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# A Terms of Reference

The Enterprise Strategy Group was established by An Tánaiste and Minister for Enterprise, Trade and Employment, Mary Harney TD, in July 2003. Membership is detailed in Appendix B.

Under its Terms of Reference, the Enterprise Strategy Group was requested to develop a medium-term enterprise strategy, and to propose and prioritise national policy responses which will:

- » Strengthen the competitiveness of Ireland's enterprise environment
- » Promote the emergence of an innovation- and knowledge-driven economy
- » Sustain those industries already providing employment
- » Underpin the industries of the future where Ireland is or can become a substantial player, with particular reference to segments of the ICT, life sciences, food, financial services and internationally traded services sectors
- » Encourage business start-ups and companies with potential for growth, and
- » Examine the scope for increasing the value of sectors to the Irish economy as a whole.

The Enterprise Strategy Group was asked to take account of:

- » Long-term international trends in globalisation, EU enlargement, technology and regulation, as well as in the structure of industries and markets, and
- » Ireland's increased prosperity and changing cost and competitiveness base, future trends in demography, the regulatory environment, and our physical, R&D and technological infrastructures.

Against this background, the Enterprise Strategy Group was asked to produce a strategy based on a vision which recognises the desirability of appropriate balance between:

- » Business sectors in the economy
- » Foreign and domestic enterprise ownership
- » Regions as set out in the National Spatial Strategy, and
- » Types of economic activity, such as research, manufacturing and commercial services.

# B Membership of the Enterprise Strategy Group

## Enterprise Strategy Group Members

Chair: **Mr Eoin O'Driscoll**, Managing Director, Aderra Limited

**Mr Alan Dwyer**, Managing Director, Eurostyle Limited

**Mr Hugh Friel**, Chief Executive Officer, Kerry Group plc

**Mr Des Geraghty**, Former General President of SIPTU

**Mr David Griffin**, Chief Risk Officer, AIB Bank

**Professor Rita Gunther McGrath**, Associate Professor, Columbia University, Graduate School of Business, New York

**Mr Nicky Hartery**, Vice President, EMEA Operations, Dell

**Professor John Hegarty**, Provost, Trinity College, Dublin

**Dr James G. Hoey**, Managing Director, Masonite Ireland

**Mr Frank Kenny**, Managing Partner, Delta Partners

**Ms Liavan Mallin**, Chairperson & CEO, Zalco Investments Limited

**Mr Martin McVicar**, Managing Director, Combilift Limited

**Dr Mary Meaney**, Director, Institute of Technology Blanchardstown

**Dr Rory O'Donnell**, Director, National Economic and Social Council

**Dr Reg Shaw**, Managing Director, Wyeth Medica Ireland

**Professor John Sutton**, London School of Economics

## Enterprise Strategy Group Secretariat

**Mr Brian Cogan**, Divisional Manager, Enterprise Division, Forfás

**Ms Marie Bourke**, Department Manager, Enterprise Division, Forfás

**Ms Maria Ginnity**, Department Manager, Enterprise Division, Forfás

**Ms Maria Hurley**, Senior Policy Analyst, Enterprise Division, Forfás

**Mr Adrian Devitt**, Senior Policy Analyst, Enterprise Division, Forfás

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# C Membership of the Advisory Groups

## Competitiveness Advisory Group

Chair: **Dr James G. Hoey**, Managing Director, Masonite Ireland

**Dr Frank Barry**, Lecturer, Department of Economics, University College Dublin

**Mr Donal Byrne**, Chairman, Cadbury Ireland Limited

**Dr Robert Berney**, Managing Director, P.C. Holdings Limited

**Mr Brendan Butler**, Director Enterprise, Irish Business and Employers Confederation

**Mr Roger Fox**, Director of Planning, Research and EU Affairs, FÁS

**Dr Paul Gorecki**, Director of Monopolies Division, The Competition Authority

**Dr Rory O'Donnell**, Director, National Economic and Social Council

**Ms Katrina Polaski**, Senior Policy Analyst, Sustainable Energy Ireland, Enterprise Ireland

**Mr Jim Power**, Economist, Friends First Life Assurance Company Limited

Secretary: **Mr Andrew McDowell**, Department Manager, Competitiveness and Innovation Division, Forfás

**Mr Garrett Murray**, Graduate Trainee, Competitiveness and Innovation Division, Forfás

## Education, Skills and Labour Advisory Group

Chair: **Dr Mary Meaney**, Director, Institute of Technology Blanchardstown

**Mr Senan Cooke**, Training and Communications Manager, Waterford Crystal Limited

**Mr Fergal Costello**, Head of Policy Planning, Higher Education Authority

**Mr Des Geraghty**, Former General President of SIPTU

**Dr Colette Henry**, Head of Department of Business Studies Centre for Entrepreneurship Research, Dundalk Institute of Technology

**Dr Sean McDonagh**, Director, Skills Initiative Unit, Department of Education and Science

**Professor Philip O'Connell**, Senior Research Officer, Economic and Social Research Institute

**Mr Bill O'Gorman**, Management and Marketing Department, University College Cork

**Dr Pdraig O'Murchu**, Academic Relations Manager, Intel Ireland Limited

**Mr Gerry Pyke**, Secretary, FÁS

**Mr Sean Silke**, Human Resources Director, Medtronic Ireland Limited

Secretary: **Dr Catherine Kavanagh**, Department Manager, Expert Group on Future Skills Needs, Enterprise Division, Forfás

### Infrastructure Advisory Group

Chair: **Mr Nicky Hartery**, Vice President, EMEA Operations, Dell

**Mr John Brady**, Strategic Development, IT Strategic Support, AIB Bank

**Dr Brian Coghlan**, Senior Lecturer, Trinity College, Dublin

**Mr John Connolly**, Marketing Manager, SWS Group

**Mr Sean Corkery**, Vice President, EMEA Manufacturing, Dell

**Mr Dermot Ennis**, Senior Manager, eBusiness and Payments, AIB Bank

**Dr Richard Hirsh**, Senior Scientific Programme Officer, Science Foundation Ireland

**Mr Bill Kearney**, Software Lab Manager, IBM Ireland

**Ms Deirdre Lyons**, Manager, Strategic Business Group, IDA Ireland

**Mr Austin McCabe**, Managing Director, Symantec Ireland

**Mr Kevin McCarthy**, Business Development Manager, Strategic Business Group, IDA Ireland

**Ms Patricia McLister**, Manager, Software International Services Division, Enterprise Ireland

**Mr Maurice Mortell**, Chief Executive Officer, Data Electronics

**Mr Kevin Murray**, Financial Controller, Buy4Now Limited

**Mr Martin O'Riordan**, Chief Technology Officer, Hibernia Atlantic

**Mr Pat Quigley**, Strategic Planning Manager, Dell

Secretary: **Mr Adrian Devitt**, Senior Policy Analyst, Enterprise Division, Forfás

