languages should be developed from primary through third level;
9. Examining how best to support and promote language training, including on-site.

#### **Coordination:**

10. Convening an annual stakeholder workshop of education and training providers and industry to assess priorities and progress on delivery;
11. Establishing a One-Stop-Shop website to provide information about education and training courses of relevance to the sector;
12. Monitor the implementation of these actions and complete a more detailed assessment of supply and demand needs for the sector and of the potential impacts of Brexit as part of the work of the EGFSN's overall skills assessment work in due course.

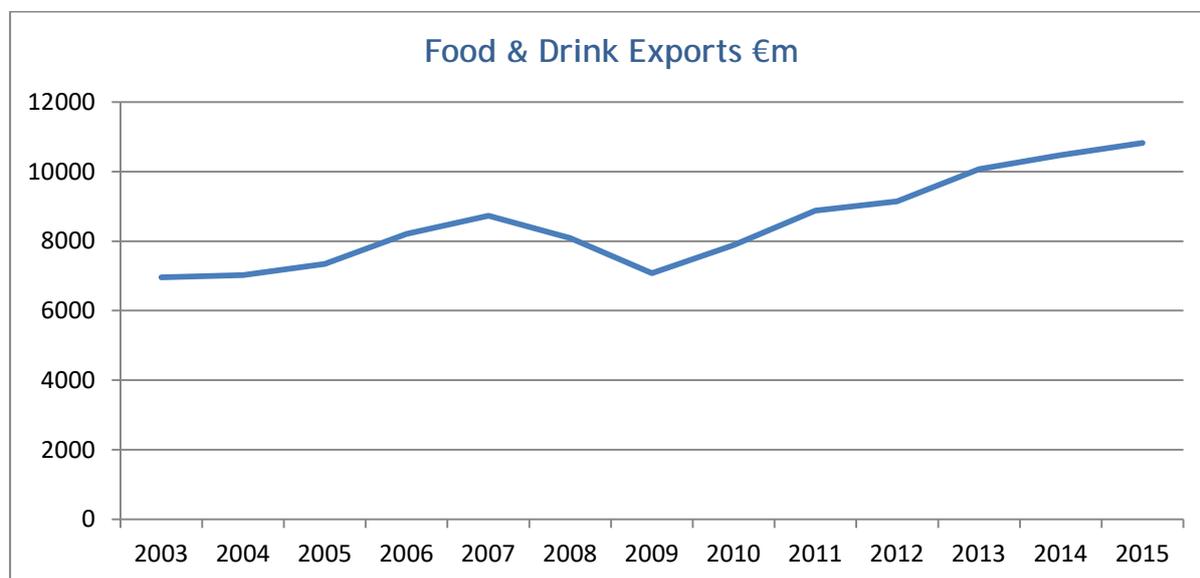


# 1 Background

## 1.1 Summary of the sector

The Food and Drink sector has grown strongly over the period from 2010 to 2016 and has recovered both the employment and output lost at the beginning of the recession. CSO data indicates that 2016 exports for the sector exceeded €11.5 billion for the first time. This represents an increase of almost €4 billion over 2009<sup>2</sup>. Employment in Enterprise Ireland, IDA Ireland and Udaras supported firms in the sector increased to 54,000 in 2016, an increase of 6,600 from 2009. While the outlook overall remains positive for the sector as global demand continues to increase, and there are ambitious targets in the Government's Strategy Food Wise 2025, the impact of the UK referendum on leaving the EU remains unclear. There are a number of Food and Beverage firms for whom the subsequent depreciation of sterling has resulted in significant competitiveness issues.<sup>3</sup> Meanwhile firms are continuing to diversify markets. In 2016, while food and drink exports to Great Britain decreased by 6% in value terms compared with the 2015 to €3.9bn, in part due to sterling depreciation, exports to the rest of the EU increased by 2.2% to €4.1bn, exports to the US increased by 22.7% to €929m and exports to China increased by 32% to €860m.

Table 1: Food & Drink Exports 2003-2015, Bord Bia



Exports by the sector, reported by Bord Bia, break down as follows: Dairy Products & Ingredients, 29.9%; Prepared Foods, 22.3%; Beef, 16.6%; Beverages, 11.6%; Fish, 5.3%; Pigmear, 5.2%; Poultry, 3.0%; Sheepmeat, 2.2%; Edible Horticulture & Cereals, 2.1%; Live Animals, 1.8%; the pie chart below represents these statistics.

<sup>2</sup> Bord Bia Export Performance & Prospects

<sup>3</sup> (CSO: Goods Exports and Imports, 2016)

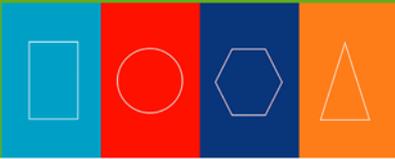
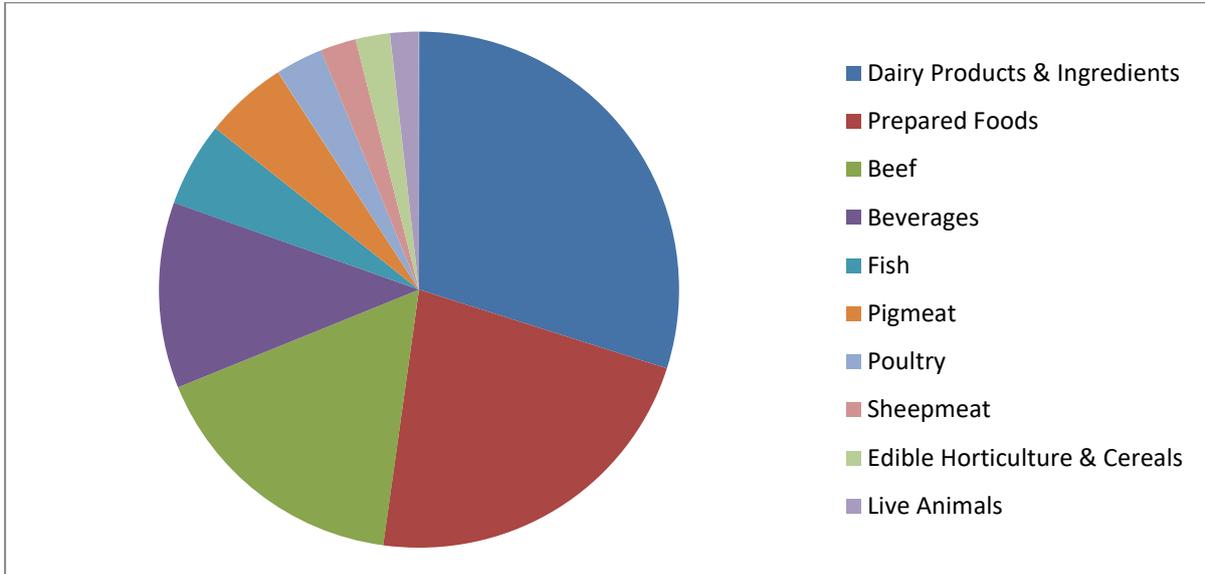
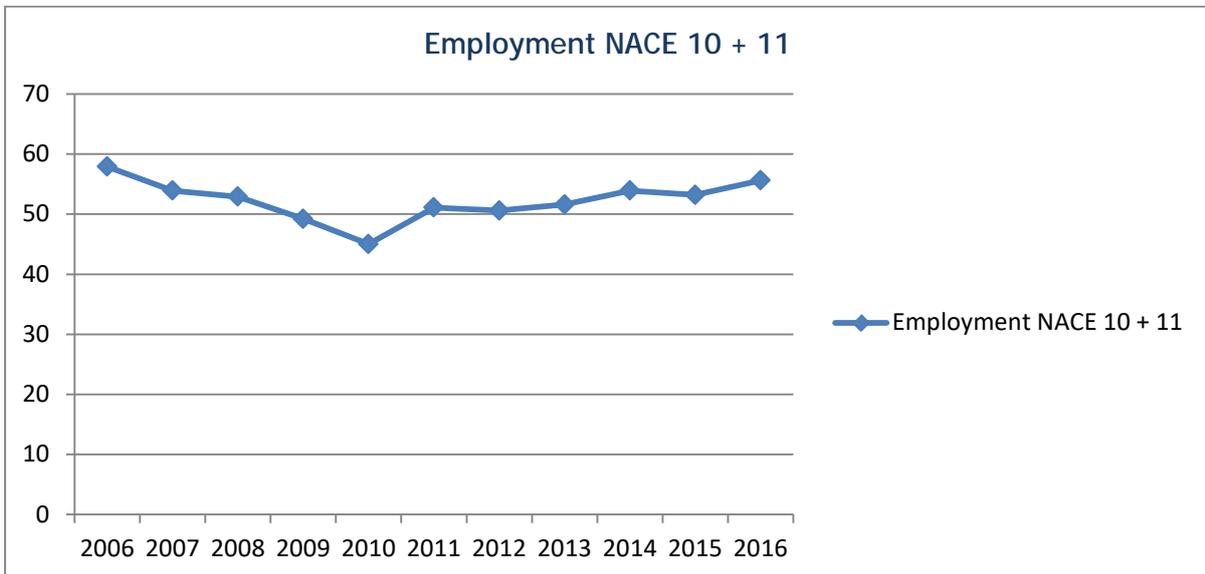


