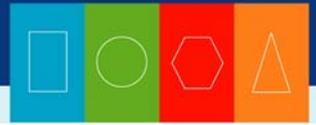
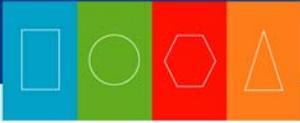


The Expert Group on Future Skills Needs

Statement of Activity 2009

April 2010





Foreword

Future recovery largely depends on capitalising on the full potential of the people that live and work in Ireland, and this requires an education and training system that enables our workforce to make the most of enterprise and employment opportunities as they arise. The skills possessed by the labour force will underpin growth in productivity in Ireland's exporting sectors, on which our long term economic prosperity depends. However, recent rapid increases in unemployment, and the growing threat of long-term unemployment, serves to emphasise the urgency with which we must upskill and reskill those who are made redundant. Both the demand for and supply of skills has changed significantly over the past two years; it is important that the education and training infrastructure is sufficiently flexible to adapt to current and future skills needs.



Continuity in our approach is also important. In the current economic climate, investment in education and training at all levels remains a priority. Investment must continue to target both those with the lowest level of skills who will otherwise be left behind and excluded from the labour force, and also those with the highest levels of skill who have the greatest potential to innovate and to drive the Irish economy forward.

Over the past 12 months, the Expert Group has monitored skills developments at all levels of the skills spectrum. In consultation with companies in Ireland we addressed the future skills needs of two key sectors - the locally traded Wholesale and Retail Sector employs over a quarter of a million people and the key exports sector Food and Drinks employs about 50,000 people directly, 60,000 indirect jobs and some 120,000 farmers.

We also produced a report on the relevance and application of Creativity, Design and Innovation Skills across a range of enterprises and occupations. This showed the need to foster the kind of creative and innovative ways of working that we need in the economy today. In addition, we have continued to monitor key labour market and skills trends and published our findings in the National Skills Bulletin and Trends in Training and Education Output.

These varied publications recognise the importance of all sectors of the Irish economy - not only our key exporting sectors, but also non-exporting sectors which employ a high number of people domestically.



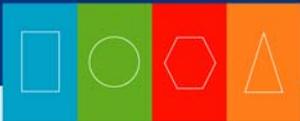
As noted above, we have seen a steep rise in unemployment over the last 18 months. The shift in emphasis from in-employment training towards education and training for the unemployed (through, for example, the development of Labour Market Activation initiatives) is a practical step in addressing this challenge. To ensure such initiatives are effective, labour market activation programmes should focus on delivering skills that are relevant to enterprise and thus improve the employability of individuals. The most successful programmes will be those that are demand-led, based on employer and employee-identified training needs and aligned with national labour market policy objectives, with a focus on training for results. Limited exchequer resources demand efficient delivery of training and upskilling programmes. Therefore, exploring new and more efficient methods of programme delivery will be crucial.

To assist in elements of the Activation Measures the Expert Group provided material on future skills needs to guide the provision of the extra higher education places made available to the unemployed during 2009.

Looking to the future, specific sectoral skills, as well as 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. Improved mathematical achievement, increasingly important across all sectors and occupations, can improve Ireland's competitiveness and each individual's ability to participate and drive today's globalised and technological society.

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 analysis support that they provide to the group.

Una Halligan
Chairperson
EGFSN



Members of the Expert Group on Future Skills Needs

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¹ Appointed as Chairperson of the Expert Skills on Future Skills Needs in March 2009

² Appointed February 2009

³ Appointed April 2009

⁴ Retired January 2010 and replaced by Terry Corcoran, FÁS

⁵ Retired October 2009 and replaced by Enda McDonnell, Enterprise Ireland

⁶ Replaced Fergal Costello, Higher Education Authority in February 2009



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 and activity in 2009, forthcoming work in 2010, and information on the group's research and analysis resources.

Activities of the Expert Group in 2009

Future Skills Requirements of the Food and Beverage Sector

The EGFSN Report, *Future Skills Requirements of the Food and Beverage Sector*, was published in November 2009. Among the aims of the report were:

- To 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;
- To identify any particular changes, either to the sector overall or within specific sub-sectors, to the extent that these may have a bearing on skills requirements; and
- Profile the current composition of those employed within the sector in terms of educational attainment, age, gender and nationality; and based on the findings of the research:
 - Assess what further action, if any, 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 proposed body/bodies to be charged with implementing each recommendation.



The food and beverage processing sector is a strategically important sector for the Irish economy; in Q1 2009, there were an estimated 47,176 people employed directly in the sector. The Gross Value Added (GVA) for the sector in 2007 was estimated at €6.9 billion - 4 percent of total national GVA. Beverages account for 25 percent of the sector's GVA, the meat sector 10 percent and dairy a further 8 percent. In 2008, the total value of exports was €8.2bn; an increase of €1.2bn since 2003. Bord Bia predicts that this will grow to €9.5bn by 2011.

