

The Expert Group on Future Skills Needs Statement of Activity 2015

May 2016



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Foreword

The availability of a well-educated labour force with the right skills for the economy is a key enabler of enterprise growth and job creation. The competition for talent has become global in some sectors and Ireland's ability to compete in international markets, as well our ability to attract foreign direct investment and improve the competitiveness of our regions, will increasingly be driven by the availability of a well-skilled labour force at all levels.



However, the labour market is constantly evolving, and the specific occupations, skills and qualifications that are required by the economy are changing more rapidly than ever before. It is important that we anticipate these changing requirements and ensure that we provide the appropriate skillsets to the current and future workforce to support their employability and the sustainability of our enterprise base.

The Expert Group on Future Skills Needs (EGFSN) plays a key role in identifying current and future skills needs of enterprises, advising the Irish Government on these needs and, through our publications, providing valuable research, analysis, and indicators of skills demand for education and training providers, guidance counsellors, jobseekers and students alike. This Activity Report provides a summary of the work of the EGFSN in 2015, and outlines some of the key areas which the Group plans to address in 2016.

During 2015 the EGFSN published research on the future skills requirements of a number of specific sectors: the Hospitality Sector, the Marine/Maritime Economy, and the Freight Transport, Distribution and Logistics sector. This report summarises the findings of each of these pieces of research.

During 2015, the EGFSN also continued to monitor trends in supply and demand through its annual labour market reports produced by the Skills and Labour Market Research Unit (SLMRU) in SOLAS: *National Skills Bulletin 2015*, *Monitoring Ireland's Skills Supply 2015*, *Vacancy Overview 2014* and *Regional Labour Markets Bulletin 2015*.

The *National Skills Bulletin* provides an analysis of employment trends at occupational level for over 130 occupations. The 2015 edition of the report indicates that, with economic recovery strengthening, shortages are intensifying in areas such as ICT, engineering, sales/customer care, logistics, health, business and finance, while skills shortages are emerging in areas such as hospitality and construction.

There is a growing demand for labour market information that goes beyond national level. 2015 saw the publication by the Government of a series of Regional Action Plans for Jobs at NUTS III level (Border, Dublin, Mid East, Mid-West, Midland, South East, South West and West), each of which places an emphasis on skills enhancement and labour market activation in the region.



The Department of Education and Skills also commenced the process of establishing Regional Skills Fora in 2015. The annual *Regional Labour Markets Bulletin* which is compiled by the SLMRU on behalf of the Expert Group can make a valuable contribution to informing the skills agenda a regional level. The 2015 Bulletin showed improvements in the labour market situation in most regions, but also identified variations in skills supply and demand across the regions.

Strong co-operation between employers and the education and training system is crucial to ensure that skills provision is relevant to the needs of the economy. As in previous years, the EGFSN provided the *Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise* for the Springboard+ 2015 Call. A key objective of Springboard is to enhance collaboration and engagement between the enterprise sector and education providers in the design and delivery of programmes for job seekers in areas required by enterprises.

The publication of a new National Skills Strategy by Government in January 2016 marks an important milestone in addressing the skills needs of the economy and of society. The Strategy builds on the progress made since the last skills strategy, *Towards a National Skills Strategy*, which was published by the EGFSN in 2007.

The new Skills Strategy envisages the establishment of a National Skills Council which will advise on prioritisation of identified skills needs and how to secure delivery of those needs. The key elements of the EGFSN's model of analysis and horizon scanning, and close engagement with enterprise, will be maintained. The Expert Group welcomes the publication of the National Skills Strategy and looks forward to working closely with the National Skills Council through the provision of research and analysis on the future skills needs of the enterprise sector.

Finally, I would like to record my appreciation to the members of the Steering Groups who oversaw the progress and the development of the sectoral reports undertaken in 2015, and also the representatives from industry, education and training, professional bodies and State Agencies who provided valuable time and insights into the research through their participation at interviews and workshops.

I would like to thank the members of the Expert Group on Future Skills Needs for their continued commitment to the work of the Group, the Department of Education and Skills for their ongoing support, and the Secretariat teams in both the Department of Jobs, Enterprise and Innovation and the Skills and Labour Market Research Unit in SOLAS for the research and analysis work that they provide to the group.

Una Halligan

Chairperson, Expert Group on Future Skills Needs



Introduction

The Expert Group on Future Skills Needs (EGFSN) has the task of advising Government on future skills requirements and associated labour market issues that impact on enterprise development and employment growth.

Specifically, the Group carries out analysis in order to:

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

The Group is composed of representatives of business, employees, education, training, Government departments and State agencies. The membership of the Group is outlined on the following page.

In accordance with its mandate, an annual report is to be provided to the Minister for Education and Skills and the Minister for Jobs, Enterprise and Innovation. In conformance with this requirement, this Statement of Activity provides details of the Group's output and activity in 2015, forthcoming work in 2016, and information on the Group's research and analysis resources.

Research and Analysis Resources

The research, analysis and administration support to the EGFSN is provided by the Department of Jobs, Enterprise and Innovation and the Skills and Labour Market Research Unit, SOLAS.

EGFSN work undertaken by the Department of Jobs, Enterprise and Innovation is part-funded from the National Training Fund (NTF), through the Department of Education and Skills. In 2015, €336,111 was spent from the NTF towards the cost of this work.



