

ANNEX IV

**REPORT PREPARED BY THE IRISH MANAGEMENT
INSTITUTE ON ECONOMIC WORKING GROUP
DISCUSSIONS, 18 SEPTEMBER 2009**



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2 Introduction

The Irish Management Institute was retained by the Department of Foreign Affairs to facilitate at the Working Group sessions during the Global Irish Economic Forum at Farmleigh House on September 18th and 19th 2009. In addition the Institute was asked to provide a feedback report to the Department. This document contains that report.

Section 3 explains the approach taken to the design of the facilitation and the compilation of the report. We also identify a number of summary observations on the output of the working groups.

Section 4 contains the output of the working groups. Initially the summary set of comments and recommendations agreed by the group in answer to the questions posed are noted. These recommendations were produced in the Summary Report distributed to delegates on the second day of the Forum. Following the summary recommendations the detailed discussion at the group has been recorded.

3 Designing a Facilitation Process to engage with the Diaspora

The brief for the Irish Management Institute was: to facilitate the 11 working groups on the first day of the Forum, to provide a summary report to delegates on the second day, and to compile a final report for the Department of Foreign Affairs. In addition the Institute was asked to present the findings from the summary report to the morning plenary session on the second day of the Forum.

In fulfilling this assignment the Institute sought to:

- provide an open and confidential space for discussion for idea generation;
- capture the essential contributions and identify the actionable recommendations;
- provide a means for the Department of Foreign Affairs and Government to capitalize upon the outputs of the working groups.

With this in mind IMI designed the facilitation process as which would deliver key recommendations from each group as well as the broader discussion points on each topic noted by the group participants.

A number of key themes emerged from the discussions at all 11 working groups held on the first day of the Forum. These are summarised below.

Building a Diaspora Network

The delegates felt strongly that the Forum itself and building greater strategic links with the leading business members of our Diaspora was important and that it was possible to build a diaspora network as a resource whose experience and knowledge could be tapped for the benefit of the economy. It was noted that access to this network would need to be monitored to maintain its value.

Branding Ireland

The delegates felt strongly about the need to bring greater focus and clarity to Ireland's brand abroad. This would involve building upon existing elements of our brand such as our cultural heritage and image as a green island and correcting potentially negative images of Ireland by updating our image with other

capabilities such as our success in fields such as immunology and the reputation of our non-governmental organisations.

The need for Strategic Focus on Specific Markets

Many of the groups highlighted the need to select and target specific markets and to align our skills base and investment in research and development to these markets. Those ambitions cited most frequently were Ireland's becoming a prime location for Intellectual Property protection, a test-bed for clinical trials and a leader in food and green energy innovation.

Providing a Single Interface to Stakeholders

A commonly cited issue was the need for coordination across many bodies to provide a single point of access for those doing business in Ireland. The solutions suggested for this challenge were varied and ranged from the appointment of a single person, or Tsar, to lead a group of disparate entities, to innovations in the process by which the entities collaborated to engage with external stakeholders.

The Importance of Focused Engagement with Asia

Participants from various sectors underlined the need to be more visible and active in Asia, building on the work of the existing Asia Strategy. Participants felt strongly that beyond certain cultural brands, particularly Riverdance and U2, there was little awareness or sense of Ireland in Asia, an area of massive growth and potential markets.

4 Output of the Working Groups

The following shows the fully documented discussions which took place in each of the groups. As discussions at the Forum took place under Chatham House rules, comments and suggestions are reported but not attributed to particular individuals

4.1 Group 1: How does Ireland attract higher value inward investment (e.g. more R&D) and secure existing investments?

Key recommendations

- **Promote** Ireland's **unsung capabilities**. For example Ireland is home to a research excellence in immunology where we are ranked second in the world, but this may not be well known.
- Create and present a **consistent credible image** - to attract scientists, business as well as tourists.
- Map and identify **emerging industrial trends** and technologies (not just basic science) and target applied research in these areas.
- Develop a **thematic focus** - one stop shop for common departments, universities and agencies which represent Ireland to investors. Too many vertical silos make communications and implementation difficult.
- Consider the appointment of an **implementation body** or Tsar, as there is an urgent need for capacity/systems to ensure implementation follows decisions.
- Continued **development of 3rd and 4th level education** with more consistent long-term funding focused on world class performance and collaboration.
- Recognition of the **broader education needs** for those who will play important roles, not just in basic science, but also business, and applied research areas.
- Review the **IP regime** in universities as it is not business friendly; reconsider the recommendation of the commission on taxation to remove patent tax relief.