Ensuring the continuing employability of the approximately 30,000 workers who have second-level or lower educational attainment is a priority, together with ensuring that the high-skilled requirements of the bio-processing and new product development aspects of the sector are being met. The key recommendations of this report can be summarised as follows:

- Establish an interagency, third level institute and industry forum to discuss and address the ongoing skills, training and development needs of the industry (Dept of Agriculture, Fisheries and Food);
- Develop and roll-out operative upskilling and technical accreditation programmes, as well as recognised and accredited craft accreditations for operatives (FÁS, with support from FETAC and NALA);
- Tailor and promote Enterprise Ireland's Supply Chain Management initiative and its Leadership4Growth programme, to the food sector (Enterprise Ireland);
- Pilot the development of supply partner networks comprising retailers (with Irish operations), fast moving consumer goods (FMCG), logistics and warehousing companies (Bord Bia);
- Develop a pilot international graduate marketing and management programme for SMEs (FÁS); and



- Develop bespoke modularised interventions to improve commercial acumen of line managers, functional heads and operatives (EI/Bord Bia/Teagasc).

The relevant stakeholders and parties have already begun to implement some of the recommendations. The forum envisaged in the report is being set up under the auspices of the Department of Agriculture, Fisheries and Food, and will meet for the first time in the second quarter of 2010 to review initial progress on implementation.

Skills in Creativity, Design and Innovation

This EGFSN report, published in November 2009, addresses Ireland's need for skills in creativity, design and innovation. Skills in these areas are key drivers of productivity improvement, and are considered integral to the Government's wider strategy for economic renewal, reflected in the plan *Building Ireland's Smart Economy - A Framework for Sustainable Economic Renewal*. 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, this report looks at cross-cutting skills that apply across occupations and across many industries. The report complements existing work by the EGFSN on specific sectors and occupations. It also builds on previous work on generic skills, upskilling and lifelong learning, all of which contribute to creativity and the capability to be innovative.

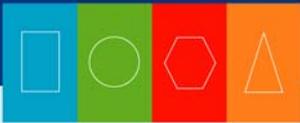


Specifically, this report takes the need for both skills in the specialist areas addressed by earlier reports, and for lifelong learning, as already established, and addresses:

- The complementary skills needed by people with specialist skills to enable them to be creative, and to perform effectively as innovators;
- The skills in design that are required, whether among professional designers, or among people from other specialisms;
- The contribution that other specialist skills in the arts, humanities and social sciences can make to creativity and innovation; and
- Further measures required to develop the skills required for innovation in the workplace.

The main measures the recommendations focus on are as follows:

- All Irish Higher Education Institutions should set objectives in developing creativity and capability to innovate among their students - this should be monitored and progress should be subject to frequent review;

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- Higher Education Institutions should make a major effort to break down the disconnect between Science, Engineering and Technology on one hand, and business disciplines on the other. While FETAC has improved matters significantly by requiring that courses include generic skills modules, there is a need to go further by specifying that these should be taught in a way that links tightly to the main subject matter of the course, and that teaching methods for at least some other modules on each course should be designed to promote creativity and innovative capability;
 - To assist Irish businesses in assessing their skills in creativity, design and innovation using the frameworks presented in this report, and material from other sources, and to help them to respond to opportunities and deficiencies that they identify, an audit tool for this purpose should be developed;
 - Skillnets and its stakeholders should place an increasing emphasis on funding networks that target skills in creativity, design and innovation; and
 - Organisations such as Enterprise Ireland, industry representative bodies and relevant higher education institutions should consider introducing a placement programme for Product Design graduates, broadly similar to the existing Export Orientation Programme.

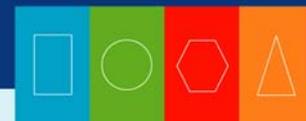
One important development since publication has been the alteration of Skillnets' criteria for tender applications for its Training Networks Programme (TNP) in 2010/2011, which now reflects a specific need for innovation in programmes delivered by its networks.

A Quantitative Tool for Workforce Planning in Healthcare: Example Simulations

The Skills and Labour Market Research Unit (SLMRU), FÁS, on behalf of the EGFSN and at the request of the Department of Health and Children and the Health Service Executive developed a workforce planning tool for the skills needs of the healthcare sector. The main objective of the research was to develop a set of quantitative models for 11 healthcare occupations and to simulate the demand and supply for each occupation under different scenarios. The simulations presented in the published report assume that there will be no non-Irish healthcare workers recruited into the sector so as to assess domestic supply only, and the extent to which the Irish education system will meet the simulated demand. The forecasting was undertaken for the period 2008-2020. The report also identifies specific issues relevant to the workforce planning of each occupation and spans both the public and private sector.