Table 2: Food & Drink Exports by Sector, Bord Bia



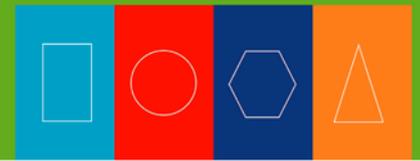
The Food and drink sector currently employs almost 56,000 people, according to the CSO Quarterly National Household Survey, indicating an almost full recovery to pre-recession levels.<sup>4</sup> Gross Value Added for the sector is approximately 5% of the total for the economy.<sup>5</sup>

Table 3: Employment in the Food & Drink sector 2006-16, CSO



<sup>4</sup> CSO QNHS NACE 10 + 11: Manufacture of Food Products and Manufacture of Beverages, not including Agriculture, Forestry and Fishing

<sup>5</sup> CSO National Income and Expenditure



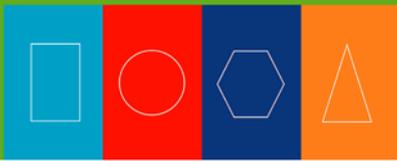
Beyond this, Food Wise 2025 is projecting significant growth over the coming years, with a target of 85% exports growth to €19 billion by 2025, as well as the creation of 23,000 extra jobs over the period. The Strategy also projects a 65% increase in primary production to €10 billion and a 70% increase in value added to more than €13 billion. Achieving this, however, is contingent, among other things, on addressing the skills needs in the sector.

## 1.2 Summary of 2009 report and recommendations

The 2009 EGFSN report on Future Skills Needs in the Food & Beverage sector presented detailed research into the sector in general and its economic context, as well as identifying key skills needs, and making recommendations to resolve these issues. The report looked at the period since a previous report on the sector, published in 2003, as well as focussing on the future needs of the sector.

Seven skills gaps, or thematic areas for consideration, were identified in 2009.

- (1) **Internationalisation** Companies in the sector were becoming aware of opportunities in emerging markets. To meet these challenges, developing further skills in international trade and logistics would be important, along with multi-cultural and multi-lingual skills. Specifically, customer management, key account management, international trade and supply management, were identified as necessary skills in this context.
- (2) **Innovation** A need to improve New Product Development skills, and the identification and interpretation of consumer insights, were identified. It was also seen as essential to develop increased absorptive capacity so that firms could benefit fully from available research. The specific skill-gaps identified were: consumer insight generation and interpretation, new product concepts and validation, portfolio management, packaging technology and design engineering.
- (3) **Operative and Supervisory Cohort** The need to move towards the “de-layering” and merging of roles was beginning to be seen as beneficial, and some of this new clarity is being developed through lean manufacturing programmes. Also required in many areas are basic literacy, numeracy and IT skills.
- (4) **Lean Operations** The 2009 report found that a number of companies have engaged in lean and world-class manufacturing since 2003. This remained a challenge, however, and was seen as a long-term agenda. It was necessary for companies to recognise the need for lean skills development at all levels.
- (5) **Supply Chain Management** This is a focus on customer requirements and standards, reducing inventory levels, and managing working capital more effectively. Again, these skills must be embedded into the firm at all levels.
- (6) **Leadership.** Leadership needed to become both more strategic and more engaged with the workforce. A key aspect is also succession planning, which requires long-term thinking about the future of the enterprise and the development of those who will lead it in the future.



(7) **Financial & Commercial Acumen** This is important across all levels and functions of the business. Many firms remain siloed, with those working in each silo often unaware of the financial impact they are having on the firm as a whole. There is a twin need, therefore, both for more integrated firm structures (the de-layering and merging of roles mentioned above) as well as a greater financial acumen and awareness across a broader range of staff and functions.

The report also included nine recommendations. The recommendations in summary form and the Bodies responsible for their implementation set out were:

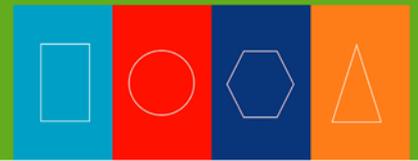
- (1) Establish a coordination forum between public bodies, HEIs and industry. (DAFM)
- (2) (a) Upskill operatives and supervisors; (In practice this was taken forward by the ETBs (**Skills for Work**), **Skillnets** and **SOLAS**) (b) Establish a Technical Operative Accreditation Programme. (The **Taste 4 Success Skillnet** was established)
- (3) Develop 'Craft Accreditations' for operatives (e.g., deboning, chocolatiers, cheese-making). (In practice this was taken forward through the **Skillnets (Taste 4 Success and Rural Food)**)
- (4) Tailor EI's Supply Chain Management (SCM) training for the food sector. (**Enterprise Ireland**)
- (5) Pilot the development of Supply Partner Networks, making the value-chain more efficient through collaboration. (**Bord Bia** progressed this recommendation)
- (6) Develop a pilot 'International Graduate Marketing and Management Programme' for SMEs. (In practice there were a number of initiatives by **Bord Bia, EI, FDII and DIT**)
- (7) Tailor EI's 'Leadership 4 Growth' programme for the food sector. (EI progressed this recommendation)
- (8) Target middle management with programmes such as EI's 'Transform Programme'. (EI progressed this recommendation)
- (9) Develop modularised training to improve the financial acumen of line managers and functional heads. (EI, **Bord Bia, Teagasc** responsible in these areas)

Substantial progress has been made on virtually all of the recommendations, with monitoring updates conducted in 2013 and 2016 by the EGFSN. The one area that requires strengthened focus, as identified later in this review, is in relation to coordination.