Members of the Expert Group on Future Skills Needs

Ms. Una Halligan	Chairperson
Mr. William Parnell*	Principal Officer, Skills and Education Unit, Department of Jobs, Enterprise and Innovation (also EGFSN Head of Secretariat)
Ms. Inez Bailey	Director, National Adult Literacy Agency
Mr. Peter Baldwin	Assistant Secretary, Department of Education and Skills
Dr. Vivienne Patterson**	Higher Education Authority
Mr. Ray Bowe	IDA Ireland
Mr. John Burke	Principal Officer, Department of Public Expenditure and Reform
Ms. Liz Carroll	Training and Development Manager, ISME
Mr. Mark Christal***	Manager, Client Development, Mentoring and Skills, Enterprise Ireland
Mr. Ned Costello	Chief Executive, Irish Universities Association
Ms. Margaret Cox	Managing Director, I.C.E. Group
Mr. Bill Doherty	Executive Vice President, EMEA, Cook Medical
Mr. Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Dr. Bryan Fields	Director, Curriculum Development / Programme Innovation, SOLAS
Mr. Paul Healy****	CEO, Skillnets
Mr. Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Mr. Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Dr. Brendan Murphy	President, Cork Institute of Technology
Dr. Peter Rigney	Industrial Officer, ICTU

* Replaced Marie Bourke with effect from September 2015

** Replaced Tom Boland with effect from March 2016

*** Replaced Colm Mac Fhionnlaioich with effect from February 2016

**** Replaced Alan Nuzum with effect from January 2016

Frank Mulvihill resigned with effect from April 2016

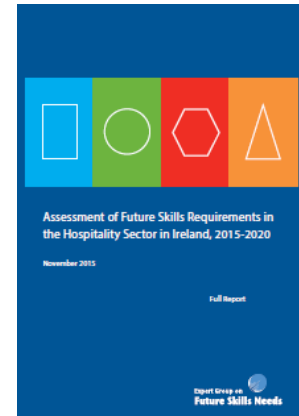


EGFSN Research and Analysis in 2015

Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020

The Hospitality sector plays an important role in the Irish economy, as evidenced by the fact that businesses in the sector collectively employ an estimated 158,000 individuals in over 16,000 enterprises. This represents over 8% of economy-wide employment, with the sector contributing €3 billion gross value added to the economy.

The study assesses the skills demand needs arising within the Hospitality sector in Ireland covering hotels, restaurants, bars, canteens and catering - over the period to 2020. The aim of this report is to ensure that the right supply of skills will be available to help drive domestic hospitality sector business and employment growth. The study assesses skills demand at all NFQ levels, with a particular focus on career progression opportunities for those at lower skilled levels to help fill anticipated job openings.



Future Skills Demand

Employment in the Hospitality sector is projected to reach between 167,980 to 179,530 jobs by 2020, representing an increase of between 6.3% and 13.6% from 2014 levels. The highest demand growth is anticipated for chefs/cooks, waiters/waitresses and catering assistants.

The Hospitality sector can be characterised as being highly seasonal with part-time employees making up 40% of those employed in the industry. These factors are likely to impact recruitment into the sector.

Irish nationals accounted for a lower percentage of employees in the sector than in the wider economy. This highlights the importance of factoring migration into the assessment of possible sources of future skills supply in the hospitality sector.

There are a significant number of skilled persons on the Live Register seeking employment in hospitality occupations. These individuals require appropriate training/upskilling to return to work.

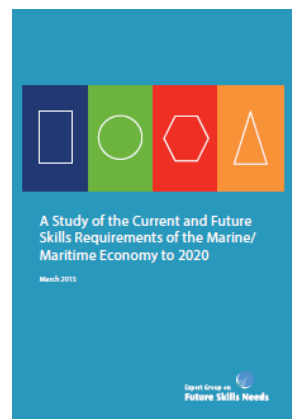
Key findings

- One of the main areas experiencing a shortage is suitably qualified chefs, while shortages of commis chefs feed into shortages at higher and specialist levels. In addition, there are skills shortfalls emerging among front-of-house, waiting and other staff.
- There are high rates of exit/replacement among certain occupations in the sector. The challenge is to retain staff by providing appropriate education and training and make the industry a more attractive career path for individuals who wish to make hospitality a long-term career choice.
- There is a need to increase FET related NFQ Level 4/5 provision for kitchen/catering, bar staff and waiting staff.
- A key recommendation of the report is the establishment of a National Oversight and Advisory Group to oversee the skills development and promotion of the Hospitality sector in Ireland.



Current and Future Skills Requirements of the Marine/Maritime Economy to 2020

Our ocean is a national asset, supporting a diverse marine economy. There is huge potential to tap into a €1,200 billion global marine market. In 2010, (the latest year for which data is published), Ireland generated 1.2% of GDP (€2.4bn direct and indirect Gross Value Added (GVA)) from its ocean economy. This EGFSN study focuses on five sectors of the marine economy, namely: Seafood and Bio-Products; Maritime Transport, Shipbuilding and Services; Energy; Marine Tourism; and Maritime Monitoring, Security and Surveillance. These sectors were identified in a previous government report, *Harnessing Our Ocean's wealth - an Integrated Marine Plan for Ireland (HOOW)*, as being key contributors to the Irish Marine Economy. The report assesses the profile and diversity of the occupations and skills requirements of enterprises in the different sectors that make up the Marine/Maritime economy and proposes recommendations to ensure that Ireland has the right skill base to meet enterprise needs.