Full Discussion

Action Area	Comment
Branding Ireland	The profile of R&D in Ireland needs to be readdressed
Branding Ireland	Ministers should be key in attracting investment

Action Area	Comment
Strategic Focus	There are too many mediocre universities - no world class university. We are churning out graduates and not focusing on 4th level.
Branding Ireland	We need the IDA - they are sensational. We need Enterprise Ireland for Irish companies. We now need the DFA as an enterprise agency. Closing embassies is wrong especially in emerging markets.
Strategic Focus	Ireland must educate various customers around the world e.g. we are now two in world in immunology - How many know that? We must integrate resources at 4th level
Branding Ireland	We do not use cultural exports enough. Culture is seen by business as a soft asset - but in Ireland culture is a very hard asset .
Branding Ireland	U2 have promoted a fantastic brand for Ireland, not only in the area of music.
Branding Ireland	We have to sell to tourists on value, not cost
Single Interface	The IDA is definitely stronger than it was 2 years ago. R&D, tax, and legal environment are fundamental to attract industry.
Competitive Environment	High cost is a reality.
Skills & Education	Education is key to research ability.
Skills & Education	We must focus on more than PhDs. Educational capabilities need to be catered for to contribute to economy. We must increase people's capacity to run businesses.
Skills & Education	The Saudi students we sponsor are first class with three languages - to be competitive Ireland needs to build up the competency of its students.
Skills & Education	R&D is good but there is an over concentration. There are a huge number of people that work outside of research.
Strategic Focus	We should exploit the finance and legal competencies which we have developed over the years to make new offerings.
Skills & Education	Export talent early and bring back experience. We should also export PhDs by placing them in corporations around the world to bring back experience
Single Interface	There should be a Tsar to drive the jobs agenda.
Skills & Development	In order to develop indigenous capability we should use Irish researchers. We need to recycle the aircraft industry. We should create a reverse supply chain and develop the capability in the country. For example the Irish Satellite Programme.
Single Interface	Make use of underutilised airports.
Structure	A Great Leap forward plan is needed. The diaspora have the experience to know what we need to do. We could write it down but it has to happen. The ideas must be harnessed and executed.

Action Area	Comment
Competitive Environment	We must look at Ireland as a company. How do we make sure ideas are picked up and collected and developed? We need <ol style="list-style-type: none"> 1. An observatory - looking worldwide to see what's coming 2. Need to institutionalise strategy for implementation
Strategic Focus	IP environment is not attractive for multi nationals. Requires a better tax regime. Review recommendation of commission of taxation to remove patent income relief.
Single Interface	Do we need three separate agencies research for FDI,R&D, export? We need relationship Mangers to unite them.
Single Interface	We are supposed to be a green energy economy however ESB is owned by the state.
Single Interface	We tend to be very poor at bringing together different strands in our vertical systems and require integrated structures.
Single Interface	Grant applications for things like cancer research are lost as the universities do not have the ability to get together. A little competition is good but collaboration is needed.
Strategic Focus	Need to identify the high value industry on which we should focus for the next 10-15 years. We must cluster and get critical mass in key industries. There is convergence in life sciences e.g. Independent living research institute
Strategic Focus	We have succeeded in some areas. 15-20 years ago we were not higher value. Google chose Ireland over anywhere else in Europe to put 1600 people.
Strategic Focus	Research in Ireland is relatively new but we have good researchers across many disciplines - this is a good skill - the Irish research system is adaptable.
Single Interface	IDA is one of the best agencies.
Skills & Education	We can't all be PhDs. We <i>can</i> manufacture here. We can be anything. We have an advantage as a country to be able to get key decision makers together. See the Five counties scholarships - shortlist - 176 applications - all great - this is very impressive – these students not only have high points but had passion for the subject also. They had broad talent.
Skills & Education	It is not just about those that can achieve high points in the Leaving Certificate but also those who show interest in a particular area and demonstrate they can get on in life. In the U.S. there is a Scholar's event where 250 kids get recognised - 3-4 day event - doing for 15-20 years - introduced by kids who have got scholarships in the past - community - they connect together, look at their CVs and think about science
Skills & Education	I started in business 36 years ago - at the time everybody said we couldn't do it. We had no support structure in the country at that time - no advice etc and we had to go to London for assistance. All this is now in available Ireland - we have the skills and expertise here. Industry has been very successful in creating jobs - 2.2 m employed in country. The Government should bring experts (who have created employment) in every now and then to advise and avail of their unique knowledge.
Skills & Education	There is a lot of funding available through Framework 7.