### 1.3 Approach and recommendations in Food Wise 2025

Food Wise 2025 can be summarised under seven headings.

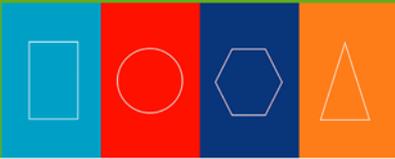
- (1) **International Context and the Opportunity for the Future** Food Wise sees the Irish food industry facing global growth and emerging markets, therefore substantial opportunities for growth and expansion. Products that offer convenience and health benefits are seen as particularly suited to this new and expanding environment, and a focus on value-added is



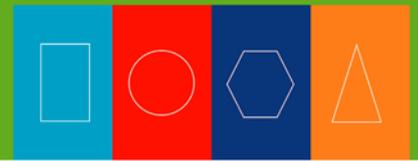
essential. Exports are targeted to grow by €19bn, or 85%, up to 2025; Gross Value Added to grow by 79%; and 23,000 jobs are projected to be created.

- (2) **Sustainability** Food Wise 2025 is centrally concerned with ensuring that current growth is not achieved at the expense of future growth, and the equal importance of social, economic and environmental development must be emphasised throughout the sector. Sustainability must become embedded and the notion that economic competitiveness and environmental sustainability are equal and complementary needs to be embedded at all levels.
- (3) **Delivering Growth** Cutting across many sub-sectors and specific recommendations, Food Wise sets out four key developments necessary to underpin growth: (a) the attraction, retention and development (including training) of talent; (b) market development that is consumer-insight driven; (c) productivity improvement driven by innovation and adoption of technology; and (d) a focus on value-added, especially at primary production level.
- (4) **Human Capital** (a) If it is to realise the growth opportunities that exist, the sector as a whole must invest in people, commit to knowledge transfer, and become better at attracting people with the right skills into both existing and emerging roles. There are now also interactions between the food sector and high-tech sectors that would not have been thought possible five years ago, providing even more space for growth. (b) At producer level, new technologies must be adopted, and both financial management and knowledge transfer skills must be built up. (c) At processing level, latest technologies need to be applied; financial management, marketing, R&D and technology absorption techniques must be learned.
- (5) **Innovation** While a wide range of high quality research is delivered by a number of State Agencies, Food Wise identifies two key gaps: (i) translating research into commercial products, and (ii) the absorptive capacity of SMEs to benefit from new research and innovation. To solve this it recommends an increased focus on consumer demands and insights. And in this context, Food Wise recommended the development of a Centre for Consumer Insight, which has now been established by Bord Bia.
- (6) **Market Development** To benefit from the significant opportunities presented by global markets, Irish producers must better understand the needs and requirements of consumers in these markets. Thus again there must be a greater focus on consumer insights and consumer needs. There is also an opportunity for collaboration between the promotion of Ireland as a tourist destination and as a new source of food products.
- (7) **Competitiveness** As a small, open economy, Ireland's reliance on exports to drive growth and job creation means that competitiveness must be central to our thinking throughout the production process and across the sector. Thus the adoption of technology and processes, as well as investment in human capital, to drive productivity improvements, becomes even more essential.

Food Wise makes 51 recommendations about Human Capital: at producer level (11), knowledge transfer (15), agri-food companies (13), marketing (7), health & safety (3), and languages (2).



This study builds on the above reports to identify the skill- needs and training needs that still exist and require continuing work to resolve.



## 2 Methodology

### 2.1 Literature Review

As set out above, our point of departure is the 2009 report of the Expert Group on Future Skills Needs on the Food and Beverage Sector. The report made nine recommendations. Progress against these recommendations was assessed internally by the EGFSN secretariat in 2013, and this was used as a basis for examining overall progress between 2009 and 2016. Progress against the 2009 recommendations was updated again as part of the current study.

In parallel, Food Wise 2025, published in 2015, sets out 51 recommendations to improve Human Capital in the sector. These are monitored quarterly by the Department of Agriculture, Food and the Marine.

### 2.2 Progress Update

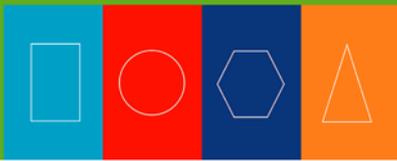
Building on the information in these reports, the EGFSN recommendations and progress made were discussed with the key actors responsible for delivering them, seeking both a progress report and indications of both continuing gaps and new opportunities that may have arisen since the last review.

### 2.3 Interviews

Following on from the progress update, a broad range of public and private sector actors were interviewed to identify current skill needs and training provision as well as how this could be improved, going forward.

### 2.4 Workshop

DAFM, in conjunction with the EGFSN secretariat, organised a one-day workshop and discussion forum with a wide range of public and private actors with a knowledge of skills issues in the sector. The outcomes from the interviews and workshop are summarised below. More than 45 stakeholders from all of the relevant public bodies, from industry and unions, attended. The strongest feedback from the day was that a similar meeting should be held at least once or twice a year to facilitate better communication between the various actors, and as a basis for more coordinated interventions.



## 3 Public Sector Engagement with the Food and Drink Sector

There is a range of agencies, offices and bodies, under four government departments, that provide support, grant-aid, training and education to the sector. While the quantity of support appears to be substantial, the coherence of that support remains in question in the minds of many stakeholders: more coordination is needed to properly understand the impact of the many inputs to skills development in the sector, as well as how these supports might be most effectively and efficiently allocated.

The main Public Bodies providing inputs into the sector fall mainly under four Government Departments: (1) The Department of Agriculture, Food and the Marine; (2) The Department of Education and Skills; (3) The Department of Jobs, Enterprise and Innovation; and (4) The Department of Social Protection. These Public Bodies are described below.

### 3.1 Department of Agriculture, Food and the Marine

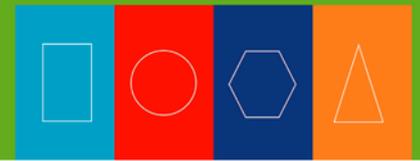
#### 3.1.1 Teagasc

Teagasc, the Agriculture and Food Development Authority, provides research, advice and training to the agriculture and food industry. The organisation is committed to supporting science-based innovation and the delivery of services to the Irish food sector. Teagasc provides research and specialist commercial services to a range of clients extending from multinational subsidiaries based in Ireland to Irish international food companies, small and medium sized enterprises (SMEs) and food entrepreneurs.

The extensive research programme, focusing on food research of relevance to the industry, is financed through core funding and competitive funding from the Department of Agriculture Food and the Marine, Science Foundation Ireland and EU funding programmes and involves collaborations with experts in Irish and international universities and organisations.

In addition to industry-focused 'public good' research, Teagasc actively engages on a one-to-one basis with food companies in both collaborative and contract research and the provision of specialist services such as product development, testing and analysis, training, auditing and consultancy. The food development pilot plants at Teagasc Food Research Centres in Ashtown, Dublin and Moorepark, Cork are critical anchors in the innovation process and delivery of applied research and services to the food industry.

The Teagasc Food Innovation Gateways initiative allows the food industry to engage with Teagasc more easily, to exploit opportunities arising from research outputs and to access know-how,



expertise and infrastructure in a more efficient manner. As part of the initiative Teagasc have developed a Food Technology Portfolio which is showcased at interactive industry Gateways events biannually.