Future Skills Demand

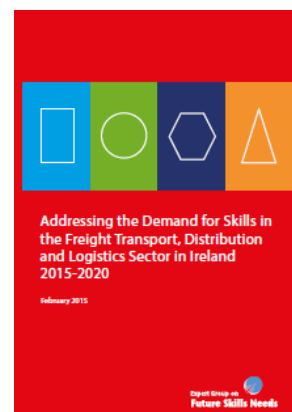
There are approximately 16,155 people employed in the marine economy in marine and coastal regions around the country. Their roles are spread across the key sectors and straddle the full range of occupations from managerial and professional to operatives, including engineers, marine biologists, maritime lawyers, environmental scientists, naval architects, technicians, crane operators and fish filleters. The report estimates that Ireland has the potential to create up to 16,900 jobs in the period to 2020 arising through expansion and replacement demand, with around 10,000 of these being new jobs arising from growth of the marine economy. The largest expansion demand is forecast in Maritime Transport, Shipbuilding and Services (4,928 new jobs) and Marine Tourism (3,447 new jobs).

Key Findings

- There are many opportunities for a career in the marine economy with a high proportion of employment opportunities based in rural areas.
- In the seafood sector, the workforce is aging and this will present a skills difficulty unless measures are put in place to attract and upskill younger workers.
- Many of the occupation and qualification demands are either non-technical, e.g., managers or professionals, or are not specific to the marine economy, e.g., engineering and software development. These qualifications can therefore be "marinised" by additional training or a top-up qualification in a marine context.
- ICT skills need to be embedded in existing maritime education and training. This extends to all occupations and the ICT skills of coastal communities needs to be improved so that ICT becomes an integral part of the marine economy.
- Some recommendations of the report include: raising awareness of career opportunities in the Marine economy, ongoing monitoring of skills needs in each sub-sector of the industry and development of a mentoring programme in the Seafood sector.

Addressing the Demand for Freight Transport, Distribution and Logistics Skills in Ireland

The Freight Transport, Distribution and Logistics (FTDL) sector is of strategic and operational importance for business within Ireland across all sectors of the economy. There were an estimated 48,800 people employed in core FTDL occupations in 2015. These roles are spread across a range of sectors within the economy including transportation and storage, manufacturing and retail and wholesale trade. This EGFSN study assesses the skills and competency requirements for the Freight Transport, Distribution and Logistics sector in Ireland up to 2020, and proposes recommendations that will ensure Ireland has the right skill base to meet enterprise needs.



Future Skills Demand

Logistics is in operation 24 hours a day, seven days a week and supports all sectors across the economy, both in terms of facilitating international trade and the movement of freight domestically. As freight-orientated companies become more logistics-orientated they need skilled staff to provide a better service - and for that they need skilled staff.

The analysis in this report indicates that, due to an anticipated expansion in the sector and the replacement demand for those employed in core FTDL occupations, some 13,500 to 15,500 job vacancies could become available over the period 2015-2020.

In terms of recruitment, the main anticipated skills impediment is for HGV drivers with the required licence. A significant proportion of HGV drivers are also approaching retirement. Heavy goods vehicle drivers comprise approx. 45% of the total potential vacancies in the sector.

There is demand for more graduate level entrants to the FTDL sector to ensure future provision of managers, planners and associated professionals with adequate skills.

The increasing use of warehouse management systems and stock control, and temperature controlled warehousing is resulting in a need for more skilled warehouse staff. Warehouse roles in demand include warehouse managers, fork lift operators, and warehouse operatives.

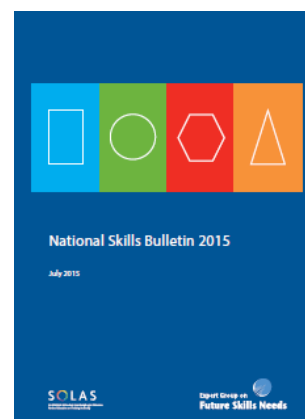
Key Findings

- Employees are recruited from a variety of sources, with word of mouth and referrals being a common method of recruitment for lower skilled operatives and HGV driving roles. A feature of the sector is the lack of a coordinated approach to the delivery of relevant training and the provision of career path opportunities, especially for those at lower skill levels.
- At present, employers surveyed perceive few recruitment difficulties (HGV drivers being an exception). This is likely to change due to increasing skills demand arising over the next five years. In order to meet this demand, the poor image of the FTDL sector needs to improve.
- Trends towards the extended use of IT further demonstrate a need to equip managers and staff at all levels to handle IT and data to improve planning and better control outcomes.
- Two of the key recommendations of the report are to develop an industry led Logistics Skills Engagement Group to enhance Ireland's logistics and supply chain capability and to develop national occupation standards for the FTDL sector to create better career pathways.



National Skills Bulletin 2015

The National Skills Bulletin 2015 is produced by the Skills and Labour Market Research Unit (SLMRU) in SOLAS on behalf of the Expert Group on Future Skills Needs (EGFSN). It presents an overview of the Irish labour market at occupational level. The Bulletin aims to assist policy formulation in the areas of employment, education/training, immigration (particularly the sourcing of skills which are in short supply from the Irish and/or EEA labour market, as well as informing career guidance advisors, students and other individuals making career and educational choices. The Bulletin is based primarily on data held in the SLMRU's National Skills Database up to Q4 2014.