Some of the key findings are as follows:

- Nurses - If the existing density of nurses and midwives per capita (1,265/100,000 population) remains unchanged into the future, the annual recruitment requirement could reach 3,000 nurses and midwives by 2020 - this exceeds current domestic output. The balance between projected demand and supply varies across nursing divisions
- General Practitioners - If the existing density of GPs per capita (58/100,000 population) remain unchanged into the future, the annual recruitment requirement would exceed the current education system output of 120 GPs. Moreover, the shortage of GPs is likely to increase over time due to the compositional shifts in the GP workforce (increasing share of female and part-time GPs) and aging of the population.



- Consultants - If the existing density of specialist doctors (61/100,000 population) remains unchanged into the future, the current education output from higher specialist training would be sufficient to meet the estimated recruitment requirement; however, increasing the density in line with the targets set out in the Report of the National Task Force on Medical Staffing would result in a shortage.

In addition to the simulation results, the research identified a number of issues relevant for each occupation (e.g. the ongoing or expected changes in certain areas of service provision, appropriateness of current headcount densities, existing skill mix, alternative supply pools, regional variability of demand), which should be taken into account when using these models developed for workforce planning.

The key recommendations arising from the study are as follows:

- In order to improve the precision of the modelling, current data gaps should be addressed;
- Models developed should be used as part of an integrated workforce planning process which takes into account other quantitative and a range of qualitative factors which impact on the demand and supply of healthcare skills (e.g. demographic changes, economic and social developments, occupational skill mix, budgetary constraints, policy initiatives, incidence of illnesses, technological change); and
- Workforce planning in healthcare should be done on an ongoing basis.

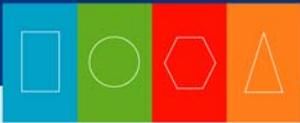
The model used in this study has already been adopted by the Health Service Executive to assist in workforce planning and the HSE has taken over the ongoing updating of the data. One example of its application is in tracking the supply chain for training the range of its medical specialties.

Future Skills Needs of the Wholesale and Retail Sector to 2016

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. Completed in December 2009, this report will be published in the first half of 2010. 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, and to assess the performance of the structures already in place for the sector. The report is based on extensive consultations and overseen by a steering group comprising industry, union and education and training stakeholders from the retail sector.

The wholesale and retail sector is a dynamic and innovative sector, which employs 14 percent of those employed in Ireland, and accounts for 11 percent of value added in the economy. The sector relies heavily on ICT to optimise the flow of goods from producers to consumers.

The central recommendation of the report is to develop a Skills Framework for the sector that will operate within and in harmony with the National Framework of Qualifications. This has the potential to allow employees to obtain national qualifications on the basis of meeting competency standards,



without requiring employers to make fundamental changes to the training they provide. This provides an opportunity to open up qualifications to tens of thousands of employees. The skills framework will be used in a number of ways:

- It will provide a common set of standards for skills in the sector.
- The skills framework will provide a means to communicate careers opportunities in wholesale and retail to potential recruits.
- It provides transparent career progression routes for those already working within the sector.
- It provides a means of identifying gaps in provision to address skills shortages.
- The framework could play a useful role in labour market activation for upskilling those that lost jobs in the sector and training those who are unemployed for future jobs within the sector.
- More broadly, by promoting career paths and greater attraction of talent in to the sector through a skills framework, and by developing the existing labour force, there is significant opportunity to improve productivity and competitiveness for enterprises within the sector.

With regard to implementation, the development of the Retail Skills Framework requires a co-ordinated effort between industrial representatives and education and training providers. It is anticipated that the Retail Skills Framework development will link in closely with work that FETAC will be conducting on the migration of existing retail awards to the Common Awards System.

The report also highlights that the Wholesale and Retail Sector has enormous potential for the development of Recognition of Prior Learning, particularly for experienced retail employees that have developed a broad skills base but do not appropriate qualifications.

Monitoring Ireland's Skill Supply: Trends in Education and Training Output

This report, published in November 2009 is produced by the Skills and Labour Market Research Unit of FÁS on behalf of the EGFSN. It is the fourth in the series which provides an indication of the supply of skills to the Irish labour market from the formal education and training system. The report examines outflows from the formal education system across levels 1-10 of the National Framework of Qualifications (NFQ).

The 2009 report shows that the output emerging from the education and training system in Ireland has continued to increase thereby potentially adding significantly to the supply of skills for the Irish labour market. With continued strategic investment, this upskilling and reskilling of the labour force will play a significant role in providing current and future enterprises with the competitive advantage necessary for Ireland to achieve sustainable export-led economic recovery.