Teagasc works closely with national food regulatory authorities and development agencies and delivers joint programmes with these agencies. **Food Works** is an accelerator programme where Teagasc works in partnership with Enterprise Ireland and Bord Bia to develop the next generation of scalable and export-driven Irish food businesses. To date Food Works has helped more than 60 Irish food entrepreneurs scale their businesses.

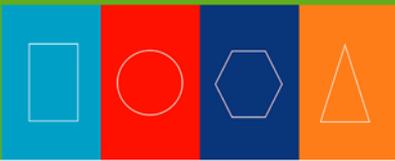
Ireland's Technology Centres are collaborative entities established and led by industry. They are joint initiatives between Enterprise Ireland and IDA Ireland allowing Irish companies and multinationals to work together and are resourced by highly qualified researchers who are empowered to undertake market focused strategic R&D for the benefit of industry. Teagasc is currently leading the Irish Meat Technology Centre and plays a critical role in Food for Health Ireland and the Dairy Processing Technology Centre.

### 3.1.2 Bord Bia

Bord Bia is responsible for the marketing of Irish food and drink at home and abroad. The agency continues to build on a number of programmes, including: **Origin Green**, aiming for a fully sustainable approach to food production; the **Quality Assurance** schemes focusing on the production of top quality food in a sustainable manner; and the **Brand Forum**, helping Irish food companies develop and grow their brands through workshops, events and media. **Food Alert** provides the latest research, and **Bord Bia Vantage** shows companies how they can get support when developing new products or thinking about exporting for the first time, for example. The **Food Works** programme is run in conjunction with Enterprise Ireland and Teagasc, supporting businesses with export ambitions.

The International Marketing and Management Programme was launched in 2009, but has moved beyond the pilot stage and is now established as the '**Fellowship Programme**'. In 2011 Bord Bia (In partnership with IBEC and DIT) developed and launched a **Food Export Graduate Programme** now known as the **Global Graduate Programme** involving graduates working for Irish food and drink companies in export markets over 18 months. The programme has grown year on year and now sees some 27 graduates work across 20/30 Irish Food and Drinks Companies. The Programme, delivered in partnership with Ibec & Dublin Institute of Technology (DIT), is designed to equip Irish companies with the necessary tools to reach their export sales potential in global markets.

The **Origin Green Ambassador Programme** was established and launched in 2013. Its aim is to attract talented and driven industry focused candidates with 5+yrs market experience to embark on a 24mth executive development programme, and focuses on emphasising the area of sustainability



and increasing awareness across companies on an international scale. The Diploma in Business Sustainability is designed to enhance industry executives' ability to lead and influence change for sustainability.

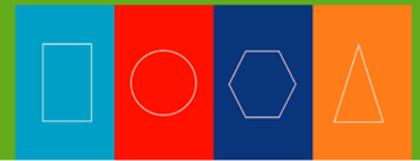
### 3.1.3 BIM

Bord Iascaigh Mhara helps to develop the Irish Seafood Industry by providing advice, grant-aid, training and technology services across the seafood industry, which includes the Irish catching, fish farming and seafood processing sectors. The agency provides advice on business development, retail and food service support, and process capability and efficiency, as well as promoting careers in the industry and giving advice on sustainable practice and new opportunities, including responsible fishing and farming practices, and implementing an environmental management system.

## 3.2 Department of Education and Skills

The National Skills Strategy, published in 2016, proposes six over-arching Objectives, under which Actions are grouped. Below is a snap-shot of the Objectives and Actions in the report.

- (1) Education and training providers will place a stronger focus on providing skills development opportunities that are relevant to the needs of learners, society and the economy.
- (2) Employers will participate in the development of skills and make effective use of skills in their organisations to improve productivity and competitiveness.
- (3) The quality of teaching and learning at all stages of education and training will be continually enhanced and evaluated.
- (4) People across Ireland will engage more in lifelong learning.
- (5) There will be a specific focus on active inclusion to support participation in education and training and the labour market.
- (6) An increase in the supply of skills to the labour market will be supported.



### 3.2.1 Solas

Operating under the aegis of the Department of Education and Skills, SOLAS was established in 2013 as the Further Education and Training (FET) authority, and in conjunction with the sixteen Education and Training Boards is responsible for the integration, co-ordination and funding of further education and training that is responsive to the needs of learners and those of a changing economy. Each year over 300,000 beneficiaries in Ireland participate in a range of high quality further education and training programmes, co-ordinated and supported by SOLAS, leading to new opportunities in further and higher education and in employment. Published in 2014<sup>6</sup> by SOLAS, the FET Strategy 2014-19 sets out a roadmap and implementation plan to realise the vision of a world class integrated system of further education and training.

In 2016, SOLAS published the third annual service plan for the FET sector which is available at <http://www.solas.ie/SolasPdfLibrary/FET%20Services%20Plan%202016.pdf> and sets out in detail information on 2016 FET provision across the sixteen ETBs. Under the service planning process, SOLAS and ETBs work together to produce annual service plans that are informed by national policies and strategies and are grounded in analysis of local skills demand and labour supply.

SOLAS also has responsibility for the Statutory **Apprenticeship** system. A menu of new Apprenticeship courses is being developed; up to 25 are currently being developed.<sup>7</sup>

### 3.2.2 ETBI

ETBI is the national representative association for Ireland's sixteen Education and Training Boards (ETBs). The ETBs and ETBI were established on 1<sup>st</sup> July 2013 and were formerly known as VECs and IVEA respectively. ETBs manage and operate second-level schools, further education colleges, multi-faith community national schools and a range of adult and further education centres delivering education and training programmes. They provide further education and training to over 200,000 adults annually, much of this targeting disadvantage, those with low basic skills and those seeking a second chance at education and training.

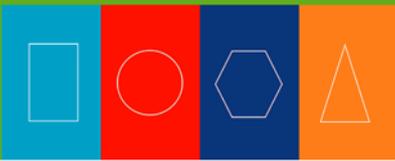
The ETBs delivers **Youthreach**, assisting more than 3,000 early school-leavers; the **Back to Education Initiative** offers part-time education to more than 30,000 people who have not yet reached Leaving Cert level; **Skills for Work** is a national programme whose aim is to provide employees with skills training that meets the basic demands of the workplace; and **adult literacy programmes** cater for over 40,000 people across the country.

There are now 16 ETBs around the country, responsible for the delivery of all Further Education and Training. DSP's **Pathways to Work**, via Intreo, can point people towards opportunities to take up training and transfer from job-seeker's allowance to a payment by SOLAS while undertaking the

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<sup>6</sup> <http://www.solas.ie/SolasPdfLibrary/FETStrategy2014-2019.pdf>

<sup>7</sup> <http://www.apprenticeshipcouncil.ie/who.aspx>



training. FET is progressively providing for more skills development, and it is necessary to anticipate the skills needs of the future in order to set up the relevant courses.

### 3.2.3 Skillnets

Skillnets supports and works with businesses in Ireland, and their employees, to address their current and future skills needs. It provides high-quality, subsidised training and development through over 60 learning networks. Each Skillnets learning network is a group of companies from the same sector or region, with similar training needs.