Labour Market Overview

During 2014 a number of improvements were seen within the Irish labour market. On an annual average basis, employment increased by 33,000 with the overall employment rate increasing by 1.2 percentage points to 61.7%. The unemployment level declined by 40,000 representing a fall in the unemployment rate of 1.8 percentage points to 11.3%¹. The long term unemployment rate declined to 5.7% in Q4. However some challenges still exist within the labour market. The labour force declined by 6,500 (annual average) and net outward migration of Irish nationals was recorded at 29,200. The unemployment rate remained high for certain segments of the labour market (e.g. persons with lower secondary or less education (18%), under 25s (20%) and former construction workers (21%)).

Over the 12 month period from Q4 2013 to Q4 2014 the construction sector had the largest employment growth of 13%, followed by the financial and education sectors at 5% each. However employment in the construction industry is still 16% lower than 5 years previously (Q4 2009) with 30,000 of those previously employed in construction still unemployed in Q4 2014. Sectors which show increased employment levels, when compared to 2009 figures, include ICT and professional activities, which have increased by 12%, and scientific and technical activities which have increased by 13%.

Skills shortages

As the recovery in the labour market gathered pace during 2014, shortages were observed in a greater number of occupations and sectors compared to recent years. There is growing demand for science professionals, engineers, ICT professionals, various roles in the business and financial sector and construction professionals such as construction and quantity surveyors. Other sectors which are experiencing skills shortages include the Hospitality sector, the healthcare sector, transport (especially supply chain management), sales and customer service and social care.

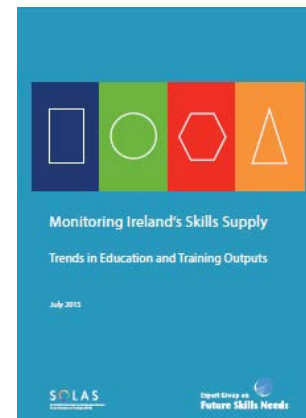
During 2014, employers continued to source skills from outside the EEA. Approximately 4,100 new employment permits were issued in the first nine months, an increase of 34% on 2013. The IT sector accounted for 43% of all new employment permits issued in 2014, with a further quarter issued to the healthcare sector.

¹ Further improvements in the unemployment rate were recorded during 2015 and into 2016.



Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2015

Monitoring Ireland's Skills Supply 2015 is produced by the Skills and Labour Market Research Unit in SOLAS on behalf of the Expert Group on Future Skills Needs. The report provides an overview of the skills profile of the population in terms of field and level of education. The profile shows the potential pool of skills available to work in different sectors of the economy.



Leaving Certificate

There were approximately 57,000 Leaving Certificate candidates in 2014, an increase of 2.4% on 2013. With the exception of languages and mathematics, at least two thirds of candidates in the most popular subjects opted to take the higher level paper. There were approximately 52,000 sittings in Leaving Certificate mathematics; of these, over 14,300 (27%) opted to sit the higher level paper. This represents an increase of over 5,900 students taking mathematics at higher level since 2009.

Post-secondary level

Engineering accounted for the majority of post-secondary education holders at 110,000, followed by social science, business and law (SSBL) (67,000) and health and welfare (51,000). Those with agriculture qualifications had the highest share in employment (88%), followed by engineering (77%) while arts/humanities had the highest share of persons unemployed (15%). Approximately three quarters of all employed persons with qualifications in engineering, SSBL and agriculture were working in a related field.

Third level

SSBL accounted for the majority of third level qualification holders (aged 20-64) at 350,000, followed by health and welfare (153,000) and engineering related qualifications (144,000). Engineering and agriculture award holders had the highest shares in employment at 84% each, while arts/humanities had the highest share classified as unemployed (7%). Health/welfare and education qualification holders were the most likely to be employed in a field related to their qualification while those with arts/humanities awards were the least likely to be employed in a related field.

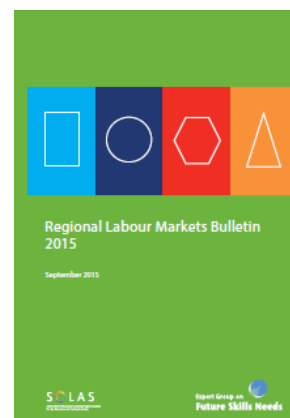
Key findings

- Half of those aged 25-39 years held third level qualifications compared to less than a quarter of those aged 60-64 year olds.
- The number of third level graduates grew for each age cohort between 30-64 years while there were declines in the numbers with upper secondary education or less.
- In 2014, at 38%, Ireland had the third highest share of third level graduates across the EU 28 countries (after Luxembourg and Cyprus), well above the EU average of 27%.
- The likelihood of being in employment increased with educational attainment, with shares in employment at 56% for those with at most a Leaving Cert, rising to 81% for third level graduates in quarter 4 2014.



Regional Labour Markets Bulletin 2015

The Regional Labour Markets Bulletin 2015 was compiled by the Skills and Labour Market Research Unit in SOLAS on behalf of the Expert Group on Future Skills Needs. It provides an analysis of the key labour market indicators for each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West, and West.



Comparisons between Regions

The report highlights the differences across regions with regard to their enterprise landscape, pervasiveness of high value added activities, and aligned to this, the differences in the profile of regional labour markets, including the share of relatively highly skilled occupations in employment. The report also shows that there are a number of similarities across the regions, including the relative size of broad public sector, the type of vacancies advertised through the public employment services, the composition of unemployment, and the skill profile of job seekers.