Key trends identified include:

- The share of school leavers progressing to higher education has moved further towards the National Skills Strategy target of 72 percent. At over 60 percent, the progression rate in 2008 was already more than three percentage points above the rate in 2007;



- The attainment of recognised awards was not confined to school leavers which represents a positive move in terms of the up-skilling and re-skilling that is taking place for those who may already have left full-time education; more than a third of FETAC awards recipients (all award types) were aged between 30 and 49 years, while one fifth of higher education awards were made to part-time students;
- The number of highly skilled graduates has continued to increase with the number of third level graduates in Ireland reaching over 56,300 in 2007 (up from approximately 55,100 in 2006);
- Furthermore, students are opting to take more advanced courses with the increase in graduate numbers concentrated at levels 8 and 9 (honours degrees, postgraduate certificates/diplomas and masters degrees);
- The number of PhDs awards in Irish higher education reached its highest level to date in 2007 and exceeded 1,000 for the first time;
- Increases in the number of CAO acceptances, combined with increases in post-graduate enrolments (enrolments in 2007/08 were 10 percent higher than in 2006/2007) should ensure a continuing rise in the outflow of skills from higher education; and
- There has been a shift towards higher educational attainment in Ireland's labour force; these shifts are in the direction of the target set out in the Government's National Skills Strategy. The share of the labour force with lower education or less is diminishing, while the share with third level qualifications is increasing.

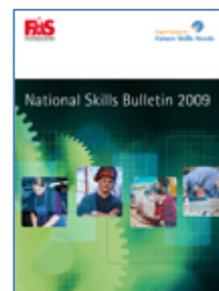
The National Skills Bulletin 2009

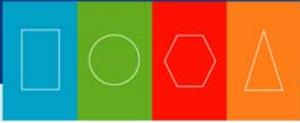
The latest *National Skills Bulletin*, published in July 2009, presents key labour market trends with the aim of assisting policy formulation in the areas of employment, education and training, and immigration. It also aims to provide information relating to developments in the Irish labour market for students, career guidance advisors, and other interested parties. The bulletin confirms that while the Irish labour market took a sharp negative turn in 2008, there are still some areas of job opportunity.

Labour Market Overview

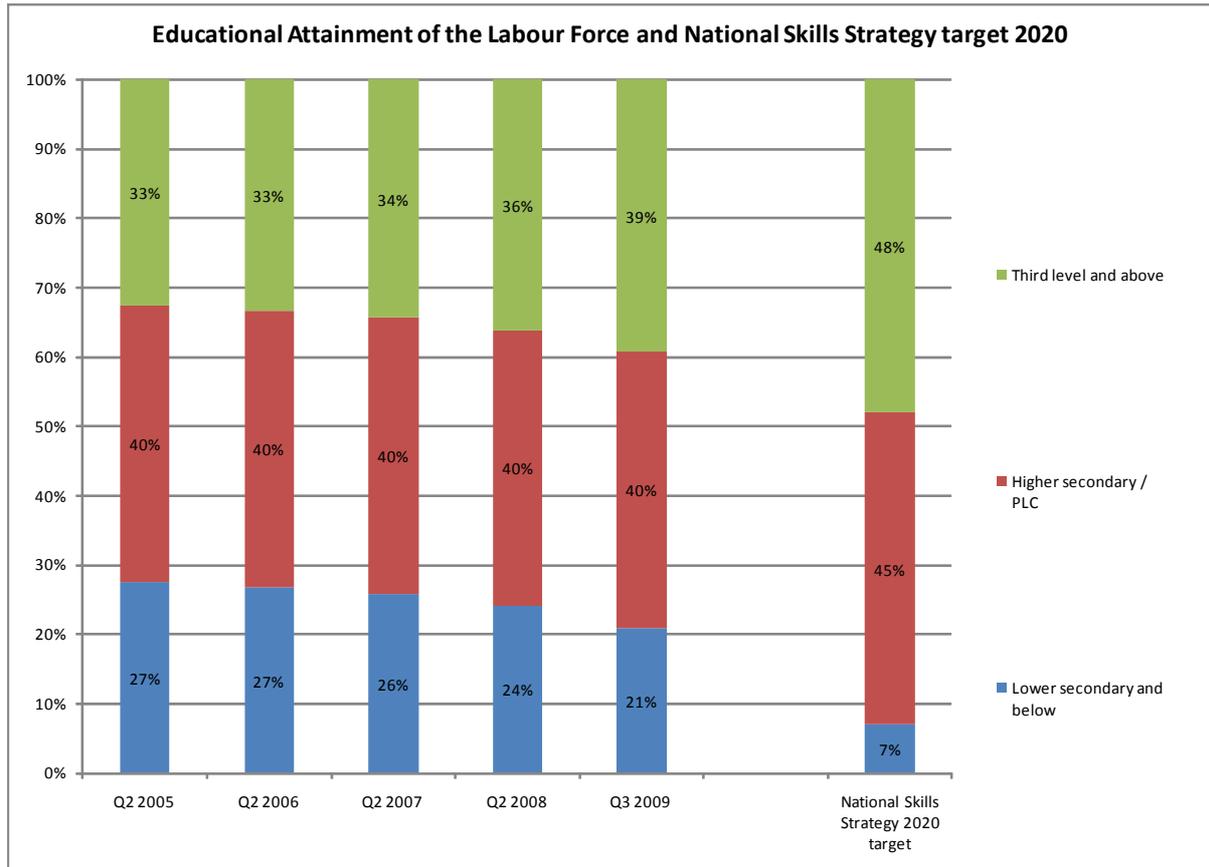
The report highlights the four sectors where job losses were concentrated - construction, manufacturing, hospitality and transport. Construction suffered the largest decline. This year's report for the first time examines regional employment trends. All regions except the South East experienced a decline in employment. While the greatest net job losses were recorded in Dublin and Border regions, those living in the Midlands and West are at greatest risk of being unemployed.