Over 12,500 companies in Ireland, predominantly SMEs, were members of a Skillnets network last year, and over 42,000 employees in Ireland availed of the training programmes the networks provided. Skillnets also provide training to the unemployed. Training courses are generally focussed on areas where businesses have identified skills shortages and have served the dual purpose of providing businesses with a valuable pipeline of trained staff, as well as helping a significant number of job-seekers to progress to employment.

In this project inputs have been received from the six main Skillnets networks operating within the Food & Drink sector: Taste 4 Success Skillnet, Rural Food Skillnet, Food & Drinks Industry Ireland (FDII) Skillnet, National Organic Training Skillnet (NOTS), ICOS Skillnet and ISME Skillnet.

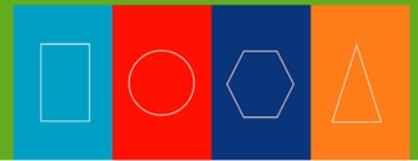
Skillnets is actively supported and guided by national employer and employee bodies such as Ibec, Small Firms Association (SFA), Construction Industry Federation (CIF), Chambers Ireland and the Irish Congress of Trade Unions (ICTU). Skillnets published their Statement of Strategy 2016-2019 in 2016, which focuses on training excellence and effectiveness, the supply of future skills, and increasing employer participation in training to sustain national competitiveness through the upskilling of those in employment.

### 3.2.4 HEA

The HEA has responsibility for the governance and regulation of the higher education institutions. Its objective is to develop a strategy for higher education that will lead to a coherent and responsive system of institutions, responsive to the social, cultural and economic development of Ireland. The HEA funds 26 Higher Education Institutions, which include the Universities and Institutes of Technology.

Springboard+ <https://springboardcourses.ie/>

Springboard, which is managed by the Higher Education Authority (HEA) on behalf of the Department of Education, began in 2011 as part of the Government's Jobs Initiative. It complements the core State-funded education and training system and provides free upskilling and reskilling higher education opportunities in areas of identified skills need. Springboard+ is co-funded by the Irish government through the National Training Fund and the European Social Fund as



part of the ESF programme for employability, inclusion and learning 2014-2020. The initiative's primary target group is unemployed people with a previous history of employment. Springboard courses and the ICT skills conversion programme are now run as a joint initiative under the banner brand Springboard+. 5,825 places were provided on 180 courses in 36 public and private higher education institutions under Springboard+ 2016. It is expected that Springboard+ 2017 will be launched in May/June 2017.

### 3.2.5 IoTs and Universities

There are 7 Universities and 14 Institutes of Technology across the country. All collaborate with business to varying degrees in the development of their courses and research agendas. There is currently no central source for accessing all of these collaboration opportunities in one place.

### 3.2.6 Technology Centres

One initiative designed to bring research and innovation together is the Technology Centres programme, run by Enterprise Ireland. There are 15 Technology Centres, located in Universities and Institutes of Technology across the country. Three are specifically focussed on the food industry (FHI, DPTC and MTC) and others have technology and services of interest to food companies (IMR, CeDar IVI). Information on these centres and 32 other research centres of scale can be found in this [Directory](#)<sup>8</sup> or on the Knowledge Transfer Ireland ([KTI](#))<sup>9</sup> website.

### 3.2.7 QQI

QQI (Quality and Qualifications Ireland) is a state agency established by the Qualifications and Quality Assurance (Education and Training) Act 2012. Its functions include those previously carried out by the Further Education and Training Awards Council (FETAC); the Higher Education and Training Awards Council (HETAC); the Irish Universities Quality Board (IUQB) and the National Qualifications Authority of Ireland (NQAI).

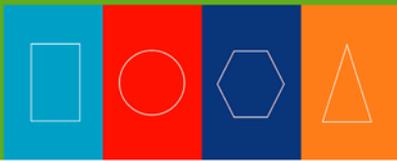
QQI's existing functions fall into two broad categories, i.e. (1) Qualifications, Standards, Awards, Recognition and (2) Quality Assurance.

With regard to the first set of functions, QQI are responsible for maintaining the ten-level NFO (National Framework of Qualifications). However, QQI are also an awarding body and set standards for awards they make in the NFO. QQI also validate education and training programmes, and make extensive awards in the FET sector including in the Education and Training Boards. Additionally, QQI also make awards in higher education to certain private providers. With regard to the recognition function, QQI provide advice on recognition of foreign qualifications in Ireland and on the recognition of Irish qualifications abroad.

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<sup>8</sup> <https://enterprise-ireland.com/en/research-innovation/companies/collaborate-with-companies-research-institutes/technology-centres.html>

<sup>9</sup> <http://www.knowledgetransferireland.com/>



In the area of quality assurance, QQI are responsible for reviewing the effectiveness of quality assurance in further and higher education and training providers in Ireland, which includes the universities, institutes of technology, Education and Training Boards and providers in the private further and higher education and training sectors (availing of QQI awards). QQI publish the outcomes of these external reviews on their website.

### 3.2.8 Regional Skills Fora

The nine Regional Skills Fora were set up by the Department of Education and Skills under its 2016 National Skills Strategy. The Network is designed to provide an opportunity for employers and the education and training system to work together more closely leading to better alignment between business needs and training provision and a more efficient use of existing resources.

### 3.2.9 NALA

Although not a Public Service Body, NALA provides awareness of literacy and numeracy issues and referral to programmes available to support people wishing to develop their basic skills, the majority of which operate through the ETBs. NALA also operates a free online learning platform [www.writeon.ie](http://www.writeon.ie) which offers free accredited learning up to Level 3 on the NFO, as well as the option of recognition of prior learning. NALA has produced a guide for employers on how to best support literacy and numeracy issues in the workplace <http://bit.ly/1s9Fuj3>.

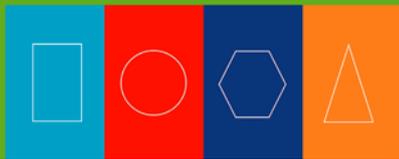
## 3.3 Department of Jobs, Enterprise and Innovation

### 3.3.1 Enterprise Ireland

Enterprise Ireland has identified several priority areas for leadership and management development for this sector. Some of the key areas of focus are: (1) Building strategic leadership capability and ambition to scale; (2) supporting companies to build appropriate management structures and systems for growth, including the development of management teams, appropriate corporate governance structures and succession planning; (3) building innovation capability, including the technical capacity to absorb new research and innovation from research bodies; (4) accessing and attracting third level graduates with the key skills to support companies to scale; and (5) building international sales & marketing capability.

A range of Enterprise Ireland leadership and management development programmes have been integral to the delivery of the recommendations of the Expert Group's 2009 report, including:

- Leadership 4 Growth
- Strategic Leadership 4 CFOs Programme;
- Management 4 Growth
- Supplier Development Programme, run with Bord Bia and Super Valu
- International Selling Programme



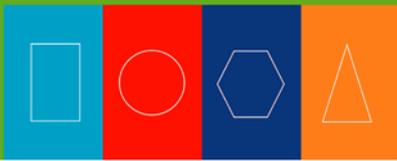
- Excel at Export Selling suite of short programmes
- UCC Diploma in Management Practice
- Graduate Business Growth Initiative
- Lean Business offer: Lean Start, Lean Plus and Lean Transform

### 3.3.2 Employment Permits Unit, DJEI

The State's general policy is to promote the sourcing of labour and skills needs from within the workforce of the State and other European Economic Area (EEA) states. Where specific skills prove difficult to source within the State and EEA, an employment permit may be sought by an employer to hire a non-EEA national. Employment permit policy is part of the response to addressing skills deficits which exist and are likely to continue into the medium term. It is not intended over the longer term to act as a substitute for meeting the challenge of up-skilling Ireland's resident workforce, with an emphasis on the process of lifelong learning, and on maximising the potential of EEA nationals to fill skills deficits.