**Mr Andrew Stokes**, Assistant Economist, Enterprise Division, Forfás

### Engineering Advisory Group

Chair: **Mr Martin McVicar**, Managing Director, Combilift Limited

**Mr George Bennett**, Manager, Engineering and Consumer Products Division, IDA Ireland

**Mr Paddy Byrne**, Chairman, Burnside Autocyl Limited

**Mr Tony Donegan**, Managing Director, Kent Stainless Limited

**Mr Kevin Kavanagh**, Manager, Engineering Department, Enterprise Ireland

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**Mr Maurice Moynihan**, Group Managing Director, Odenberg Engineering Limited

**Mr Frank O'Connor**, Plant Manager, Thermoking Ireland Limited

**Mr Chris Saunders**, Managing Director, Kostal Ireland

**Mr Kevin Sherry**, Manager, Investment Services, Enterprise Ireland

Secretary: **Ms Áine McDonagh**, Economist, Enterprise Division, Forfás

### **Food and Drink Advisory Group**

Chair: **Mr Hugh Friel**, Chief Executive Officer, Kerry Group plc

**Mr Dan Browne**, Managing Director, Dawn Meats Group

**Ms Marian Byrne**, Principal Officer, Department of Agriculture and Food

**Mr Brian Duffy**, Managing Director, Diageo

**Mr Sean Higgins**, Divisional Manager, Food and Consumer Products, Enterprise Ireland

**Mr John Moloney**, Group Managing Director, Glanbia plc

**Mr Billy O'Regan**, Group Executive, Northern Foods plc

Secretary: **Ms Mary Twomey**, Senior Policy Analyst, Enterprise Division, Forfás

### **Foreign Direct Investment Advisory Group**

Chair: **Mr Frank Kenny**, Managing Partner, Delta Partners

**Mr Peter Callan**, Managing Director, Sennheiser

**Mr Mike Conroy**, Director, Contact Centre Solutions, Nortel

**Mr Ken Doyle**, Chief Executive Officer, Luzern Solutions Limited (Ireland)

**Mr John Flood**, Director, PARC Group

**Mr Noel Fogarty**, Vice President of Operations, Boston Scientific Ireland Limited

**Mr Mark Gantly**, Head of TC Division, Hewlett-Packard

**Mr Gus Jones**, Manager, ICT Division, IDA Ireland

**Mr Paraig Kenny**, Chief Operating Officer, Pioneer Investment Management Limited

**Mr Sean Kinsella**, former President, Thermoking Europe Limited

**Mr Dan O'Connor**, Chief Executive for Europe, General Electric Capital Woodchester Limited

**Dr Reg Shaw**, Managing Director, Wyeth Medica Ireland

**Mr Pat Wall**, Partner, PricewaterhouseCoopers

Secretary: **Ms Maria Ginnity**, Department Manager, Enterprise Division, Forfás

## Global Markets and Business Models Advisory Group

Chair: **Mr Nicky Hartery**, Vice President, EMEA Operations, Dell

**Mr Sean Corkery**, Vice President, EMEA Manufacturing, Dell

**Mr Alan Dwyer**, Managing Director, Eurostyle Limited

**Mr Hugh Friel**, Chief Executive Officer, Kerry Group plc

**Professor Rita Gunther McGrath**, Associate Professor, Columbia University, Graduate School of Business, New York

**Dr David Hanna**, Divisional Manager, International Financial Services Division, IDA Ireland

**Mr Michael Loftus**, General Manager, Becton Dickinson and Company

**Mr Tony O'Connell**, Vice President, EMEA Supply Chain, Dell

**Mr Paul Rellis**, Director, Microsoft Ireland

**Mr Brody Sweeney**, Chief Executive Officer, O'Brien's Irish Sandwich Bars Limited

Secretary: **Ms Maria Hurley**, Senior Policy Analyst, Enterprise Division, Forfás

**Ms Karen Thompson**, Assistant Economist, Enterprise Division, Forfás

## Consumer Goods Advisory Group

Chair: **Ms Liavan Mallin**, Chairperson and Chief Executive Officer, Zalco Investments Limited

**Mr George Bennett**, Manager, Engineering and Consumer Products Division, IDA Ireland

**Mr Richard Broderick**, Managing Director, Georgia-Pacific Ireland Limited

**Ms Susan Doyle**, Director, Irish Clothing and Textiles Alliance

**Mr Alan Dwyer**, Managing Director, Eurostyle Limited

**Mr Desmond Fahey**, Chief Executive Officer, Dublin Business Innovation Centre

**Mr Constantin Gurdgiev**, Lecturer, Department of Economics, Trinity College Dublin

**Mr Tom MacGuinness**, Managing Director, Horseware Products Ireland

**Professor Tom McCarthy**, Business School, Dublin City University

**Mr Colin McGookin**, Manufacturing Director, Waterford Crystal Limited

**Mr John O'Connor**, Head of School of Art and Design, Dublin Institute of Technology

**Mr Giles O'Neill**, Manager, Consumer Furniture and Timber, Enterprise Ireland

**Mr John Russell**, Plant Manager, Oakley Ireland Optical Limited

Secretary: **Dr Fraser Hosford**, Economist, Competitiveness and Innovation Division, Forfás

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## Indigenous Industry Advisory Group