The report also identifies that males, those under 25s, those with lower levels of education, non-Irish nationals, residents of the BMW (Border Midlands and West) region, those employed in construction and services sectors and those employed as crafts persons (especially, carpenters, bricklayers and plasterers) and labourers are the groups at greatest risk of being unemployed.





The *National Skills Strategy*, published by the Expert Group in 2007, set out the need to increase the educational profile of the Irish labour force if we are to achieve a successful, high value-added economy. The *National Skills Bulletin 2009* finds that progress has been made towards this goal over the last three years with the percentage of those with below Leaving Certificate qualifications shrinking (from 29 percent in 2005 to 24 percent in 2008) and the share with honours degree or above increasing (from 20 percent in 2005 to 25 percent in 2008).



Skills Shortages

The extent of skills and labour shortages in Ireland has lessened considerably over the past year, with many occupations now in surplus. There are no labour shortages in Ireland at present. However, despite rising unemployment, skill shortages have been identified in the specialised high skill areas of IT, science, sales/marketing, health, accountancy, engineering and management. Demand is confined to those with third level qualifications and with specific expertise and experience. For example, companies are still finding it difficult to source advanced IT system management skills, experienced engineers for the development and implementation of lean manufacturing processes and scientific technicians for development and prototyping of specific medical devices.



Other Activities & Policy Inputs Developed by EGFSN in 2009

National Skills Database

The National Skills Database (NSD), developed and maintained by the Skills and Labour Market Research Unit (SLMRU) of FÁS, collates all available information on the supply and demand of skills in Ireland. It represents an effective tool for timely analyses and forecasting of the labour market at sectoral and occupational level. It facilitates the use of a wide range of indicators and models to assess potential imbalances between the demand and supply of skills.

New queries have been set up in the interface of the National Skills Database (NSD) (utilising already available data sources) allowing for quick analysis of data relating to unemployment and regional employment data. The latest NACE coding, adopted by the CSO, has also been incorporated in to the NSD.

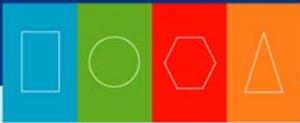
During 2009 the NSD was updated to include the latest statistics and information on the following:

- Employment
- Education and training output
- Immigrant labour force
- Notified job vacancies (for example: The Irish Times, Irish Jobs.ie, FÁS)
- Labour force forecasting model
- Occupational employment forecasting models
- Recruitment agency survey (SLMRU)

Recruitment Agency Survey

The Recruitment Agency Survey is administrated by the SLMRU (FÁS). A web based questionnaire, designed to capture recruiters' opinions and experiences regarding any existing skills shortages, is sent to recruitment agencies operating in Ireland. The main purpose of this survey is to supplement the information available from the National Skills Bulletin by incorporating the views of recruitment agencies in the assessment of the balance between the demand and supply of skills in the Irish labour market.

The survey was first run in April 2008 and has been carried out every six months thereafter. While the timeframe is yet too short for a comprehensive trend analysis, it is nevertheless possible to monitor the changes in the labour market. The survey of April 2009, indicated that, for the first time, some recruiters stated that they had no vacancies which were difficult to fill. The most recent survey (October 2009) of recruitment agencies found that while there was an excess supply of skills for most occupations, skills shortages continued to exist and the demand for the identified skills in short supply has remained strong. When asked to compare skills demand in October 2009 with that of the preceding twelve months, recruiters stated that demand had remained the same for over one half of the difficult to fill vacancies and had even increased for one fifth of them. The demand is mostly for highly qualified individuals who had acquired specific skills sets through work



experience in specialised posts or niche areas. This was consistent with the findings from the previous survey, with in excess of one half of the job titles that were proving difficult to fill classified as professional or managerial level occupations. Sectors where the demand for skills continued to be strong were biotechnology, medical devices, pharmaceuticals, IT and energy.

In contrast with previous findings, recruitment agencies reported that salaries had fallen for most positions on offer. However, they were still holding for some specialised skills and niche areas, while increases were observed only in exceptional circumstances.

Vacancies

The SLMRU compiles an overview of labour demand expressed in terms of notified job vacancies. This is done by conducting an analysis of vacancies notified to FÁS, IrishJobs.ie and the Irish Times.