The employment permits system will continue to be responsive to changes in economic circumstances and labour market conditions. In order to adequately control the flow of skilled economic migrants into the country, DJEI continually reviews the highly skilled and ineligible lists of employments on a regular basis, in accordance with the changing needs of the labour market.

In 2014, the meat processing sector reported that it was experiencing critical shortages in skilled meat de-boners. Having explored all the factors arising on an inter-Departmental basis, in May 2015 meat de-boners were temporarily removed from the ineligible list and the number of permits available was capped initially at 200. It was critical to ensure that action was taken to provide for an uninterrupted flow from the domestic and EEA economies of high quality specialist skills in de-boning. Thus, an additional 160 permits was also assured should progress be reported by the Department of Agriculture, Food and the Marine on commitments given by the industry to training/upskilling and the creation of additional employments. The sector has reported progress on the roll out of Skillnets training and on additional job creations on foot of the 194 permits granted to end Feb 2017.



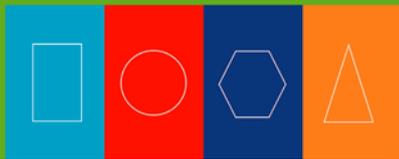
## 3.4 Department of Social Protection

### 3.4.1 Intreo

The Department of Social Protection's Intreo service is a single point of contact for all employment and income supports. Through the nationwide network of offices, the Intreo service offers practical, tailored employment services and supports for jobseekers and employers alike.

Intreo provides advice on job seeking, information on vacancies, upskilling opportunities and income supports to jobseekers.

For employers, Intreo can support recruitment campaigns - raise awareness of jobs available, and source and refer suitably qualified candidates. The Intreo service can also work with employers and education and training providers to upskill jobseekers to meet future recruitment needs. In addition, they provide advice on employment initiatives and financial supports available.



## 4 Emerging Issues

This chapter summarises a range of issues that emerged during the research for this review with public and private sector stakeholders. There is some continuity between the subjects that arose during the current consultation and the outcomes of the 2009 report. While progress has been made, many issues require ongoing attention.

A summary of the issues raised by stakeholders is presented below.

### 4.1 General Issues - Exchange Rates and Reputation

Brexit has led to a depreciation of Sterling resulting in price pressures for exports of food and drinks to the UK and indeed some element of increased competition from sterling sourced imports. With the advent of Brexit, therefore, competitiveness has never been more important; and skills feed hugely into competitiveness. Food companies are also finding it increasingly difficult to recruit; other sectors can pay more; thus there is an upward pressure on labour costs. Languages are also important, as well as experience in other countries. This will likely be increasingly important with Brexit as the sector diversifies exports to other markets.

Sustainability is also an issue. Origin Green<sup>10</sup>, Ireland's national sustainability programme, is considered to be good but more needs to be done: there is not yet enough measurement of what is going on at company and farm level, such that all relevant factors can be monitored. Until this can be achieved, there remains a risk to Ireland's reputation were something to go wrong. Sometimes international customers will conduct (sustainability) audits, and companies need to be able to respond positively to this.

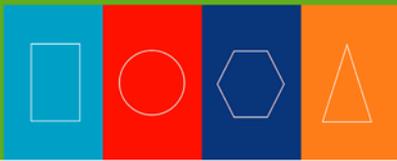
### 4.2 Operations and Primary Production

**Labour productivity** is central. Primary production is characterised by very low margins across the board, sometimes reported to be as low as 1%. Brexit, and the depreciation of Sterling, have put further pressure on margins. This is set to continue for some time and is not expected to return to its previous state in the foreseeable future. These issues are more pressing in the meat sector, where low wages and difficult conditions make it hard to get Irish workers to take up entry-level jobs or training programmes.

There is a recognised need to continue to diversify markets and improve productivity to respond to this. Increasing productivity is not just about new systems and processes, but also about culture change to focus on making the changes necessary to improve productivity, such as adopting lean approaches or breaking into new markets.

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<sup>10</sup> <http://www.origingreen.ie/>



**Attracting employees to the sector** in the first place is an issue. Short-term and unclear career paths make it difficult for the sector to attract graduates and retain existing staff. For foreign workers, matching qualifications from other countries to the equivalent Irish standard is often difficult.

The food sector needs better branding to be attractive to potential employees. The issue is even harder for small companies who do not have the international reach that graduates want to avail of. Smaller companies may also need to take on part-time staff with certain skills while they are growing.

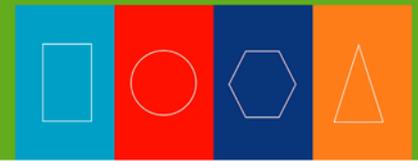
Managers, particularly in SMEs, need training on how to be better at identifying and managing skills needs. On a very practical level, they need to be prepared to release staff to attend training courses that are available. A clear and accredited career path needs to develop in order to attract new entrants and retain current staff. To solve literacy needs more quickly and effectively, literacy needs to be integrated into other courses; this makes it more likely that operatives will attend.

**Retention and turnover of staff.** How employees are paid, treated and provided with a clear career path, are all key issues that need to be addressed by many companies in the sector. There is competition in the jobs market for the best talent, and the food sector needs to be able to attract the best, offering competitive salaries as well as clear and appealing career paths. Also, it has been shown that the more training and employee development companies invest in, the lower is their staff turnover. Overall the sector needs to develop a culture of training up staff.

**Literacy and numeracy** and basic IT skills were considered still to be one of the main problems in this area. This is true for Irish workers, but particularly so for non-Irish workers, where language is often a big issue.

Skills for Work is run by the ETBs as a basic literacy, numeracy and IT skills training programme. Training is free and can be provided to employees anywhere in the country. The biggest difficulty currently being experienced in this area is employers not releasing staff to receive the training. This is even more important in the meat plants, and other low-level operations sites, where a lot of foreign workers have been taken on in recent years; many of these employees have very little English, and this will clearly present a barrier to their progress both at work and more generally. Sometimes the need for literacy and numeracy training does not present itself because people are embarrassed to admit they need it. It can be that courses couched in different terms, such as “Editing and Writing” would attract greater numbers.

Within the FET Strategy 2014-2019 a separate Literacy and Numeracy Strategy for adult learners is set out. Additionally, Skills For Work are running a number of Workplace Language Programmes designed specifically for the Food & Beverage sector and also Manufacturing companies such as meat processors, mushroom farms etc. Consideration may need to be given to how best to



incentivise further on-the-job training and making off-site courses more accessible, as well as to designing targeted programmes for continuous learning of existing operatives within specific companies to allow for access to training courses while reducing impacts on productivity.

**Food Operations: Hygiene, HACCP, Manual Handling, People Management.** There is a need for HACCP training for small businesses at an affordable price. Shelf-life testing and sensory analysis is being out-sourced. Further analysis of the necessary training in this space has not yet been worked out. It may be that the ETBs or Skillnets can fill the gap. However, there is an issue that the equipment for some of this training is very expensive; currently it is only available in UCC and CIT.