Action Area	Comment
Single Interface	Very few Irish in Asia - all made it themselves many Asian especially Chinese - looking to west. Singapore is a small open economy like Ireland. Singapore has a joint model with China. We should use this example to bring the Chinese to Ireland.
Engaging the Diaspora	In the 1980s many emigrated. We now have a different type of diaspora who do not want the clichéd image of Ireland. A certain cohort of the diaspora is needed for a diaspora network to work well. We also need to improve skill at all levels.

4.2 Group 2: How can we help indigenous exporting Irish companies achieve scale?

Key recommendations

- Collaborate to create an **international business network** of Irish diaspora. It would be most important that the Irish companies are screened before access is given to the network. Diaspora should commit a day a month. Showcase this in a pilot as initial step. Provide a **database of skills, regions, contacts, and sessions** organised on sustainable basis underpinned by State resources. Identify **10-20 best Irish companies** (with worldwide solutions) in conjunction with Enterprise Ireland – with the potential to scale and change targets accordingly.
- **Proper funding** is essential – piecemeal funding is a danger
- Develop a **revised Strategy for Asia** – Irish penetration of this powerhouse centre is poor and needs time, energy, wisdom & patience.
- Establish an **innovation centre in Silicon Valley**. Surround the companies with experts and showcase companies to the market they are selling to.
- Ensure embassies have a **strong business focus**. Increase the footprint of official representation in North America.

Full Discussion

Action Area	Comment
Engaging the Diaspora	Specific call to action to the diaspora was recommended. Question of resourcing and sustainability of any diaspora network needs to be considered. Specific participants in the group volunteered to collaborate on a proposal to create an international business network of Irish diaspora. Most important that the Irish companies are screened before access to the network.
Engaging the Diaspora	Diaspora is willing to connect but companies must follow through ("deep closet paddies are around")
Engaging the Diaspora	Diaspora should provide access to strategic customers.
Engaging the Diaspora	Entrepreneurs make mistakes and can learn from the diaspora. Some resources which could be put in place for this are free mentoring (globally) e.g. organised resources and databases.
Engaging the Diaspora	Focus on 'winning' companies. Screening of companies important with this. Enterprise Ireland needs more resourcing. How many people can you help? Diaspora should commit a day a month. Showcase this in a pilot. Needs to be the 'right' company with right attitude
Strategic Focus	Back the company/person rather than the sector. Ireland misses new opportunities by having too many specific targets such as Pharma and IT.

Action Area	Comment
Strategic Focus	There are 20-30 companies in Ireland ready for transition – Enterprise Ireland need flexible policy to support these. See for example the model of Mittlestad in Germany
Strategic Focus	Companies need the ambition to be global from outset. Change benchmarks of EI e.g. get 20 IPOs on the NASDAQ.
Strategic Focus	Changing Worlds - use as a case study.
Strategic Focus	Make focused bets and Identify 10-20 best companies (with world wide solutions). Use the diaspora with EI to focus companies.
Funding	Companies need mentorship with funding to provide value added funding.
Funding	See the example of factories in Saudi Arabia built with funding from Danes. We should develop partnerships to fund exports.
Funding	The Irish are natural entrepreneurs but are constrained by funding structure which targets certain sectors only.
Funding	Venture capital is drip fed; no medium term is secured.
Funding	Don't reduce VC funding in the current climate as there is already insufficient venture capital in Ireland
Funding	Attract private equity from outside
Funding	The logistics of funding are distracting (and SMEs are not experts)
Funding	Bank money is preferable to VC but there is lack of sector specialists in banks.
Strategic Focus	We need to broaden our export market as we are too dependent on UK.
Strategic Focus	Strategy for Asia- powerhouse centre and Irish penetration is poor, need time energy, wisdom, patience.
Strategic Focus	Develop an EU domestic market to avoid the difficulties of the small domestic market.
Skills & Education	Need enhancement of management capability. Import management experts. Provide access to CEOs of SMEs to management knowledge here or abroad.
Skills & Education	EI had a bespoke Stanford programme for the management team of companies.
Skills & Education	Need to use a single provider for management capability. Too many providers have been used in the past.
Skills & Education	Go to the best and get the best knowledge. The networking aspect of Stanford has been an advantage in the past.
Skills & Education	Train companies to develop their “elevator pitch” i.e. to pitch beyond the business plan.
Skills & Education	There are few companies which scale above 30m. We need to work on capabilities and confidence to engage in acquisitions.
Skills & Education	Look at selling and marketing as well as innovation.
Single Interface	We need collaboration between the representative entities abroad.
Strategic Focus	Relocate London organisations to the Far East.
Single Interface	Irish representatives in countries surpass others.
Single Interface	Culture and mindset brings more joined up thinking - culture of collaboration in more distant places.
Branding Ireland	The ambassador needs to be a leader.