Chair: **Mr David Griffin**, Chief Risk Officer, AIB Bank

**Mr Dermot Byrne**, General Manager Commercial, Electricity Supply Board

**Mr Michael Cawley**, Chief Operating Officer and Deputy Chief Executive, Ryanair

**Mr Peter Conlon**, Chairman and Chief Executive Officer, Xsil Limited

**Ms Bernadette Cullinan**, Chief Operating Officer, Performix Technologies Limited

**Mr Michael Dowling**, Director, Kerry Group plc

**Mr Sean Hannick**, Managing Director, Killala Precision Components Limited

**Mr Kevin Henry**, Managing Director, SerCom Solutions

**Mr Michael Horgan**, Deputy Chief Executive, Royal College of Surgeons in Ireland

**Ms Helen Johnston**, Managing Director, SURG Equipment Limited

**Mr Gerard Keenan**, Managing Director, Richard Keenan and Company

**Mr Ian Martin**, Managing Director, Martin Services Limited

**Mr Pat Ridge**, Food Manufacturer

**Ms Julie Sinnamon**, Head of Strategic Change Unit, Enterprise Ireland

Secretary: **Ms Marie Bourke**, Department Manager, Enterprise Division, Forfás

**Dr Fraser Hosford**, Economist, Competitiveness and Innovation Division, Forfás

## Internationally-Traded Services Advisory Group (Activities)

Chair: **Mr Nicky Hartery**, Vice President, EMEA Operations, Dell

**Mr Sean Corkery**, Vice President, EMEA Manufacturing, Dell

**Mr Ollie Daniels**, Chief Executive Officer, Atlantic Technology Corridor

**Mr Ken Doyle**, Chief Executive Officer, Luzern Solutions Limited (Ireland)

**Dr Martin Fahy**, Accountancy and Finance Department, National University of Ireland, Galway

**Mr Paul French**, Founder and Co-Chairman, Equitant Limited

**Ms Ann-Marie Gill**, European Director of Human Resources, GE Financial Insurance and GE Mortgage Insurance

**Mr Grellan Kelly**, Managing Director, GK Solutions Limited

**Mr John McLoughlin**, Vice President Teradata Ireland and Principal, NCR Global Solutions Limited

**Mr Andrew Mulhall**, Financial Shared Services Director, PepsiCo Ireland Limited

**Mr Pat Quigley**, Strategic Planning Manager, Dell

**Mr John Whelan**, Partner, A&L Goodbody

Secretary: **Ms Maria Hurley**, Senior Policy Analyst, Enterprise Division, Forfás

## Internationally-Traded Services Advisory Group (Sectors)

Chair: **Mr John Flood**, Director, PARC Group

Secretary: **Ms Maria Ginnity**, Department Manager, Enterprise Division, Forfás

**Mr Shane Quinlan**, Assistant Economist, Enterprise Division, Forfás

This Advisory Group comprised a number of sub-groups as follows:

### Healthcare

Chair: **Mr Michael Horgan**, Deputy Chief Executive, Royal College of Surgeons in Ireland

**Mr Vincent Barton**, Head of Healthcare Practice, Prospectus Strategy Consultants

**Mr Michael Dempsey**, Managing Director, Bristol Myers Squibb Pharmaceuticals Limited

**Mr Patrick Farrell**, Chief Executive Officer, Irish Bankers' Federation

**Mr David Hanly**, Management Consultant

**Mr David Harrison**, Chief Executive Officer, Intuition Publishing Limited

**Mr James M. Sheehan**, Orthopaedic Surgeon, Blackrock Clinic

### Education

Chair: **Professor Joyce O'Connor**, President, National College of Ireland

**Mr Tom Boland**, Chief Executive Officer, Higher Education Authority

**Dr Tom Collins**, Director, Dundalk Institute of Technology

**Mr Philip Curtis**, Admissions Officer, Royal College of Surgeons in Ireland

**Mr Diarmuid Hegarty**, Chairman, Griffith College Dublin

**Mr Tom Higgins**, President's Office, National College of Ireland

**Mr Michael Horgan**, Deputy Chief Executive, Royal College of Surgeons in Ireland

**Mr Andrew Kearns**, President, Portobello College

**Mr Joe McGarry**, Secretary General, Council of Directors of Institutes of Technology

**Mr Michael McGrath**, Director, Council of Heads of Irish Universities

**Dr Danny O'Hare**, Head of the Information Society Commission and former President of Dublin City University

**Dr Sean Rowland**, Executive Chairman, Hibernia College

### Professional Services and Consultancy

Chair: **Mr Peter Gallagher**, Partner, PA Consulting Group

**Mr Ken Belshaw**, Group Managing Director, Grafton Recruitment

**Ms Clara Clarke**, Managing Director, Clara Clarke Event Management Limited

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**Ms Caroline Duggan**, Manager, Envision Management and Marketing Consultants

**Ms Mary Harrison**, Chief Executive Officer, Optimum Limited

**Mr Seamus Mulconry**, Partner, Accenture

**Dr Vincent O'Malley**, Senior Environmental Consultant, Environmental Policy Department, Enterprise Ireland

**Mr David Sanfey**, Partner, Head of Commercial Department, A&L Goodbody

**Mr Anthuan Xavier**, Managing Partner, BDO Simpson Xavier

#### **Creative Industries, Broadcast/ Film/ Media**

Chair: **Mr Ossie Kilkenny**, President, OJ Kilkenny and Associates

**Mr Simon Jones**, Managing Director, Media Lab

**Mr James Morris**, Chairman, TV3 Television Network Limited

**Ms Ann O'Connell**, Partner, PricewaterhouseCoopers

**Ms Sinead Parker**, Director, PricewaterhouseCoopers

#### **Design**

Chair: **Mr Hugh Wallace**, Managing Director, Douglas Wallace Architects

**Mr Donal Bolger**, Founder, BLG Financial Consultants

**Ms Marian Cody**, Managing Director, Tipperary Crystal Designs Limited

**Mr Neil Condron**, Managing Director, XMI Design Limited

**Mr Jim Dunne**, Managing Partner, Enterprise IG Limited

**Mr Jamie Helly**, Managing Director, Dynamo

**Ms Lucy McCaffrey**, Director, Lucy McCaffrey and Company

**Mr Matt McNulty**, Chairman, Design Ireland Limited

**Mr John O'Mahony**, Director, O'Mahony Pike Architects

**Ms Áine Rooney**, Executive Manager, Design Ireland Limited and HR Manager, Douglas Wallace Architects

**Mr Brian Stephen**, Managing Director, Design Partners Limited

**Professor Angela Woods**, Head of Faculty of Design, National College of Art and Design

**Mr Ian Young**, Managing Director, Marketing Management, Irish International Group

### Construction/ Utilities/ Project Management/ Facilities Management

Chair: **Dr Frank O’Kane**, Managing Director, Mercury Engineering Group

**Mr Fred Barry**, Director, Dublin Operations, Jacobs Engineering

**Mr Pdraig Byrne**, Commercial and Maintenance Director, Dalkia Limited

**Mr Pat Gilroy**, Managing Director, Dalkia Limited

**Mr Peter Langford**, President, Institution of Engineers of Ireland

**Mr John McGowan**, Vice President, Technology and Manufacturing Group, and Director, Corporate Services, Intel Corporation