**Increasing numbers of apprenticeships** programmes for the sector are becoming available. A range of new Apprenticeship courses are being rolled out by DES and there is further potential for food and beverage industry participation<sup>11</sup>. FDII Skillnet has applied to the Apprenticeship Council in two categories: (1) Super-Operatives, and (2) Mechanical-Maintenance Technicians.

### 4.3 Middle Management

A big challenge when working with SMEs and micros is that they may be too small to have an internal HR department, thus lack the skills and understanding to articulate and address the skills needs that they know they face.

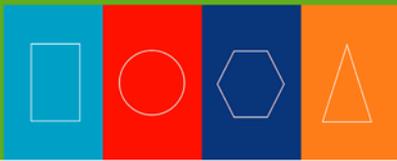
In small companies, operations often overlap senior management. Thus there may not initially be a recognisable middle management cohort that can, in the first place, take on the HR role that might then act as gateway for training and the identification of key roles.

**Succession planning** is an essential part of the long-term plan for any business: is the company ready with an individual or group that can step into the space left by the previous generation of managers?

Managers need to know how to deal with lean operations, supply-chain management, business strategy, and strategic finance. The first step is to recognise the need for these and other skills. One approach is professionalising how to identify skills needs, by providing the expertise from outside the firm to support their management decisions in the HR space. For example, Invest NI run “training needs analysis workshops” for owner-managers. The next step is to find the necessary training. There is, in fact, a wide array of sources of support, from Enterprise Ireland and the LEOs, Skillnets and ETBs, as well as the higher education institutions. Further to that, of course, is finding the time: recognising that life-long learning has really become a necessity.

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<sup>11</sup> <http://www.apprenticeshipcouncil.ie/who.aspx>



Middle managers may be college-educated professional managers or they may be individuals who have moved up the ranks from operational roles. In the latter case, literacy and numeracy may remain as issues, but it is even more difficult for such managers to admit this need, and again it is important for courses to be named diplomatically.

**Capability building** is also important. And, specifically, the **absorptive capacity** must be developed to take on board the results of research and use this to feed into the development of new and innovative products. A lot of research is made available; the key is to be able to translate this into usable information for the firm. And investment in enabling technologies as well as people is necessary.

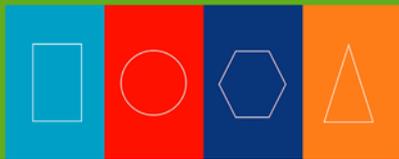
**Marketing skills** are also essential, including knowledge of countries and markets, as well as languages.

The feedback at the workshop convened as part of this review confirmed that firms in this sector need a step up in developing managerial talent in-house, so that when existing managers move on, there is good succession planning. Graduates need to see a career path in the food and drink sector. There is a need to focus more on soft skills, emotional intelligence, people management, etc., rather than on technical skills, which already exist. The group suggested that there are a lot of people on the live register with substantial managerial skills, but who need some technical training to enter this sector. Skillnets can help these people get the training they need.

At the workshop there was also consensus that companies need to encourage graduates with the right pay-scales and clear career-paths. Universities need to incorporate work-experience into courses so that graduates are better prepared for the work environment. Internships should be part of degree courses rather than post graduate courses but must have a structure with a “doing” element and feedback at the end of the internship.

Internships need to focus on technical skills while graduate programmes need to develop management skills. Fellowships need to be longer than six months so that the company can reap the benefits of training up the intern.

Similarly, participants at the workshop agreed that sales skills are essential for all businesses, but distribution can be difficult for micro firms, in particular. Some support may be needed to provide sales and distribution skills to micro firms, possibly on a shared / regional basis.



#### 4.4 Senior Management and Leadership

**Culture can be an issue with many companies**, impeding necessary change and modernisation. This is reported to be more the case in the meat sub-sector than others. These companies are slow to respond and change their approach to training and paying staff, lean processes, and innovation.

**Innovation is always essential.** But there is still under-investment across the board, particularly in the private sector; there are a lot of supports available from the public sector. It is important that new product ideas come from a good understanding of what the consumer wants. Bord Bia is looking into **consumer insights**, and Teagasc has done a 10-15 year foresight study. There is significant potential demand in the food and drinks area, in the view of Teagasc and Bord Bia.

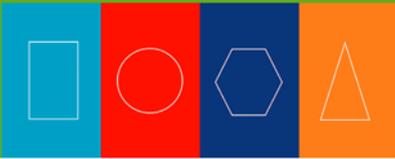
Large companies tend to have in-house R&D programmes, but SMEs mostly do not, so they need more support. What a company often needs is the 'processing know-how' to make a new product and keep ahead of the rest of the market for 3 to 4 years. Then there needs to be a pipe-line of products to replace the preceding ones as the rest of the market catches up.

**Technology** will play an increasing role in processing with a continued need for skills development at operative and supervisory levels. Being technology-literate is increasingly important at all levels in the operation. Advanced testing is also increasingly required and is often out-sourced to the UK and elsewhere. Ireland will need to increase its testing capacity in due course. In terms of route to market, technology can also be a disruptor, for example, by allowing producers to sell directly to customers via the internet, thereby improving margins.

Brexit also highlights the importance of diversifying to **New Markets** and the need for increased internationalisation, which requires, among other things, **marketing, selling and language skills**. It is important that students do not leave their languages behind in secondary school, but continue them through third level, in parallel with other studies. Food industry stakeholders view it as important that at second level students are aware that the languages they are learning will have real, practical benefit for their careers. Financial Instruments training will also be increasingly important in the context of Brexit.

From the workshop with industry participants the main skill needs identified were:

- (a) **Entrepreneurial Skills:** General business skills to take the initiative, negotiate, generate sales and solve problems.
- (b) **Procurement Skills:** There is a deficit of individuals with the skills to efficiently/effectively negotiate contracts.
- (c) **Language Skills/Intercultural Skills:** Considered a major skills need, particularly for a post-Brexit agri-food sector. Not just oral skills but the ability to adapt practices/behaviour based upon a customer/business partner's cultural background.



## 4.5 Coordination and Collaboration

There is a wide range of skills, training and education provision on offer across a range of public bodies and departments. From an employer perspective, the key identified need was to bring together and coordinate the totality of provision as it relates to skills and the support of the business sector in general.

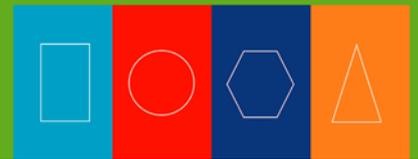
Some stakeholders suggested that **the process of stakeholder engagement involved in the carrying out of this report should be ongoing** and not end with a report and recommendations. They point to the value of communication between stakeholders and the importance of ongoing coordination. The national skills landscape has become a lot more complex; coordination will be important if we are to maintain competitiveness. Overall, there is perceived benefit from convening **an ongoing skills dialogue for the sector** with a rotating Chair between public and private sectors.

The Regional Skills Fora will act as a mechanism for Employers and the Further and Higher Education and Training system to work together in building the skills needs of their respective regions through sustainable engagement with all relevant stakeholders. The Skills Planning and Enterprise Engagement Unit in the Department of Education has responsibility for oversight of the work of the Fora as well as for implementation of the National Skills Strategy and the provision of a secretariat to the National Skills Council, when established. These are all new initiatives in the context of the national and regional skills architecture and will require time to bed down.