Action Area	Comment
Branding Ireland	Looking at new model for ambassadors- e.g. Asia very business focused ambassadors. 21 diplomats in US. Is Irish footprint strong enough?
Branding Ireland	Train ambassadors to be commercial. An invitation from an ambassador has power and is a great tool if used effectively.
Single Interface	Use appropriate representatives for certain countries e.g. Russians have great respect for Mayors.
Single Interface	Don't focus on one agency. Enterprise Ireland is not the only answer for companies
Strategic Focus	Put innovation centre in Silicon Valley- surround companies with experts and showcase Irish companies to market they are selling to. Irish technology leadership group - needs partnership and commitment (not just from government).
Branding Ireland	Need to market Europe not individual countries. So that it is Europe which is competing with Asia and U.S. In Buenos Aires there are 24/25 EU states represented by different flags.

4.3 Group 3: How do we create a European Silicon Valley in Ireland i.e. attracting talent, entrepreneurs, IP etc?

Key recommendations

- The group recommend a merging of Technology and the Arts i.e the creation of **an educational hub** for the merging of technology and the cultural arts. The group gave the specific example of the Carnegie/Mellon Masters in Entertainment Technology which is a joint offering from the School of Fine Arts and School of Technology).
- To make Ireland the go-to-place for expertise in **Intellectual Property** protection and patent by improving the process to make it more user friendly and efficient and more advantageous from a tax point of view.
- Pick **world class departments** rather than worrying about bringing a whole university to a world class level, build critical mass in selected areas across universities.
- We need to cultivate a culture of understanding how to access **venture capital**.
- Biggest problem is not technical, it's **management** - Irish ventures should be encouraged more to draw on the managerial experience from the Diaspora (sit on the boards of companies).
- Use the **purchasing power of the Irish Healthcare System** as a stimulus to drive innovation in Healthcare - particularly healthcare for the elderly.

Full Discussion

Action Area	Comment
Skills & Education	Merge Technology and the Arts Suggested model Carnegie/Mellon (look at their Masters in Entertainment Technology which is a joint offering from the School of Fine Arts and School of Technology.) Another Model Stratford in Canada, they have expertise in the use of technology in the production of the arts e.g. lighting, special effects etc. Draw on insights from the research and experience with Economic Clusters.
Strategic Focus	Make Ireland the go-to-place for expertise in Intellectual Property protection and patent by improving the process to make more user friendly and efficient, more advantageous from a tax point of view.
Strategic Focus	Pick world class departments rather than worrying about bringing a whole university to a world class level, build critical mass in selected areas across universities, pick those areas
Skills & Education	We need to cultivate a culture of understanding of how to access venture capital. Unlike Silicon Valley start-ups, Irish entrepreneurs too often chose to retain control rather than accelerate the growth of the business through taking on extra equity. (50% of a big pie can be much more attractive than 90% of a smaller one). You need to take on capital to take you to the next stage.