**Mr Don Moore**, Managing Director, ESB International

### Maritime and Aviation Services

Chair: **Mr Glenn Murphy**, Director, Irish Maritime Development Office

**Mr Brian Byrne**, Chief Executive Officer, Shannon Foynes Port Company

**Ms Liz Barry**, Director and Head of Corporate Affairs, Airbus Financial Services

**Mr Tom Corrigan**, Mechanical and Transport Engineering, Dublin Institute of Technology, Bolton Street

**Mr Kevin Cribben**, Port Facilitator, Aughinish Alumina Limited

**Mr Tony Merrigan**, Marketing Manager, Irish Aviation Authority

**Ms Leonora O’Donovan**, Director of Business Development, NITL

**Mr Paul Packard**, Head of Maritime Industries, Specialised Finance, Bank of Ireland Corporate Banking

**Mr Edward Sweeny**, Director of Training and Education, NITL

### Agricultural Services

Chair: **Dr Alastair McGuckian**, Chairman, Masstock Limited

**Mr Tom Butler**, Managing Director, FBA Laboratories Limited

**Mr Tom Corr**, Director, Gaynor, Corr and Associates

**Dr Owen Doyle**, Department of Crop Science, Horticulture and Forestry, University College Dublin

**Mr Philip Farrelly**, Managing Director, Philip Farrelly and Company

**Mr Gerard Keenan**, Managing Director, Richard Keenan and Company

**Mr Tim Philips**, Chief Executive Officer, International Sport Horse Show

**Mr Louis Ronan**, Director, Enfer Technology Limited

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## Medical Technologies Advisory Group

Chair: **Mr Bernard Collins**, Chairman, VHI Healthcare and former Vice President of International Operations, Boston Scientific Corporation

**Mr Seamus Carroll**, New Business, Medical Technologies Division, IDA Ireland

**Mr James Coleman**, Chief Executive Officer, Nova Science Limited

**Mr Brendan Farrell**, President, Trinity Biotech plc

**Mr Pat Gallagher**, General Manager, Baxter Healthcare Limited

**Ms Sharon Higgins**, Director, Irish Medical Devices Association

**Mr Frank Kenny**, Managing Partner, Delta Partners

**Mr Dick Lenehan**, Manager, Industrial High Growth Start-Ups, Lifesciences and Chemicals Department, Enterprise Ireland

**Mr John O'Shaughnessy**, Managing Director, MedNova Limited

**Mr Peter Walsh**, Vice President, Global Operations, Medtronic International

Secretary: **Mr Martin Craig**, Chief Financial Officer, Forfás

**Ms Karen Thompson**, Assistant Economist, Enterprise Division, Forfás

## Pharmaceutical/Biotechnology Advisory Group

Chair: **Dr Reg Shaw**, Managing Director, Wyeth Medica Ireland

**Professor Tom Cotter**, Department of Biochemistry, University College Cork, Chief Executive of EiRx Therapeutics and founder, Luxcel Biosciences

**Professor Desmond Fitzgerald**, Department of Clinical Pharmacology, Royal College of Surgeons in Ireland, Chairman of Health Research Board and Director, Dublin Molecular Medicine Centre, University College Dublin

**Mr Joe Harford**, President, Economic and Social Research Institute and Chief Executive Officer, Yamanouchi Ireland Limited

**Dr Noel Heaney**, Director, BristolMyersSquibb

**Dr Cormac Kilty**, Chief Executive Officer, Biotrin Ireland

**Mr Dick Lenehan**, Manager, Industrial High Growth Start-Ups, Lifesciences and Chemicals Department, Enterprise Ireland

**Professor Anita Maguire**, ICSTI and Department of Chemistry, University College Cork

**Dr David Melody**, ICSTI and former Head R&D, Henkle Loctite Ireland

**Dr Matt Moran**, Director, Irish Pharmaceutical and Chemical Manufacturers Federation and Director, Irish BiIndustries Association

**Ms Anne Nolan**, Chief Executive Officer, Irish Pharmaceutical and Healthcare Association

**Dr Conor O'Brien**, Chairperson, Irish Pharmaceutical and Chemical Manufacturers Federation

**Mr Barry O'Leary**, Manager, Pharmaceuticals Division IDA Ireland and Director, Dublin Molecular Medicine Centre, University College Dublin

**Mr Peter Sandys**, Director, Seroba BioVentures

**Mr Pdraig Somers**, Managing Director, Helsinn Chemicals Ireland Limited

**Dr Maurice Treacy**, Director of Biotechnology, Science Foundation Ireland

Secretary: **Dr Eamonn Cahill**, Senior Policy Analyst, Enterprise Division, Forfás