Employment / Unemployment (Quarter 4 2014)

Dublin and the Mid-East region had the highest employment rates at 66.4% and 65.1% respectively, whereas the Border region had the lowest rate, at 57.4%. All other regions had an employment rate below that of the State. The highest unemployment rates were observed in the Midland (13%) and South-East (12%). The lowest rates were observed in the Mid-East region (8.5%) and Dublin (8.6%).

Education

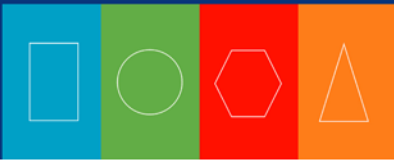
In 2014, the total output from the national education and training system, expressed as awards, amounted to almost 95,000 awards (NFQ 1-10) for the State. The largest numbers of these were in the business & law (22%), health & welfare (21%), and arts & humanities (13%) fields. Dublin accounted for 37% of all national awards (NFQ 1-10).

Enterprise

There were approximately 185,500 active enterprises in the private business economy in Ireland in 2012, the latest date for which such data was available from the CSO. Nationally, the highest number of active enterprises was in wholesale and retail (23%), construction (18%) and professional services (16%). The Dublin region accounted for almost one third of all active enterprises.

Live register

In May 2015, there were approximately 345,600 persons on the Live Register, a year-on-year decrease of approximately 43,100 (11%). The numbers on the Live Register declined in all regions over the period. The most pronounced decline, in relative terms, was observed in the Mid-West region (by 12.2%), followed by Dublin (12%). The South-East reported the smallest decline in relative terms (9.3%).



Vacancy Overview 2014

This report is produced annually by the Skills and Labour Market Research Unit (SLMRU) in SOLAS on behalf of the Expert Group on Future Skills Needs (EGFSN) in order to provide an overview of the demand for labour by identifying trends in advertised job vacancies. In 2014, on average 5,700 vacancies were advertised each month through the Department of Social Protection (DSP) Jobs Ireland website and 2,500 vacancies through the commercial IrishJobs.ie website; this represents an increase in notifications for both sources since 2013.



Occupations

In 2014, DSP Jobs Ireland vacancies were primarily for elementary, personal services and skilled trades occupations. The occupations which appeared most frequently included care workers and home carers (12%), sales assistants (5%) and chefs and kitchen and catering assistants at 4% each. Vacancies notified to IrishJobs.ie were primarily for professional and associate professional occupations, with the following appearing most frequently: IT professionals (11%), Sales, Marketing and related associate professionals (10%), Business, Finance and related associate professionals (8%) and Business, Research and Administrative professionals (7%).

Language skills

Demand for language skills was particularly high for associate professional positions (e.g. business sales executives) followed by sales, professionals and administrative roles. German was the most frequently mentioned language required, followed by French, Spanish and Dutch.

Education / experience required

Vacancies for professional occupations were by far the most likely to require a third level degree qualification. Administrative positions were most likely to require a part or full professional qualification. Sales/customer service positions had the highest share of vacancies with no minimum level of either education or experience required. Finally, managerial vacancies were most likely to request a minimum of two to six years' experience.

Employment permits

Professionals accounted for 69% of all new employment permits issued in 2014, compared to 36% in 2010. There was an increase in the number of new permits issued between 2013 and 2014, relating primarily to the reintroduction of medical employment permits and further increases in the number of permits issued to IT professionals.

Difficult to fill vacancies

Professional occupations (in IT, engineering, science, health, business and limited openings in construction) accounted for two thirds of all difficult to fill mentions, with a further 15% for associate professional occupations (including technicians and sales related).



Lifelong Learning among Adults in Ireland, Quarter 4 2014

In April 2015, the SLMRU in SOLAS published a short bulletin on behalf of the EGFSN on Lifelong Learning among adults in Ireland. One of the EU education and training targets aims is for 15% of 25-64 year-olds to participate in lifelong learning by 2020. This paper is the first in a series which aims to monitor Ireland's progress towards this target by examining the number and share of persons aged 25-64 years who have engaged in lifelong learning activities.

Overview

Of the 2.48 million adults aged between 25 and 64 years in the population, almost 181,000 persons had engaged in lifelong learning activities in the four weeks preceding the survey in Q4 2014. This represents a lifelong learning participation rate of 7.3%.

Most lifelong learning participants had engaged in formal learning activities (almost 119,000 or 66%); 64,800 had engaged in non-formal learning (e.g. courses aimed at improving job-related knowledge or enhancing skills for social or personal purposes).

Lifelong learning participation tends to decline with age.

The higher a person's education attainment level, the more likely adults are to participate in lifelong learning.

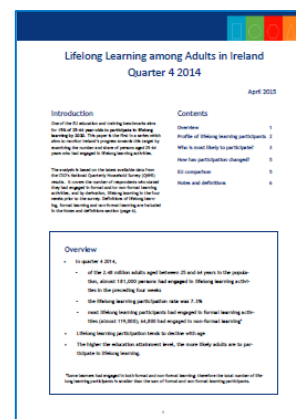
Profile of lifelong learning participant

- 57% of all lifelong learning participants are female
- 26% are aged between 25 and 29 years
- 60% (108,400) are third level graduates
- 57% (almost 103,700 persons) are in employment (mostly in full-time employment)
- 45% (49,200 persons) of employed lifelong learning participants work in high skilled occupations
- The highest shares of employed life-long learning participants work in health/welfare (21%), education (15%), industry (9%) and finance (7%)

Ireland's International ranking

At 7.3% on average for 2013, Ireland was below the EU participation average of 10.5% ; the gap was widest for employed persons, with Ireland's rate being 5.2 percentage points lower than the EU average (6.2% compared to 11.4%); in contrast, at 10.7%, it was above the EU average participation rate (7.7%) for the economically inactive.