While there is a range of skills training and development supports available for businesses **there is an absence of a central place** where all available supports can be found, for the benefit of both firms and for training providers so they can fill gaps.

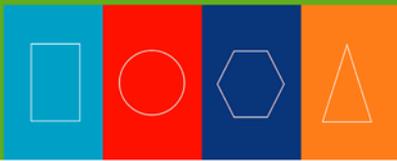
In relation to Skills for Work, the literacy and numeracy programme, it is not clear how this connects, nationally, with the Regional Skills Fora and Skillnets, for example. This needs to be examined further to identify potential synergies. However, in recent weeks workplace education networks have been established in a number of ETBs and the Skills for Work Regional Coordinator is part of this group. This is in response to the ETBs FET plan to promote workplace learning across all levels of QQI to companies in their catchment area.

The HEA has statutory responsibility under the Higher Education Authority Act 1971, for the governance and regulation of the higher education institutions and the higher education system. At an operational level, however, the Universities and IOTs have a lot of autonomy, which can make coordination of specific policy proposals difficult at times.



Two areas considered at the workshop where coordination and collaboration could be improved included:

- (1) Establishing a “One Stop Shop” approach, involving both public and private sectors on courses and programmes available to the sector. This could help in terms of raising awareness of all the training that is available, and in terms of better managing the image of the sector. Some of the existing programmes and organisations considered important in this regard were: Origin Green, the Bord Bia Fellowship Programme, Ibec Global Graduate Programme, Skillnets, the Apprenticeship Council, and the Regional Skills Fora.
- (2) Collaboration within the private sector. The workshop considered that employer branding could be improved for the sector overall and that peer learning for SMEs would be helpful in terms of learning from larger companies in terms of how they attract talent, for example. Companies might also collaborate on the development and delivery of graduate programmes.



## 5 Conclusion and Recommendations

### 5.1 Conclusion

The Food and Beverage manufacturing sector has grown strongly over the last five years and while the outlook overall is positive, the challenges of Brexit will be significant. This review of immediate skill needs does not set out to examine the impacts of Brexit in totality, but rather to understand the immediate skills needs of the sector. So while the review does not examine a possible worst case scenario, it is already clear that sterling depreciation has adversely affected the margins of some exporters to the UK. Certain sub-sectors, such as meat, and in particular the mushroom sector, have relatively low margins and are being hit harder as a consequence. Imports from the UK are also substantial on the Irish market and a weaker sterling will increase domestic competitive pressures.

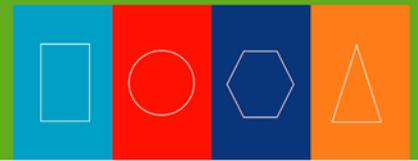
This review is focussed on immediate skills needs and training needs. Discussions and interviews with upwards of sixty stakeholders across both public and private sectors reveal some quite similar issues to those from the 2009 EGFSN report, Future Skills Needs of the Food and Beverage Sector. It seems clear that there are ongoing issues around numeracy and literacy at operational levels, along with tight margins, contributing to difficulties locating skilled staff in some sectors. Finding time for on-the-job training can be difficult for some companies.

Middle management remains an area where there is a development challenge. It is particularly difficult for SMEs, especially when they are quite small, to identify skill needs and training needs as due to size and management stretch, strategic management merges with operations and not enough time or attention is being paid to developing current managers into the leaders of the future.

As in most areas, employers are continually looking to hire staff that are work-ready in terms experience and are appropriately qualified. Internships and work placements are seen as important in this context. Similarly apprenticeships are viewed by employers as a good mechanism for ensuring staff are appropriately skilled and trained.

Foreign languages and international selling skills and experience are becoming increasingly important as the sector seeks to diversify export markets and grow sales.

While there is a wide range of public support and training provision available to the sector, at the firm level they may need to engage with a number of organisations to ensure they can meet their full skills development needs, such as with apprenticeships, ETBs, Skillnets, EI, universities and institutes of technology. It is important therefore that the industry representative bodies and firms themselves work closely with a range of education and training bodies, such as through the Regional



Skills Fora, to ensure the provision of a relevant and practical suite of programmes that will continue to support the industry into the future.

## 5.2 Recommendations

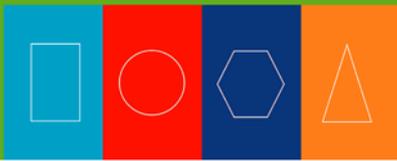
The following provides a summary of the recommendations emerging from the review.

### 5.2.1 Work-based Learning

1. With a focus on numeracy, literacy and basic ICT skills, consider how best to make further on-the-job training and off-site courses more accessible, for example integrating literacy into specific course content. Designing targeted programmes for continuous learning of existing operatives within specific companies would allow for access to training courses while reducing impact on productivity. **(Skillnets, SOLAS, ETBs, NALA, IBEC, ISME, Industry)**
2. Examine incentives in other countries for further supporting firms to increase their participation and investment in on-going training and skills development in the sector. **(DJEI/DES, IBEC, ISME, Industry)**
3. Providers and industry to examine how best to develop middle-management training and succession planning approaches for the sector. **(Enterprise Ireland, Skillnets, Industry)**

### 5.2.2 Internships, Mentoring & Apprenticeships

4. Work placements should be part of all undergraduate degree courses as well as post graduate courses. They must have a structure with a “doing” element and feedback at the end of the internship. Agri-food and beverage companies need to link to higher and further education institutions to take on participating students. **(HEA, HEIs, IBEC, ISME, Industry, Regional Skills Fora)**
5. Industry and Education and Training providers to consider developing a two year mentorship programme for SMEs to enable the development of talent internally within agri-food companies. **(EI, Skillnets, IBEC, ISME, Industry)**
6. Millennials: The food and drink sector to convene a millennials focus group in order to better understand how to attract and retain graduates in the sector. **(Bord Bia, IBEC, UCD, Industry)**
7. Accelerate the delivery of apprenticeships through the implementation of the Action Plan for the Expansion of Apprenticeship and Traineeships 2016-2020 and encourage more food and drink firms to join apprenticeship programmes. **(Apprenticeship Council, SOLAS, ETBI, HEA, DES, Ibec, ISME, Industry)**



### 5.2.3 Languages and International Selling

8. Language ability and international selling need to be part of graduate formation for entering the sector; language development should start at primary and progress through to third level. (DES, Bord Bia, Regional Skills Fora)
9. Examine how best to promote and support the industry for language training, and share good practice of on-site language development modules across occupations from operative to senior management. (DES, Bord Bia, IBEC, ISME, Industry)

### 5.2.4 Coordination

10. Convene an annual stakeholder forum of education and training providers and the food and beverage industry to address identified skill needs and assess priorities and progress on delivery. (DAFM, DJEI, RSFs)
11. Examine how best to establish a One Stop Shop website to provide information about training available for the sector. (DAFM)
12. Monitor implementation of the actions outlined in this Report and complete a more detailed assessment of supply and demand needs for the sector as part of the work of the EGFSN's overall skills needs assessment and of the impacts of Brexit in due course. (EGFSN)



Expert Group on Future Skills Needs

c/o Department of Jobs, Enterprise and Innovation  
Kildare Street  
Dublin 2, Ireland

Tel: +353 1 631 2881

Email: [info@skillsireland.ie](mailto:info@skillsireland.ie)

[www.skillsireland.ie](http://www.skillsireland.ie)