### Research, Development and Innovation Advisory Group

Chair: **Mr Martin McVicar**, Managing Director, Combilift Limited

**Dr Leonora Bishop**, Independent Biotechnology Consultant

**Mr Ian Cahill**, Chairman, LM Ericsson Limited and Director, National Institute of Technology Management

**Mr James Coleman**, Chief Executive Officer, Nova Science Limited

**Mr Enda Connolly**, Divisional Manager, IDA Ireland

**Mr Shay Fitzmaurice**, Managing Editor, Bradan Media Sales Limited

**Professor John Hegarty**, Provost, Trinity College, Dublin

**Mr Daniel Hickey**, Managing Director, All in All Ingredients Limited

**Dr Richard Hirsh**, Senior Scientific Programme Officer, Science Foundation Ireland

**Ms Helen Keelan**, Strategic Development Manager, Intel Ireland Limited

**Mr Terry Landers**, Head of Government Affairs, Microsoft Ireland

**Mr Donal Lawlor**, Managing Director, Trend Technologies Mullingar Limited

**Dr Joseph McBreen**, Managing Director, Connaught Electronics Limited

**Dr Sean McCarthy**, Managing Director, Hyperion Limited

**Mr Tom McManus**, International Vice President, EMEA, Johnson & Johnson

**Mr Dan Maher**, Head of Technology Strategy, ACT Venture Capital Limited

**Dr Eucharia Meehan**, Head of Research Programmes, Higher Education Authority

**Mr Barry Moore**, European Patent Attorney, Hanna Moore Curley Limited

**Mr Pa Nolan**, Director, FexCo Limited

**Dr Conor O'Carroll**, Assistant Director of Research Policy, Conference of Heads of Irish Universities

**Mr Feargal Ó Móráin**, Director, Science and Innovation and Corporate Support Services, Enterprise Ireland

**Mr Oliver Tatton**, Chief Executive, Daon

Secretary: **Mr Seamus Bannon**, Department Manager, Competitiveness and Innovation Division, Forfás

**Mr Declan Hughes**, Department Manager, Science and Technology Division, Forfás

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# D List of Submissions

American Chamber of Commerce Ireland  
Association of Chief Executive Officers of the City and County Enterprise Boards  
Association of EC Business and Innovation Centres in Ireland  
Atlantic Technology Corridor  
Avoncourt Vacuum and Pressure Formers  
Border, Midland and Western Regional Assembly  
Bradley McGurk Partnership  
Business in the Community Ireland  
Chambers of Commerce of Ireland  
Commergy Limited  
Commission for Energy Regulation  
Competition Authority  
Conference of Heads of Irish Universities  
Cork Business Innovation Centre  
Cork Electronics Industry Association  
Cork Institute of Technology, Department of Education Development  
Council for the West  
Council of Directors of Institutes of Technology  
Design Ireland  
Digital Hub  
Donegal Local Development Company  
Drogheda Partnership Company  
Dublin Business Innovation Centre  
Dublin Chamber of Commerce  
Dublin City Development Board  
Dublin Molecular Medicine Centre  
Economists Network, TASC  
Eircom  
Electronic Product Services Limited  
Engineering Solutions International Limited  
Enterprise Ireland  
Fanning, Eugene

FÁS, Director General's Office  
FÁS, Excellence Through People  
Faulkner Export Packaging Limited  
Feeney, Paul  
Financial Services Ireland  
Galway Mayo Institute of Technology, Department of Industrial and Mechanical Engineering  
Galway Mayo Institute of Technology, School of Business  
German Irish Chamber of Industry and Commerce  
Higher Education Authority  
IAWS Group plc  
ICT Ireland  
IDA Ireland  
Industry Research and Development Group  
Inner City Enterprise  
Institution of Engineers of Ireland  
InterTradelreland  
Irish Business and Employers Confederation  
Irish Clothing and Textiles Alliance  
Irish Congress of Trade Unions  
Irish Council for Science, Technology and Innovation  
Irish Engineering Enterprises Federation  
Irish Exporters Association  
Irish Forest Industry Chain  
Irish Medical Devices Association  
Irish Mining and Exploration Group  
Irish National Organisation of the Unemployed  
Irish Pharmaceutical Healthcare Association  
Irish Small and Medium Enterprises Association  
Irish Software Association  
Irish Tourist Industry Confederation  
Irish Venture Capital Association  
Kelly, Grellan  
Kerry Innovation Centre  
Louth County Development Board  
Maguire, Andy  
Marketing Institute

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Meath County Council  
Murphy, Dermot  
National Centre for Partnership and Performance  
National Competitiveness Council  
National Institute of Transport and Logistics  
National Qualifications Authority of Ireland  
National Standards Authority of Ireland  
National University of Ireland, Centre for Innovation and Structural Change  
Novara I.T.  
Oak Tree Press  
Oracle Corporation Ireland Limited  
PLATO Ireland  
Print Industry Training and Development Forum  
Science Foundation Ireland  
Shannon Development  
Sherlock, Malachy  
Skillnets  
Small Firms Association  
South East Regional Authority  
South Tipperary County Council  
Sure Engineering (Europe) Limited  
Telecommunications and Internet Federation  
Tourism Policy Review Group  
Údarás na Gaeltachta  
University of Dublin, Trinity College, School of Business Studies  
University of Limerick, Programme for University Industry Interface  
Western Development Commission  
Young Entrepreneurs Scheme National Committee

# E Developing the Agri-food Sector

## Developing the Agri-food Sector: An example

*Unlike other sectors of the Irish economy, the agri-food industry is multi-faceted, with a large number of growers/producers at farm level complemented by primary processor and added-value processing industries. Food security and food safety issues are paramount, which, coupled with the multi-national trade profile of the industry, make it a heavily regulated sector.*

### 2004: The Starting Point

*Today, Ireland is internationally recognised as a leading food producing country – benefiting from its ‘green’ image and relatively unspoiled environment. Ireland is generally perceived as a source of high-quality base ingredients with the potential to increase output of added-value and speciality food and beverage products. Key companies in the industry have out-performed other indigenous sectors in developing the capabilities and scale required to compete and grow in world markets. A number of indigenous enterprises have established leading positions in niche or specialist markets globally. Importantly, given the sector’s regional spread, it plays a significant role in the spatial distribution of development and employment across the country.*

*The Irish agri-food and drink sector now faces fundamental change, largely driven by CAP reform and WTO negotiations. Rapid consolidation at retail and production levels, trade liberalisation and increased competition from lower cost regions, represent major challenges to this important sector of the Irish economy.*

*Ireland’s future competitiveness as a food exporter will depend on efficiencies across the entire supply chain, from primary input production to manufacturing, marketing and distribution. Product differentiation and the capability to satisfy evolving consumer requirements will be essential.*

*A number of strategies have been proposed in recent years for the development of the agri-food sector.<sup>130</sup> If some of the key initiatives were implemented, Ireland could become world renowned for the highest quality and standards in production, processing, and customer services in specific segments of the industry.*

### The Agri-food sector in 2015

*If appropriate policy initiatives are taken, by 2015 Ireland will be internationally recognised as an important location for the production of high value-added foods products such as:*

- » Prepared consumer foods
- » Functional foods and beverages
- » Food ingredients
- » Speciality foods

<sup>130</sup> Previous reports published include: Department of Agriculture, Food and Rural Development, *AgriFood 2010, A Plan of Action, 2000*; Promar International, *Strategic Plan for the Irish Dairy Processing Sector, 2003*; McKinsey and Co., *Preparing the Irish Beef Sector for the 21st Century, 1998*; Prepared Consumer Foods Group, *Prepared Consumer Foods Strategy 2003-2006*.