In addition, the gap between Ireland and the EU average has widened to 3.2 percentage points in 2013, up from 2.8 percentage points in 2009.





Other Activities & Policy Inputs by the EGFSN in 2015

Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise - Springboard 2015

This report summarises the skills shortages identified in recent reports of the Expert Group on Future Skills Needs. It was developed to provide guidance for providers tendering for higher education places for job seekers through Springboard 2015.

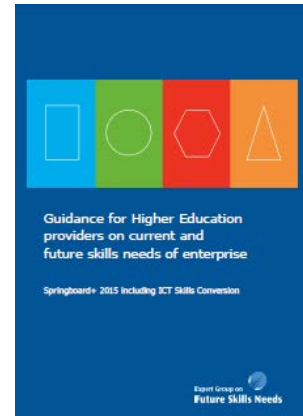
Engagement with Enterprise

Enterprise engagement is of pivotal importance to the progression of Springboard+ participants to employment. Springboard+'s objectives are as follows:

- 1 To help unemployed people to return to sustainable employment.
- 2 To enhance collaboration between enterprise and higher education to design and deliver relevant higher education courses that support job creation and expansion in line with the Government's Action Plans for Jobs.
- 3 To enhance the skills profile of the labour force to meet the targets and objectives of the national ICT skills Action Plan (2014); the 2015 Action Plan for Jobs and the National Skills Strategy (2007).

The skills needs of enterprise prioritised for the Springboard 2015 Call were:

- 1 High-level ICT skills - for the ICT Sector and across all sectors
- 2 Big Data & Analytics skills - specifically the supporting technology within the ICT sector and big data savvy roles across all sectors
- 3 Skills for Manufacturing
- 4 Skills to Trade Internationally - across all sectors
- 5 Skills for International Financial Services
- 6 Construction Skills
- 7 Entrepreneurship - across all sectors
- 8 Creativity, Design & Innovation - across all sectors
- 9 Freight Transport, Distribution and Logistics (FTDL)
- 10 Cross Enterprise Skills





National Skills Strategy 2025

A new National Skills Strategy to 2025 was published by Government in January 2016. The Strategy aims to support the development of a well-educated, well-skilled and adaptable labour force, creating and sustaining a strong pool of talented people of all ages in Ireland. The EGFSN Secretariat provided inputs into the development of the new Strategy.

The Strategy builds on the progress made since the last skills strategy, *Tomorrow's Skills - Towards a National Skills Strategy*, which was published by the EGFSN in 2007.

Since 2007, good progress has been made on a number of targets set in the previous skills strategy, particularly in the following areas:

- The number of learners completing senior cycle at second level increased from 81% to 90.6%. This exceeds the 90% target set for 2020.
- 93% of people aged 20-24 achieved an award at Levels 4-5 or more on the National Framework of Qualifications in 2014. This was an increase of 7% on the baseline year of 2005 and just 1% short of the target for 2020.
- The progression rate to higher education increased by 14 percentage points, from 55% to 69%, while there was an 11 percentage point increase in the number of people in the labour force achieving a qualification at Levels 6-10 on the National Framework of Qualifications.
- Progress was not as strong for some of the other targets in the 2007 strategy. For example, the target to increase the percentages of people in the labour force holding a qualification at Levels 4-5 was not met. A clear challenge also remains in relation to the share of persons with NFQ Level 3 as the highest level of education attained; at 15.4%, this is still nearly double the 2020 target of 7%.

Ireland's National Skills Strategy 2025 sets new indicators of progress for the period to 2025. The publication is available at http://www.education.ie/en/Publications/Policy-Reports/pub_national_skills_strategy_2025.pdf.



National Skills Database

The National Skills Database (NSD), developed and maintained by the Skills and Labour Market Research Unit (SLMRU) of SOLAS, collates all available information on the supply and demand of skills in Ireland. It represents an effective tool for timely analysis and forecasting of the labour market at sectoral and occupational level. Potential imbalances between the demand and supply of skills can be assessed using the wide range of indicators gathered in the NSD.

During 2015 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, JobsIreland.ie)
- Labour force forecasting model
- Occupational employment forecasting models
- Recruitment agency survey (SLMRU).

These data were used throughout the EGFSN sectoral and occupational reports in forecasts of future demand.

Dissemination of information on Future Skills Needs

During 2015, the EGFSN continued to engage with stakeholders to ensure that information on the skills needs of the economy was disseminated to relevant parties. The Chairperson and Secretariat made presentations on skills needs at various conferences and fora throughout the year. These included the National Association of Principals and Deputy Principals Further Education Conference, the Chartered Institute of Management Accountants Big Data Conference, the Irish Hospitality Institute Leadership Conference, the Irish Institute of Training and Development seminar, and the HEA Forward-Look Forum.

In addition, the Group's work continues to be disseminated to guidance counsellors, students (secondary level, further education and training, and higher education), parents and teachers, through targeted websites such as CareersPortal, Qualifax and the Institute of Guidance Counsellors' website. The Group also featured in a number of newspaper features.

All reports published by the EGFSN are available on the website www.skillsireland.ie. Brief presentations, which provide an overview of key findings, are available alongside reports on the website. Printed reports are circulated to mailing list subscribers and an e-alerts system is also in place to electronically distribute the group's reports.