The key findings from the 2009 IrishJobs.ie Vacancy paper are as follows:

- Vacancies advertised with IrishJobs.ie during the year occurred most frequently for managerial positions (primarily in retail), followed by associate professional and technical occupations.
- While the proportion of permanent full-time positions has been in decline, and contract positions have been increasing, this differed significantly between sectors with 83% of vacancies in the first nine months of 2009 in retailing for permanent full-time positions compared to 41% for those in engineering.
- Similarly, the level of education and experience required differed significantly between sectors.

Statement on In-Employment Training

In order to advise on decisions to be made in relation to the funding allocations for in-employment training in the 2010 estimates process, this statement outlines the importance of maintaining State investment in in-employment training, notwithstanding current economic difficulties. In particular, it emphasises the key role that State-funded in-employment training can play in combating the effects of the recession: it can boost productivity, assist job retention, and ultimately enhance competitiveness leading to expedited economic growth. Investment in in-employment training will also be important for the long term development of the economy. The importance of the National Training Fund in funding in-employment training (as well as training the unemployed), especially in recessionary times when employers cut back on the funding they make available for training, is also considered. State funding of in-employment training also serves to stimulate further private sector investment in skills.



Higher Education Labour Market Activation

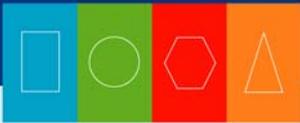
A Higher Education Labour Market Activation Response Group was established in 2009 in response to the increased need for new and expanded types of education and training provision targeted at those who are losing their jobs, or who face uncertain employment prospects. The EGFSN Head of Secretariat participated on the Group. The core objectives of the group are as follows:

- To develop the short term and longer term responses which the sector can make to the emerging training and education needs arising from recent growth in unemployment;
- To ensure how best any new or expanded provision can be aligned with predicted future skills needs; and
- To develop enhanced collaboration with other education and training providers in meeting the skills needs of the workforce.

The EGFSN provided an outline of its analysis on future skills needs to inform the call for programmes to address labour market activation measures in the Higher Education Sector.

Other Activities

During 2009, the EGFSN has continued to work with stakeholders to ensure that key labour market data is disseminated to all relevant parties. The Group made presentations on a wide range of labour market issues at a number of conferences and specific workshops, including the Institute of Guidance Counsellors, Institutes of Technology and Vocational Educational Committees. In addition, the Group's output has directly informed the activities of stakeholders such as Careers Portal and Qualifax who have used EGFSN data to inform their target audiences.



Review of Implementation of Recommendations of EGFSN Reports 2004-2009

Background

In 2009, the EGFSN examined progress on the implementation of recommendations in its reports, focusing on the period 2004-2008. During that period, the EGFSN published 17 reports containing some 130 recommendations, including the National Skills Strategy. In 2009, three further reports on the healthcare sector, creativity, design and innovation and the food and beverage study were published. The latest of these reports was published in November 2009 so it could reasonably be expected that some progress on most of them might be in evidence at this stage.

Of the 20 subject areas covered:

- **Eleven are sectoral** - High-level ICT skills; International Financial Services; Digital Media, phases 1 and 2; Medical Devices; Biotech; Food Processing and Beverages (2003, 2009), Construction, Creativity, Design and Innovation, Healthcare.
- **Three are cross-sectoral** - SME management development, Languages and Enterprise and Innovate, Market, Sell
- **Four are broadly related to improving skills and LM information in various ways** - Survey of Selected Multinational Employers' Perceptions of Certain Graduates from Irish Higher Education, Careers and Labour Market Information in Ireland, Skills at Regional Level in Ireland and Raising National Mathematical Achievement.
- **Two deal with broader strategic considerations** - the National Skills Strategy and the Role of Migration.

Overview of progress

Some substantive progress across the board can be recorded in regard to the principal recommendations, especially for the sectoral reports; however there is a more mixed picture when it comes to the full picture on implementation, particularly in regard to cross-sectoral ones. In summary:

- For seven reports - The Demand and Supply of Skills in the Food Processing Sector (2003), Skills Needs in the Irish Economy: The Role of Migration (2005), Future Requirement for High-Level ICT Skills in the ICT Sector (2008), Future Skills Needs of the Irish Medical Devices Sector (2008), Skills Requirements of the Digital Content Industry in Ireland Phase I (2005), Future Skills Requirements of the International Digital Media Industry: Implications for Ireland (2006) and The Future Skills and Research Needs of the International Financial Services Industry (2007) - the main recommendations have been or are being actively progressed.
- The Quantitative Tool for Workforce Planning in Healthcare: Example Simulations, Creativity, Innovation and Design and Future Skills Requirements of the Food and Beverage Sector were published in the second half of 2009 and it is too soon to comment on implementation.