*Developments in the industry will include some or all of the following:*

- » Consolidation and growth in the industry will lead to a greater number of significant companies, capable of addressing European markets*
- » Active collaboration between enterprise and academia, both nationally and internationally, in applied research and innovation will facilitate knowledge transfer and commercialisation. The focus of research effort will be on areas where Ireland has existing expertise or natural advantages and on specific growth opportunities*
- » Increases in productivity and efficiencies will be realised across the entire supply chain, in processing, delivery mechanisms, and customer service*
- » The sector will be recognised as offering attractive career prospects, and will attract the highest calibre of management and staff capability.*

*Ireland's success in the agri-food sector will be reinforced by initiatives such as the following:*

*Cohesive Agri-food Strategy: The activities of existing agencies charged with the development of the food industry will be consolidated into a single food industry development agency. This agency will be responsible for the development of an over-arching strategy, combining inputs from enterprise and academia. The strategy will be focused on developing industry strengths and effective innovation and will encompass clear objectives and aggressive national targets for high standards.*

*The agency will foster rich interaction between the key players in relation to research and product development, primary production, processing, marketing and distribution. It will seek to gather and disseminate market research, to develop technology roadmaps specific to the industry, to market Ireland's 'brand' for agri-food internationally, and to actively engage in the formulation of effective food safety policy.*

**Marketing:** *A comprehensive marketing programme will be developed between Irish companies and international customers, extending Ireland's reach beyond the UK to European markets. Ireland's industry will be increasingly customer-orientated, and continue to adapt products to meet changing customer needs. The industry will develop 'Food Ireland', a strong brand for its high-quality food sector that is internationally recognised and renowned.*

**Research and Development:** *Increased collaboration between research institutes and enterprise, both at national and international levels, will be actively fostered to drive market-led R&D. Ireland's research base will reach critical mass. Research will be carried out in a number of world-class research institutes and there will be active collaboration and complementarity in research agendas. Ireland's intellectual property framework will facilitate access to research and its subsequent commercialisation.*

*The application of non-technological innovation will result in significant efficiencies in processing, delivery mechanisms, logistics and customer service, and an increased awareness and strategic use of design (packaging, branding and product development).*

**Regulatory Environment:** *Competition law will be clarified in recognition of the need for scale in order to compete effectively at international level (as with models in the UK, Denmark and the Netherlands). Ireland's agri-food enterprise base will consolidate effectively as a result, and will benefit significantly in growth of export sales.*

**Education:** *The education system for the agriculture and food sectors will be re-vamped following consultation with enterprise, and courses will include modules on sales and marketing, strategic and business planning, commercialisation of R&D, and product and process development.*

# F Glossary

<b>ABT</b>	<b>An Bord Tráchtála-The Irish Trade Board</b> <i>ABT was merged into the newly established Enterprise Ireland in 1998.</i>
<b>ADSL</b>	<b>Asymmetric Digital Subscriber Line</b> <i>A communications technology which allows an ordinary telephone to be used for high speed broadband communications.</i>
<b>APSS</b>	<b>Approved Profit Sharing Schemes</b> <i>These schemes enable employees to convert taxable cash bonuses into tax free shares in their employing company or parent company</i>
<b>ASOS</b>	<b>Approved Share Option Schemes</b> <i>These schemes offer tax relief on share options: an employee may be given shares in his/her employing company worth up to €1,270 per annum without being liable for income tax.</i>
<b>B2C</b>	<b>Business to Consumer</b> <i>Any business or organisation that sells its products or services to consumers for their own use.</i>
<b>BERD</b>	<b>Business Expenditure on Research and Development</b>
<b>BMW Region</b>	<b>The Border, Midland and Western Region</b> <i>The region consists of 13 counties; Cavan, Monaghan and Donegal; Galway, Leitrim, Roscommon, Sligo and Mayo; Laois, Longford, Louth, Offaly and Westmeath.</i>
<b>Bord Bia</b>	<b>The Irish food and drink industry's trade development and promotion organisation</b>
<b>BPO</b>	<b>Business Process Outsourcing</b> <i>The practice by which firms turn over their back-office functions, such as human resources, accounting and administration, to outside vendors. Advances in communications technology mean that the geographic relocation of such tasks can be local, national or international.</i>
<b>CAP</b>	<b>Common Agricultural Policy</b> <i>CAP was adopted by the European Economic Community in the 1960s in an attempt to increase food security and stabilise food prices in its member states. It provides price supports to, and promotes technical progress amongst, EU farmers.</i>
<b>CEBs</b>	<b>City and County Enterprise Boards</b> <i>There are 35 city or county enterprise boards, co-ordinated by the Department of Enterprise, Trade and Employment. Their role is to promote the development of micro-enterprises (10 employees or less) at local level.</i>