The Expert Group will continue to deepen its level of engagement with stakeholders in 2016 to highlight the nature and extent of the emerging skills needs of the economy.



Implementation of Recommendations in EGFSN Reports

Ongoing monitoring of progress on implementation of recommendations, including a review of sectoral studies after completion, is undertaken by the EGFSN. Sectoral reports are widely disseminated to stakeholders. Those identified with the responsibility of implementing the recommendations are invited to inform the EGFSN of progress on implementation six months after publication of the report.

Freight Skills

A main recommendation in the report on the Freight Transport, Distribution and Logistics (FTDL) sector is the development of a Freight Transport, Distribution and Logistics Skills Engagement Group to improve linkages between employers and education providers and develop the appeal of the sector/industry to attract young talent into it. A management vacancy position in the DIT School of Transport Engineering, Environment and Planning with responsibility for the NITL has now been filled and a strategy for implementing this recommendation has been developed.

The FTDL engagement group will actively work internally and externally on the application process for the establishment of the FTDL Skillnets training group in 2016. Over 100 companies within the Freight Transport, Distribution and Logistics sector participated in Skillnets training across 30 different Skillnets networks in 2015.

Through the new apprenticeships initiative, an industry-led group is currently working on development of a new apprenticeship for HGV drivers. A date for completion and roll out of the new apprenticeship will be determined by the group, with reference to the national requirements for validation and designation of the new programme. SOLAS, in partnership with the HEA, is continuing to support the work of this group.

ETBs and the Momentum programme planned to make 617 HGV-related training places available for unemployed people in 2015. ETBs are currently planning 2016 provision (across all programmes) in conjunction with SOLAS and expect to have this process completed by the end of March.

The Irish International Freight Association are aiming for a late March 2016 launch for an updated Freight Forwarders and Custom Brokers training programme.

DIT are engaging in discussion with the Chartered Institute of Logistics & Transport (CILT) regarding the development of a range of CPD programmes and a Level 7 ordinary Degree in Logistics & Supply Chain Management.

DIT will act as the lead centre for third level education institutes delivering FTDL programmes to further promote links between institutes currently providing programmes in the Logistics & Supply Chain Management area to ensure relevance of programmes and readiness of graduates entering the market place. DIT are to undertake a study which will assess key stakeholders' perceptions of attracting young talent into the FTDL industry.

Cork Education and Training Board (CETB) Training Advisors are visiting employers to assess their training needs, such as in the area of Heavy Vehicle Mechanics. Information is also available through the general marketing of the CETB education and training provider's online portals and prospectus.



ICT Skills

Globally, ICT is in the midst of a growth and innovation phase which is impacting on businesses across all sectors of the economy. This includes the adoption of cloud computing, mobile devices, the Internet of Things and Big Data Analytics. The availability of high-level ICT skills is a unique selling point in attracting mobile ICT investment and growing businesses across all sectors.

The 2013 EGFSN report *Addressing Future Demand for High-Level ICT Skills* forecast continuing strong demand from employers for people with high level ICT skills across the economy, leading to 44,500 new job openings arising from expansion and replacement demand up to 2018. Nearly 90% of these job openings are at NFQ Level 8+.

In a direct response to the identified high-level ICT skills demand in the report, the Government in 2012 launched the *ICT Skills Action Plan*, which was subsequently updated in 2014. The Department of Jobs, Enterprise and Innovation co-chairs a Steering Group which oversees implementation of the *ICT Skills Action Plan*. The Government has set a target of meeting 74% of the ICT skills demand from domestic supply by 2018. One of the key measures of the *ICT Skills Action Plan 2014* was the competitive call issued in 2014 for extra ICT places on Level 8 programmes. However, the number of places filled fell short of target.

The provision of ICT courses has been a constant feature of the Springboard initiative. Analysis of the Springboard+ 2015 ICT places outcomes to date indicates significant uptake of the places provided. Springboard+ 2015 ICT is offering approximately 900 places in Spring 2016.

Awareness raising among CAO applicants regarding available ICT employment opportunities is a key issue. There is an industry-led group with ICT Ireland set up to coordinate business participation in Science Foundation Ireland's Smart Futures in schools and to engage in a wide range of practical initiatives to inform school leavers and parents run through an "adopt a school" programme between enterprises and schools.

Following a tendering process managed by Enterprise Ireland, a team has been appointed to design, develop and operate a website portal to promote Ireland internationally as a destination for high level ICT skills, including expatriate talent, with view to a launch in May 2016.

Big Data and Analytics Skills

The EGFSN report, *Assessing the Demand for Big Data and Analytics Skills in Ireland, 2013-2020*, which was published in 2014, examined the demand for Big Data and analytics roles and their related skills, and relevant current and planned education and training output. The EGFSN report proposed actions across a range of areas to address gaps identified between supply and demand and to assist in harnessing the considerable economic and social potential of this area. As part of the monitoring of the implementation of recommendations in the report, a range of data analytics programme implementation and innovations have been reported, including the following examples:

- Data Analytics programmes in areas identified by the EGFSN as in demand were included in the Springboard 2015 and 2016 Call for Programmes issued by the Higher Education Authority. The development of a portal to attract international ICT and data analytics talent, as recommended in the EGFSN ICT Skills report published in 2013, is also underway.