Action Area	Comment
Skills & Education	Biggest problem is not technical it's management - Irish ventures should be encouraged more to draw on the managerial experience from the Diaspora (sit on the boards of companies)
Skills & Education	Create a really good Diaspora networking database.
Strategic Focus	Use the purchasing power of the Irish Healthcare System as a stimulus to drive innovation in Healthcare - particularly healthcare for the elderly.
Skills & Education	Israel is often used as a comparator model when we talk about Ireland as an "Island of innovation". But there are key differences. Israel investment in R&D is very defence-driven. Israel itself looks at Ireland and the IDA as a model to emulate.
Skills & Education	Patriotism is Israel's advantage, but they are impressed with our Enterprise Ireland set up.
Strategic Focus	Is Silicon Valley the right model? Silicon Valley was a bottom-up, emergent, development, not the product of deliberate industrial policy. The 'Stanford University' phenomenon was very significant (in terms of successful spin-outs), and the Valley is right in the heart of a very large market (California – one of the most populous states in the US). The model will have to be smaller in the Irish context. We need to pick winners and focus.
Strategic Focus	Make Ireland a go to place for registering patents. Create around Ireland a centre for registration for patents and re-engineer that process to become a centre of excellence. Make Ireland a place where entrepreneurs want to start companies. Attract some headliner, e.g. a Nobel Laureate to help underpin this new smart economy.
Skills & Education	There is a managerial skills shortfall. Use the untapped resource of experts to sit on boards from the diaspora to take part in management.
Skills & Education	Build on our world class third level departments.
Skills & Education	There is a misconception by entrepreneurs that capital will dilute their company. We need to teach them how to tap into capital.
Single Interface	Enterprise Ireland and IDA not cross pollinating which would help with multinationals. The approach has to be cohesive.
Skills & Education	Innovation is needed in Engineering not in Business Schools. Engineering exam papers have been the same for the last 10 to 20 years. Universities need to be innovative and progressive; students should be driving their own agenda through the modular system with more joint-degree choices. We should be preparing the MBA student for tomorrow not what happened yesterday. 25 years ago Engineering was one of the hardest courses to get into but now it's not.
Strategic Focus	Help to sell merging of technology and the arts. We could develop focus on the industries of Lighting, Sound, 3D. With these we could attract 20,000 students. Graduate schools could tie in with tourist industry featuring things once twice a year.
Strategic Focus	We have critical mass already we have to hone it down on areas that we have a right to win e.g. entertainment.
Branding Ireland	Link up with literary icons in the U.S. who are directly linked to Ireland. We are good at using our contacts and we must exploit that advantage.
Skills & Education	We need creative innovation as well as technology.
Skills & Education	We have the people and the recognition use it. There is a whole underlay of technology e.g. the tech that was involved in the U2 360 tour.

Action Area	Comment
Skills & Education	Carnegie Mellon are creating the next generation of animators. Stratford in Canada is focused on the increasing convergence of technology and the Arts, with particular concentration on the production side (lighting, sound engineering etc.). Remember that a lot of films today are no longer shot on location – they are electronically created (and this can be done in Ireland as easily as California).
Skills & Education	Technology companies are not going to Silicon Valley anymore. We are now talking to artists.
Branding Ireland	U2 made it cool to be Irish. How much was that of U2 or the Celtic tiger - gives confidence to entrepreneurs to see that it is possible.
Strategic Focus	Merging technology and the arts is a content business. We need to find out how to leverage that content value.
Strategic Focus	It is also a service business which would provide a quicker return than technology. If you got 10,000 students they will all need rooms, food. It would leverage the tourism business, property, universities.
Skills & Education	The ambition to develop Ireland as a centre where we merge technology and the arts needs to be centred around a university. Start at the University level to flesh this study out.
Strategic Focus	Select an alternative industry for focus - e.g. make Ireland the Holy Grail for the music industry.
Strategic Focus	Protect what you have through IP and patent.
Strategic Focus	The Irish government has a big budget - use Healthcare - create something around the aging population. Healthcare is a priority in all economies.

4.4 Group 4: How can our education system address any skills deficit to prepare young people to be the thought leaders of the Smart Economy (foster creativity, innovation, lateral thinking)?

Key recommendations

- Teachers should engage in **continuous development** including teaching methods, content and delivery in particular to become familiar with today's technologies, with a view to shift from rote learning to information usage as a way to facilitate creativity.
- A **greater involvement of key stakeholders**, in particular parents, government and industry. Government and industry need to articulate an overarching vision of what the graduates will look like, while schools need to partner with parents to guide the education system.
- The examination points system should be changed, without delay, from an overemphasis on exams to a **continuous assessment/credit system**.
- Teachers and schools should be subject to **transparent performance management**. A benchmarking review should be carried out to review international best practice, discipline by discipline. Much of this information already exists at the EU level.

Full Discussion

Action Area	Comment
Skills & Education	To permit creativity to emerge, the examination system (points) should be changed, without delay, with a shift to continuous assessment/credit system. There is a need for a change in teaching methods and content to use and become familiar with today's technologies and this should be linked to performance measurements of the teachers.
Skills & Education	Teachers should be taught to use today's technology.
Skills & Education	The content of the curriculum should match today's technology.
Skills & Education	Performance measurement should be introduced for teachers.
Skills & Education	A shift from exams to continuous assessment with frequent challenges for students. Germany has good examples.
Skills & Education	Government should adopt a survey of best practices for each subject area, discipline by discipline. An example for Maths would be Finland. There is also the OECD, Programme for International Student Assessment Survey as a source of data.
Skills & Education	Government needs to articulate an image/vision that is broader than school based education that includes ethical, humanistic and language aspects.
Skills & Education	The vision of the graduate is fuelled by the governments own vision for Irelands future.