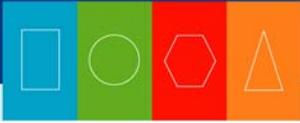
- Those involving SME management type issues are part of the work of the Management Development Council - the SME Management and aspects of other reports such as Innovate Market Sell. The Management Development Council launched its report on 16 March 2010.
- The options set out in the Role of Migration report have been acted upon by Government
- The National Skills Strategy is subject to a separate implementation and reporting process. The Minister of State for Life Long Learning, Seán Haughey TD, launched a progress update on meeting the National Skills Strategy Objectives on 20 March 2010.
- Some progress has been made on the Languages and Enterprise report. The NCCA is currently reviewing languages at secondary level, to address a number of issues including the need to update syllabus content to reflect developments in ICT. The NQAI has also been examining the alignment of languages in the NQF with the European model.
- A private sector initiative has led to the main recommendation of the Careers and Labour Market Information recommendation being implemented viz creation of a national skills portal. Some progress on other actions has occurred.
- The skills recommendations in the Skills at Regional level report were further investigated by the EGFSN during 2007-8, particularly with regard to the National Skills Strategy recommendation to examine the potential of existing regional structures to advance regional skills needs. The research concluded that no new structures are required to improve identification and communication of skills needs at regional level.
- The recommendations arising from the Survey of Multinational Employers echo recurring themes in other reports, such as more placements and better information dissemination. As such, they do not call for specific separate action.

Three of the more recent reports which have strong advocates in the form of sectoral representative bodies show most visible early progress, namely the ICT High-level skills, Irish Medical Devices and Financial Services sector reports.

The most frequently recurring focus of the recommendations in the twelve sectoral reports involve introducing changes in third/fourth level provision for the relevant sectors and as such are addressed primarily, though not exclusively, to third-level institutions and the educational establishment. These recommended changes are to do with the introduction of new modules, creation of new programmes, establishment of new education/research bodies (e.g. graduate education institute for biomedical engineering, financial services research capability), more interdisciplinary projects and inclusion of business and/or interpersonal skills acquisition in programmes.

Following its initial review of implementation in 2009, the EGFSN held a meeting with educationalists where it was agreed that the EGFSN should circulate its reports to the registrars of third level institutions to help progress specific recommendations that involve third level institutions.

Other recurring features involve better industry/agency/education sectoral networking and pro-active promotion/information dissemination of sectoral opportunities, skills needs.



Extent to which certain recommendations recur

A feature of this exercise was the extent to which certain areas for recommendation crop up across reports. It is not surprising in some respects that this should be so and it does not raise any question as such about the validity of these recommendations in the individual contexts within which they arise. However, it does suggest that there may be a need to consider if there are alternative, and possibly more effective, ways of addressing these recurring issues to achieve the desired end.

Examples include:

- Adding to/adjusting course or programme content, learning approaches, most frequently at third/fourth level education
- Increasing the numbers of graduates for particular sectors
- Upskilling of lower-skilled, technicians
- The need for more/better
 - work placement experience
 - industry/HEI liaison
 - access to information
 - promotion/awareness campaigning of various kinds

The implementation process

With regard to implementation of recommendations per se, the EGFSN notes several points:

- The recommendations are agreed by the Expert Group and, as such, generally involve representation of the various interested stakeholders in determining their final content.
- Steering Group involvement and other consultation processes which form part of the content of reports provide further opportunities for interested stakeholders, including non-EG members, to contribute to the content of recommendations.
- For the most part, although not in every instance, the implementing body/ies are explicitly identified in the recommendations. However, where for instance the recommendation is addressed to higher education institutions, there is no individual source to refer to in order to establish progress.
- The Expert Group does not have a direct role in effecting the implementation of recommendations. That said, time invested in follow-up of reports by way of presentations and other forms of engagement does seem to help provide impetus to action and/or bring certain stakeholders together to develop a common response.

Following circulation of the implementation report in April 2009, the EGFSN decided to put further processes in place to help implementation:

1. Achieving buy-in from stakeholders prior to publication of reports
2. Letters from the Chair to the stakeholders named as the principal driver in implementation
3. Follow-up meeting of Steering Groups, six months after report publication.



Forthcoming EGFSN Publications in 2010

Future Skills Needs of the Biopharma-Chemical Sector

This study will examine the skills required to support high value-added activity in the pharmaceutical and bio-pharmaceutical sectors in Ireland to 2020. It will build on the Forfás report *Health LifeSciences in Ireland - An Enterprise Outlook* and *Building Ireland's Smart Economy: A Framework for Sustainable Economic Renewal*, both published in 2009.

As well as analysing of labour market and educational statistics relevant to the sector, a series of consultations with enterprise, education and training providers and state agencies will also be conducted. The findings will be appraised cognisant of international best practice in education and training provision. It is envisaged that the report will be finalised and published in the second half of 2010.