<b>Clusters</b>	<i>A geographically proximate group of companies and associated institutions in a particular field, linked by commonalities and complementarities. (Michael E. Porter)</i>
<b>Culliton Report</b>	<i>A Time for Change: Industrial Policy in the 1990s. A Government-commissioned review of industrial policy conducted in 1992.</i>
<b>DSL</b>	<b>Digital Subscriber Line</b> <i>A family of similar technologies which allow ordinary telephone lines to be used for high speed broadband communications. The family includes ADSL, HDSL, VDSL etc.</i>
<b>EFP</b>	<b>Employee Financial Participation</b> <i>Schemes which encourage greater employee involvement in the enterprise in which they work through gain-sharing and profit-sharing.</i>
<b>EGFSN</b>	<b>Expert Group on Future Skills Needs</b> <i>Established by the Government in 1997 to develop national strategies to tackle the issues of skill needs, manpower needs estimation, and education and training for business.</i>
<b>EMEA</b>	<b>Europe, Middle East and Africa</b>
<b>EMTR</b>	<b>Effective Marginal Tax Rate</b> <i>The rate at which each additional euro is taxed when allowance for the initial tax threshold is made.</i>
<b>EMU</b>	<b>European Monetary Union</b> <i>Currency union between 12 EU member states, commonly called the Euro Zone. Since January 1st 2002, euro notes and coins have been in general circulation, replacing national currencies. Monetary policy in the Euro Zone is set by the European Central Bank rather than the central bank in individual member states. Each member state in the Euro Zone is represented on the General Council of the European Central Bank.</i>
<b>Enterprise Ireland</b>	<i>State agency with primary responsibility for the development of Irish-owned business in manufacturing and internationally-traded services.</i>
<b>Eolas</b>	<b>The Irish Science and Technology Agency</b> <i>Eolas' functions were merged in 1994 into the institutional arrangement which evolved into Enterprise Ireland.</i>
<b>ESOPs</b>	<b>Employee Share Ownership Plans</b> <i>Tax effective mechanisms through which employees can acquire shares in their company.</i>
<b>ESRI</b>	<b>Economic and Social Research Institute</b> <i>Ireland's national independent think-tank undertaking economic and social research, with the aim of informing policy formation and societal understanding.</i>
<b>Fáilte Ireland</b>	<i>The national Tourism Development Authority, established in 2003. It provides strategic and practical support to develop and sustain Ireland as a high quality and competitive tourism destination, working in partnership with the tourism industry.</i>
<b>FÁS</b>	<b>Foras Áiseanna Saothair</b> <i>The Training and Employment authority established in 1998 responsible for increasing the employability, skills and mobility of jobseekers and employees to meet labour market needs.</i>

<b>FDI</b>	<b>Foreign Direct Investment</b>
<b>FETAC</b>	<b>Further Education and Training Awards Council</b> <i>The national awarding body for all further education and training in Ireland.</i>
<b>FOI</b>	<b>Freedom of Information</b>
<b>Forfás</b>	<i>State agency responsible for providing policy advice on enterprise, trade, science, technology and innovation and for advising and co-ordinating IDA Ireland, Enterprise Ireland and Science Foundation Ireland in relation to their functions.</i>
<b>FTSE 100</b>	<b>The Financial Times Stock Exchange 100 stock index</b> <i>A share index of the 100 largest companies on the London Stock Exchange, by market capitalisation.</i>
<b>GDP</b>	<b>Gross Domestic Product</b> <i>The total value of all goods and services produced in an economy in a given time period.</i>
<b>GERD</b>	<b>Gross Expenditure on Research and Development</b> <i>This includes both public and private investment in R&amp;D</i>
<b>Globalisation</b>	<i>Globalisation is the process of integration of economies and societies around the world.</i>
<b>GNP</b>	<b>Gross National Product</b> <i>The total value of all goods and services produced in a country's economy in a given time period accruing to the residents of that country.</i>
<b>HEA</b>	<b>Higher Education Authority</b> <i>The statutory body responsible for the funding of universities and designated third-level education institutions. Its functions include the development of third-level education to meet the needs of the community and to perform an advisory role in relation to all higher-level education.</i>
<b>HEAnet</b>	<i>Ireland's National Education and Research Network, providing Internet services to students and staff in Irish Universities, Institutes of Technology and other educational and research organisations. It provides direct connectivity for its community to other networks in Ireland, Europe, the USA and the rest of the world.</i>
<b>HETAC</b>	<b>Higher Education and Training Awards Council</b> <i>The qualifications awarding body for third level education and training institutions outside the university sector.</i>
<b>IBEC</b>	<b>Irish Businesses and Employers Confederation</b> <i>IBEC represents and provides economic, sectoral, regional, commercial, employee relations, social affairs and information services to companies and organisations from all sectors of economic and commercial activity.</i>
<b>ICSTI</b>	<b>Irish Council for Science, Technology and Innovation</b> <i>Established in 1997 to advise the Government on all aspects relating to the strategic direction of science, technology and innovation policy.</i>
<b>ICT</b>	<b>Information and Communications Technology</b>
<b>IDA Ireland</b>	<i>The state agency responsible for attracting inward investment in manufacturing and internationally-traded services sectors.</i>

<b>InterTradelreland</b>	<i>Established under the 1998 Belfast Agreement, InterTradelreland is responsible for exchanging information and co-ordinating work on supporting trade, business and related matters in a cross broader context.</i>
<b>IP</b>	<b>Intellectual Property</b> <i>The asset which arises where innovation or creative activities lead to an invention, design or process sufficiently unique or original to be considered confidential or valuable or both.</i>
<b>IRCSET</b>	<b>Irish Research Council for Science, Engineering and Technology</b> <i>Established in 2001 to promote excellence in research across the sciences, engineering and technology.</i>
<b>Linkages</b>	<i>Systems of networked links and collaboration between firms in key sectors, between Irish and foreign companies, and between enterprise and academia.</i>
<b>Mass Customisation</b>	<i>The process by which mass-market goods and services are individualised to specific customer needs.</i>
<b>NALC</b>	<b>National Adult Learning Council</b> <i>Established in April 2002 to promote the development of adult learning, to ensure a co-ordinated strategy across the different sectors and agencies involved in adult learning, to support quality, engage in research and promote international co-operation.</i>
<b>NCC</b>	<b>National Competitiveness Council</b> <i>Established in 1997 as part of the Partnership 2000 Agreement. The NCC provides regular reports to the Taoiseach on key competitiveness issues for the Irish economy together with recommendations on policy actions required to enhance Ireland's competitive position.</i>
<b>NCCA</b>	<b>National Council for Curriculum and Assessment</b> <i>The statutory body that advises the Minister for Education and Science on matters relating to the curriculum for early childhood education, primary and post-primary schools, assessment procedures employed in schools and examinations on subjects which are part of the curriculum.</i>
<b>NCPP</b>	<b>National Centre for Partnership and Performance</b> <i>Established by the Government in 2001 to support and drive change in the Irish workplace. The Centre's remit is to enable organisations in the private and public sectors, through partnership, to respond to change, to build capability and to improve performance.</i>
<b>NDP</b>	<b>National Development Plan</b> <i>The NDP involves an investment of over €52 billion of public, private and EU funds (in 1999 prices) over the period 2000-2006 in health services, social housing, education, roads, public transport, rural development, industry, water and waste services in Ireland.</i>
<b>Networks</b>	<i>Groups of firms and other organisations that are organised, formally or informally, around common interests. The firms may share interests in, for example, technology, standards or regulations; they may co-operate to commission research, to articulate skills requirements or to purchase equipment; they may share information on markets or they may form a consortium to address a customer need that none of them could address on their own.</i>