Action Area	Comment
Skills & Education	An example of what the graduate should look like is outlined by the Jefferson Science Associates, JSA. Here each graduate will exit a JSA programme with the same standards as all other JSA graduates across America. See the example of JSA - www.jsa.org
Skills & Education	A theological approach to education, including ethics, has benefits.
Skills & Education	If we can identify the characteristics of the graduate at graduation, then we can work backwards to insure the school system is working to this objective.
Skills & Education	The problem is how do we fix Irelands students slipping internationally? It is most evident around the secondary school into the third level. The Irish system is no longer delivering satisfactory results and there is need for creativity. Ireland will have to set itself the objective to have the best system.
Single Interface	New York city is attempting to adopt a new position in a changed world. New York wants to secure its future by creating and sustaining innovation by leveraging its location as a gateway and capitalising as a cosmopolitan city. New York's plan will be to favour those institutions of learning which will create and facilitate such leverage. If New York can think regionally and not as a small entity maybe Ireland can too. For lifelong learning, Ireland is a gateway nation and it is also a cosmopolitan location that can host foreign nations. Ireland is able to be a gateway like New York, maybe even to the Asian market.
Skills & Education	A redefinition/retraining of the role of the teacher and subjects, periodic retraining, and radical review for education plans.
Skills & Education	A greater transparency in the teaching model including more support from parents.
Skills & Education	Teach today's children with today's technologies. When a student leaves school for the day they have so many other mediums accessible. Involving the technology of the student will benefit their learning environment.
Skills & Education	Ireland needs to think about the role of the 'teacher' and look towards creating a partnership with greater involvement from parents who carry the same vision.
Skills & Education	If parents are willing then a school should welcome them with open arms. When parents are around a school students behave better, thus a partnership is needed for more accountability.
Skills & Education	The quality of education today is still good but not as good as it was. It was better in the 1980s. The challenge exists at the second and third levels. Education should focus on the use of information which sparks creativity, rather than retaining information (rote learning).
Skills & Education	Will teachers accept/support retraining in this use of the internet and technology in education? There is an increasing need for continuous training in a changing world. Training cannot be completed during term time. Performance information and transparency need to be provided to the user (students/parents). Flexibility in dealing with inflexible teachers. Historic human resources issues must be addressed or reformed. A need to target resources, free third level education for all should be considered.
Skills & Education	Involve industry in third level: focus on clusters/pick your winners; example is EADS (European Aeronautic Defence and Space) relationship with Enterprise Ireland/SFI.

Action Area	Comment
Skills & Education	To find Aerospace PhD's EADS target the type of people they need, for example PhDs will receive higher training/education in other countries and then return to France. We need to accept a flow of qualified people in and out of the country. We also look at what clusters we can develop, once we find the need then we spend the money.
Skills & Education	Teachers are paid well. The new primary curriculum encourages creativity. At the second level, the Junior Certificate will be reviewed. The Leaving Certificate will remain. We need to have a final exam at the end of the day. We have changed the science curriculum and adapted it to first and second level. The new maths curriculum is outstanding. We are rolling out the project maths programme in 24 schools as a pilot. In 2010 there will be a full roll out. At the moment 26% of maths teacher are not qualified, there is a real issue there. Measuring performance for teachers. What is it? The schools have a real motivation. What I can do is bring parents into a partnership with a whole school investigation and to report back with a full review of overall performance, strengths and weakness and then send in the supports as necessary. The effort and motivation is there in schools in disadvantaged areas.
Skills & Education	No parent would select a school based only on statistics. It appears as if the employees of the school system are in 'control' rather than parents. The children themselves are sacrificed, the consumer does not have a proper voice and this insulated the status quo. Schools should be worked as a package deal as in the UK.
Skills & Education	We need to engage with young people in order to design and create a system that suits their needs better.
Skills & Education	A balance needs to be found between investments in the different education levels. It is often too late to support children when they have left primary level. The other balance is between science, maths and the humanities. At present science and maths are not getting the right attention.
Skills & Education	A recommendation to look at the international baccalaureate as a model for second level.