Addressing the Future Skills Needs of Enterprise within the Green Economy in Ireland

Following on from the Submission to the high level group on the green economy in 2008, this EGFSN report will address Ireland's need for skills applicable to 'green' industries and its associated occupations. The emerging 'green economy' is seen as resulting in a new skills paradigm that places greater emphasis on professions from different disciplines working in multi-disciplinary teams. This means that generic skills as well as technical skills sets will be important. The specific skills associated with 'green jobs' are not seen as being entirely new skills - rather it is expected that they may be an add-on to existing skills / or an amalgam of existing skills.

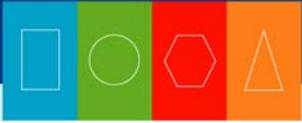
The aim of the project will be to review the current and future requirement and provision of skills relevant to the development of the 'green economy' (as defined) and to make proposals to ensure that anticipated skills (quality and quantity) are in place to realise the employment (job maintenance and job growth) and export potential of the sector. This report is expected to be published in the third quarter of 2010.

Monitoring Ireland's Skill Supply: Trends in Education and Training Output

Undertaken annually in conjunction with Skills and Labour Market Research Unit of FÁS, this EGFSN report will provide an update on the output emerging from the education and training system in Ireland, pointing to the key trends and implications for strategic investment in upskilling and reskilling of the labour force. It is envisaged that this report will be released in the third quarter of 2010.

The National Skills Bulletin 2010

The Annual National Skills Bulletin, scheduled for release in mid-2010, will provide a comprehensive overview of labour market conditions, including developments in sectoral and aggregate employment levels. The Bulletin will also reveal where sectoral and occupational skills shortages are evident, and provide an analysis of the workforce by educational attainment, key to measuring progress towards goals set out in the National Skills Strategy.



Research and Analysis

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

Research, analysis and secretariat support to the EGFSN is provided by Forfás and FÁS.

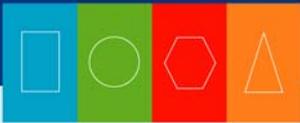
EGFSN work undertaken by Forfás is funded through the National Training Fund (NTF). In 2009, the Group's total expenditure was €511,768, of which €482,371 was accessed via the NTF.



Appendix I

Publications by the Expert Group on Future Skills Needs

Report	Date of Publication
Future Skills Requirements of the Food and Beverage Sector	November 2009
Skills in Creativity, Design and Innovation	November 2009
Monitoring Ireland's Skill Supply - Trends in Education and Training Outputs 2009	November 2009
National Skills Bulletin 2009	July 2009
A Quantitative Tool for Workforce Planning in Healthcare: Example Simulations	June 2009
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
Tomorrow's Skills: Towards a National Skills Strategy	March 2007
National Skills Bulletin 2006	December 2006
Future Skills Requirements of the International Digital Media Industry: Implications for Ireland	July 2006
Careers and Labour Market Information in Ireland	July 2006
Skills at Regional Level in Ireland	May 2006
SME Management Development in Ireland	May 2006
Monitoring Ireland's Skills Supply: Trends in Educational/Training Outputs	January 2006
Data Analysis of In-Employment Education and Training in Ireland	December 2005



National Skills Bulletin 2005	October 2005
Skills Needs in the Irish Economy: The Role of Migration	October 2005
Languages and Enterprise	May 2005
Skills Requirements of the Digital Content Industry in Ireland Phase I	February 2005
Innovate Market Sell	November 2004
The Supply and Demand for Researchers and Research Personnel	September 2004
Literature Review on Aspects of Training of those at Work in Ireland	June 2004
Financial Skills Monitoring Report	November 2003
Responding to Ireland's Growing Skills Needs - The Fourth Report of the Expert Group on Future Skills Needs	October 2003
The Demand and Supply of Skills in the Biotechnology Sector	September 2003
Skills Monitoring Report - Construction Industry 2003/10	July 2003
Benchmarking Education and Training for Economic Development in Ireland	July 2003
The Demand and Supply of Engineers and Engineering Technicians	June 2003
The Demand and Supply of Skills in the Food Processing Sector	April 2003
National Survey of Vacancies in the Private Non-Agricultural Sector 2001/2002	March 2003
National Survey of Vacancies in the Public Sector 2001/2002	March 2003
The Irish Labour Market: Prospects for 2002 and Beyond	January 2002
Labour Participation Rates of the over 55s in Ireland	December 2001
The Third Report of the Expert Group on Future Skills Needs - Responding to Ireland's Growing Skills Needs	August 2001
Benchmarking Mechanisms and Strategies to Attract Researchers to Ireland	July 2001
Report on E-Business Skills	August 2000
Report on In-Company Training	August 2000
The Second Report of the Expert Group on Future Skills Needs - Responding to Ireland's Growing Skills Needs	March 2000
Business Education and Training Partnership 2 nd Forum, Dublin	March 2000
Business Education and Training Partnership Report on the Inaugural Forum, Royal Hospital Kilmainham	March 1999
The First Report of the Expert Group on Future Skills Needs - Responding to Ireland's Growing Skills Needs	December 1998

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