- DCU has a strong commitment to both education and research in Big Data and Analytics, with a particular emphasis on engagement with industry.
- DIT is providing data analytic education across a wide range of its programmes.
- UCD's School of Computer Science are proposing a undergraduate Minor award in Data Science across the university from September 2016.
- CIT's Higher Diploma in Science in Data Science & Analytics is focussed on the development of deep analytical talent.
- E3- the Engineering and Environmental Institute, is Trinity's flagship project for the next five years. It is a response to industry's needs for highly-qualified graduates in ICT and STEM subjects. A main theme of E3 will be quantitative methods, big data and the digital ecosystem.
- In the University of Limerick, a new programme entitled "Higher Diploma in Data Analytics and Software Development" commenced in September 2015. It is supported under the Springboard initiative and designed in consultation with several businesses in the West/Mid-West regions.
- Letterkenny IoT has developed a level-9 Postgraduate Diploma and MSc in Big Data Analytics, while IoT Tallaght has developed a new degree programme B. Sc. Computing with Data Analytics which will come available as an option for those on existing computing programmes in 2016-17.
- The EGFSN Secretariat has presented at a number of business fora on the benefits for companies in developing their data analytics capability. SFI's funded INSIGHT, ADAPT and CONNECT research centres are focused on the broad area of big data, and resource from these centres is an important facility for delivering education on data analytics and the Research Centre story to schools and the community more broadly. Analytical skills Talent occupations have also been included on the Employment Permits High Skills Eligible Occupation List.



2016 Work Programme

Skills for the Biopharma Sector

In 2016, the EGFSN will conduct a review of the supply and demand of the skills required to meet the needs of the BioPharma sector, including a profiling of current provision. The report will recommend actions required to address any identified gaps in skills provision.

The report is expected to be published in Q3 2016.

Skills for Design

During 2016 the EGFSN will undertake a scoping exercise on the nature of the design skills required across the economy to meet the future needs of enterprises in both design-intensive and non-intensive sectors. This will include a profiling of the current provision of design skills.

It is envisaged that the report will be published in Q4 2016.

Annual Skills and Labour Market reports

The Skills and Labour Market Research Unit in SOLAS will prepare a number of important annual reports on behalf of the Expert Group on Future Skills Needs in 2016. These will include:

- *Vacancy Overview 2015*, identifying skills for which there is currently a demand in the Irish labour market (due for publication in Q2 2016).
- *National Skills Bulletin 2016*, outlining skills demand by occupation (mid-2016).
- *Monitoring Ireland's Skills Supply 2016*, providing a profile of trends in education and training output (mid-2016).
- *Regional Labour Markets Bulletin 2016* - providing an analysis of key labour market indicators for the 8 NUTS III regions (mid-2016).

Lifelong Learning

The Skills and Labour Market Research Unit in SOLAS will follow up its 2015 bulletin on Lifelong Learning amongst adults by examining the number and share of persons aged 25-64 years who have engaged in lifelong learning activities. It is anticipated that an updated bulletin will be published in Q2 2016.



National Skills Strategy 2025

The new National Skills Strategy to 2025 which was published by Government in January 2016 reflects changes which have taken place in the education and training landscape over the past number of years years, including new strategies for Higher Education and Further Education & Training, the establishment of SOLAS, and the setting up of Regional Skills Fora at NUTS III level.

A key commitment in the National Skills Strategy is the establishment of a new National Skills Council which will oversee research, advise on prioritisation of identified skills needs and how to secure delivery of identified needs. The key elements of the Expert Group on Future Skills Needs model of analysis and horizon scanning, with close engagement with enterprise, will be maintained. The Skills Strategy indicates that EGFSN and its mandate will be refreshed to align its role in researching and identifying future skills needs with the new architecture, including the National Skills Council.

The Expert Group welcomes the publication of the National Skills Strategy and looks forward to working closely with the National Skills Council, and in particular contributing to the work of the Council through the provision of research and analysis on the future skills needs of the enterprise sector.

The Expert Group also will continue to to deepen its level of engagement with stakeholders in 2016 to highlight the nature and extent of the emerging skills needs of the economy.



Appendix 1: Recent Publications by the Expert Group on Future Skills Needs (2013 - 2016)

Report	Publication Date
Vacancy Overview 2015	May 2016
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard+ 2016	February 2016
Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020	November 2015
Regional Labour Markets Bulletin 2015	October 2015
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2015	August 2015
National Skills Bulletin 2015	July 2015
Vacancy Overview 2014	May 2015
Lifelong Learning among Adults in Ireland, Quarter 4 2014	May 2015
A Study of the Current and Future Skills Requirements of the Marine/Maritime Economy to 2020	April 2015
The Expert Group on Future Skills Needs Statement of Activity 2014	April 2015
Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015 - 2020	February 2015
Regional Labour Markets Bulletin 2014	September 2014
Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2014	August 2014
National Skills Bulletin 2014	July 2014
Vacancy Overview 2013	May 2014
Assessing the Demand for Big Data and Analytics Skills, 2013 - 2020	May 2014
The Expert Group on Future Skills Needs Statement of Activity 2013	April 2014
Regional Labour Markets Bulletin 2013	March 2014
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2014	February 2014
Addressing Future Demand for High-Level ICT Skills	November 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2013	July 2013
National Skills Bulletin 2013	July 2013
Future Skills Requirements of the Manufacturing Sector to 2020	April 2013
The Expert Group on Future Skills Needs Statement of Activity 2012	April 2013
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2013	February 2013
Vacancy Overview 2012	February 2013

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