4.5 Group 5: How can the Irish financial services sector take advantage of the finance and banking sectors of the future?

Key recommendations

- **Rebrand the IFSC** to repair damage caused by domestic banking crisis.
- **Appoint an IFSC Tsar** as the point person to rebrand and to take responsibility for development.
- Ensure **smart regulatory environment** and remain open to intelligent financial innovation.
- Develop **R&D capability in banking technology** as a core research priority.
- Actively promote Ireland as a **centre for global asset management activity**.

Full Discussion

Action Area	Comment
Branding Ireland	Rebrand the IFSC. Problem as Ireland's domestic banking system has damaged the IFSC's brand and our competitors taking advantage.
Branding Ireland	Appoint an IFSC tsar as the point person to rebrand and to take responsibility for future development of the centre.
Branding Ireland	The IFSC tsar and the Governor of the Central Bank should travel to the main financial centres to admit challenge with aim of restoring confidence in Ireland as a financial centre. Example was given of efforts of Saudi Arabia after 9/11.
Branding Ireland	Actively involve and court the Irish diaspora in advocating the cause of Ireland as an international financial centre.
Branding Ireland	A proactive marketing and communication strategy should be put in place to counter the negative comment and to present a positive image. The delegates are willing to help.
Single Interface	Greater coordination between Enterprise Ireland, diplomatic service and IDA in promoting financial services, and greater use of sector expertise.
Branding Ireland	The Irish diplomatic service should be actively involved in meeting and explaining the rebranding of the IFSC. The example was given of the Japanese diplomatic service's monthly economic briefing to global financial institutions
Single Interface	Maintain flexibility in interacting with financial institutions and remain open to intelligent innovation thereby avoiding the risk of inappropriate level of caution.
Skills & Education	Improve the level of management skills and technical knowledge within the financial regulator
	There is a problem in dealing with solvency.

Action Area	Comment
Strategic Focus	Develop R&D capability in banking technology as a core Irish Research priority.
Strategic Focus	Actively promote Ireland as a centre for global asset management activity. Underestimating the geographical location of Dublin as gateway to Europe. The delegates would need to help this initiative.
Strategic Focus	Take advantage of opportunities created by European payment system and mobile payments.
Strategic Focus	Actively use the visa system to ensure availability of required specific skills. Example given of Indian accountants moving to wide range of OECD countries but not Ireland.

4.6 Group 6: How does Ireland become a leader in technology convergence (ICT/Energy/Health etc)

Key recommendations

- Develop a **new playbook for the 21st Century**. Shape the playbook based on the talents, creativity and skills available and import talent where necessary.
- **Invest 3% of GDP in R&D**. Government and the private sector must invest in this. Create the right environment for R&D, Seed Capital, Venture Capital and Government investment.
- Prioritise becoming a **world leader in IP protection**.
- Define a narrow set of **key areas of specialisation** and focus on developing a small number of centres of excellence. For example food, pharmacological and management capability.
- Become a **test bed for clinical trials**, predicated on Ireland being one of the best and most flexible countries to do these types of trials.
- Invest in the **'Final Mile' of communications infrastructure** and also ensure that there is world class speed in terms of mobile infrastructure.

Full Discussion

Action Area	Comment
Strategic Focus	Is technology convergence the real issue?
Funding	Expand research activities out from universities - IP - seed funding, venture capital - Develop the base idea in academia then commercialise using venture capital. The foundation of research foundation needs to be a government funded activity. Basic R&D is the seed corn for the next generation but there needs to be a rapid move out of research and into commercialisation. We need to be more aggressive on the venture capital and on the government funding side.
Strategic Focus	Biopharma - example of food with pharmacological properties. This is the combination of science from two fields coming together in the pre-commercialisation phase, which is the domain of research and development.
Single Interface	Government needs to develop the relationship between business and universities. Perhaps by allowing students to take a year off to further their research. Encourage people who think differently, and don't just look at sales and profit
Strategic Focus	The return on investment on education is longer than the election cycle, we need a longer-term outlook for what is good for country.
Strategic Focus	Strategies need to transcend the political (electoral) cycle. There should be no agenda but the success of Ireland.