<p><b>NQAI</b></p>	<p><b>National Qualifications Authority of Ireland</b>  <i>Established in 2001, the NQAI's role is to develop and maintain a framework of qualifications to facilitate learners in accessing programmes of education and training and in transferring and progressing from them.</i></p>
<p><b>NSS</b></p>	<p><b>National Spatial Strategy</b>  <i>A twenty-year national planning framework, launched in 2001, designed to deliver more balanced social, economic and physical development between regions. A commitment to prepare a spatial strategy to plan at national level for the country's future spatial development was included as part of the National Development Plan 2000-2006.</i></p>
<p><b>NSS Gateways</b></p>	<p><b>National Spatial Strategy Gateways</b>  <i>Named as Dublin, Cork, Limerick/Shannon, Galway, Waterford, Dundalk, and Sligo. Gateways have a strategic location nationally and relative to their surrounding areas, provide national scale, social, economic infrastructure and support services.</i></p> <p><i>In addition to the Gateways named above, Letterkenny/Derry, and Athlone/Tullamore/Mullingar, act as linked gateways working together to promote regional development in their respective areas.</i></p>
<p><b>NSS Hubs</b></p>	<p><b>National Spatial Strategy Hubs</b>  <i>Hubs support the role of the Gateways and in turn energise smaller towns and rural areas within their sphere of influence. The NSS Hubs are named as Cavan, Ennis, Kilkenny, Mallow, Monaghan, Tuam, Wexford. In addition Ballina/Castlebar and Tralee/Killarney act as linked hubs working together to promote regional development in their respective areas.</i></p>
<p><b>OECD</b></p>	<p><b>Organisation for Economic Cooperation and Development</b>  <i>A global body dedicated to the promotion of democratic government and the market economy. It has 30 member states and active relationships with some 70 other countries, NGOs and civil society. Best known for its publications and statistics, its work covers economic and social issues from macroeconomics to trade, education, development, and science and innovation.</i></p>
<p><b>PRTL</b></p>	<p><b>Programme for Research in Third Level Institutions</b>  <i>An initiative to boost research capabilities in the higher education sector, PRTL supports research in humanities, science, technology and the social sciences.</i></p>
<p><b>RIA</b></p>	<p><b>Regulatory Impact Analysis</b>  <i>An assessment of the expected consequences of any proposed new regulation or regulatory change. It involves a detailed analysis to ascertain whether or not the new regulation would have the desired impact and also helps to identify the consequences of any hidden costs associated with regulation.</i></p>
<p><b>SAYE</b></p>	<p><b>Save As You Earn</b>  <i>A tax efficient means of saving. Under this scheme, employees agree to save for a fixed time period and are given the option to buy shares in their company at a predetermined price that may be at a discount of up to 25% of the market value at the time.</i></p>

<b>SFI</b>	<b>Science Foundation Ireland</b> <i>Established in July 2003 by the Government to invest €646 million between 2000 and 2006 in academic researchers and research teams who are most likely to generate new knowledge, leading-edge technologies and competitive enterprises in the fields underpinning biotechnology and information and communications technology. SFI is becoming increasingly responsible for various state investments in basic research.</i>
<b>Shannon Development</b>	<i>Established in 1959 to generate industry, tourism and regional development in the wider Shannon area.</i>
<b>Skillnets</b>	<i>Established in 1999 to encourage and support groups of enterprises to formulate strategic answers to their joint training needs. This process is facilitated through the establishment of networks where companies and organisations work together to decide on their training requirements and delivery. Skillnets is funded under the National Training Fund by the Department of Enterprise, Trade and Employment.</i>
<b>SSC</b>	<b>Shared Services Centres</b> <i>Central locations to which multinational companies relocate certain functions, such as payroll, purchasing and accounts payable, in order to reduce costs and improve efficiency.</i>
<b>State Aid</b>	<i>Any aid granted through state resources in any form whatsoever which favours certain undertakings or the production of certain goods.</i>
<b>Task Force on Physical Sciences</b>	<i>Established in 2000 to tackle growing concerns about declining numbers of students opting to study the physical sciences in Irish schools, universities and colleges.</i>
<b>Teagasc</b>	<i>Teagasc provides integrated research, advisory and training services for the agriculture and food industry and for rural communities in Ireland.</i>
<b>Technology Platforms</b>	<i>A group of technologies that draw on more basic areas of knowledge (such as mathematics, physics and computing), and which can be applied to the development of a wide range of products and services.</i>
<b>Telesis Report</b>	<i>A Review of Industrial Policy: A Report by Telesis Consultancy Group. A Government-commissioned review of industrial policy conducted in 1982 by the Telesis Consultancy Group.</i>
<b>Údarás na Gaeltachta</b>	<i>Regional development agency with responsibility for the economic, social and cultural development of the Gaeltacht regions and ensuring the continuation of the Irish language as the spoken language of the community in these regions.</i>
<b>VC</b>	<b>Venture Capital</b> <i>Capital provided by full-time, professional firms (venture capitalists) or private persons who invest with management in ambitious, fast-growing companies which have the potential to develop into significant businesses.</i>
<b>VECs</b>	<b>Vocational Education Committees</b> <i>VECs provide and manage vocational schools and community colleges, employ administrative and teaching staff, and provide vocational and continuation education for their administrative areas. There are 33 VECs operating in respective county council areas.</i>

<b>WCM</b>	<b>World Class Manufacturing</b> <i>A set of concepts, principles, policies and techniques for managing and operating a manufacturing company. It primarily focuses on continual improvement in quality, cost, lead time, flexibility and customer service as the companies concerned aim to become best in class in each area.</i>
<b>WTO</b>	<b>World Trade Organisation</b> <i>Established 1995 (formerly General Agreement on Tariffs and Trade – GATT), and with a membership of 147 countries, the WTO is the international body which deals with the rules of trade between nations.</i>