Action Area	Comment
Infrastructure	Communications infrastructure is mission critical not a nice to have. The lag on Broadband effects the development of the Smart Economy. We need to concentrate on the 'last mile'. This should be done in three ways 1) Facilitate the rapid upgrade of the 'last mile' - facilitate access to householders. 2) Develop the mobile spectrum and benefit from the digital dividend of mobile broadband 3) Focus on Entrepreneurship; it is not talked about, too much focus on FDI. We need to look at grass roots entrepreneurship. Look to the diaspora of 60 million to gather funding together in organised way to bring it back to Ireland. This can have patriotic and commercial appeal. Example of the Israeli Recovery Bond.
Strategic Focus	Crisis is the mother of invention. Look at what we want to achieve with convergence and be a world leader at that. What do we do well? What can we do well? What will we do well? We are going to be vastly dependent on UK for next 50 yrs not China. We already have Centres of Excellence and these should be promoted e.g. Cork leading in Immunology. Establish a brand people will want to adhere to. UCC should be a brand leader no matter what MIT do. Say what these Centres of Excellence are and if we don't have the best talents, then import the best, encourage them through tax benefits, bring the excellence and skills.
Branding Ireland	Chinese are paying US universities to invest, 29 million new jobs every year, Japan developing robots - What is USP of Ireland? No hubris when in our glory, our culture is strong and the sense of Ireland is strong. Develop centres of excellence appropriate to what we do.
Single Interface	We can use technological convergence to release resources to do other things we need to do. We need to look at how to deliver services better; we are not good on delivery side. This can liberate frontline staff and the structures behind these so that resources get to people who need them.
Strategic Focus	The question "How does Ireland become a leader in technology convergence?" is too broad. We need to focus and to be famous for something in particular. Example - look at the cost of providing health to people.
Strategic Focus	We should agree to double the spend on R&D but cut the cloth to measure (focus on medical sciences). Health services - Ireland could become the smartest, fastest place to do clinical trials. We need the diagnostic and pharmacological companies to make this happen. In Washington in the next 10 years over half the data held on computers will be health data.
Single Interface	Need to get the legislation, technology and process right.
Strategic Focus	Develop Lighthouse Projects, given the population of 4million do trials here and then roll out in other markets. Prove the point in here, use Ireland as the test bed, and then roll out. We have a good relationship with Germany use that. Procure funding using PPP but the project should be owned by Civil Servants who are given a span of authority over implementation. Develop a sense of pride in this project so we would be proud to be called on as experts.
Strategic Focus	SFI should set a trend by predicting where convergence is going to come from.
Strategic Focus	Extrapolate on what is good and build on that together, e.g. Agribusiness and Food – pro-biotics and then expand into medical field.
Strategic Focus	Don't invent the wheel - if necessary steal the wheel!
Strategic Focus	What matters is what do we want to specialise in, focus on need, and be very clear. e.g. Healthcare - why Ireland? Not for its 4.3million people but as a great test market.
Strategic Focus	R&D Investment is vital. We also need to develop the people aspect - increase creativity (humanities - interpersonal relations and fuse with emerging technology). Ireland doesn't invest enough in economic intelligence.
Strategic Focus	How do we keep foreign companies here? - By understanding their changing environment.
Funding	Banks need to provide genuine access to capital to encourage entrepreneurialism.
Strategic Focus	We are a peripheral economy on marginals. We need to look from the margins, to understand what we do well, where virtues and values are. Reinventing Ireland as an island of scientists is farcical. Ireland is small, it has to focus. Decide on a specific number of topics to focus on and align funding and government policies with these in an integrated long-term policy.

Action Area	Comment
Strategic Focus	The IFSC was not focused at the start, not until backroom operations were brought in. We learned from success.
Strategic Focus	Respond to needs - massive food crisis / water crisis / fishery crisis. We have plenty of resources and skills available in these areas. Multiply this knowledge through the Universities and maintain a constant pressure to be leading experts on GM and medical benefits of biopharma. Communicate these areas of focus to facilitate their development. We have a young highly educated people; need to do these things today. The economy is not the future, it's today.
Strategic Focus	Ireland needs a new play book for the 21st century, predicated on the resources we have and what we are good at.
Strategic Focus	We need to do the maximum to retain existing FDI.
Strategic Focus	Focus externally - benchmark R&D of 3 % - not necessarily from government.
Strategic Focus	Focus on areas such as food, fisheries, water and then maybe technology and waste management.
Strategic Focus	Innovation needed not just basic Research & Development activities, but in services also.
Strategic Focus	Focus should be on - milk, microchips and medicine.
Strategic Focus	We have an innate skill at communicating; we should develop centres of excellence in media production in Ireland. There is no reason why these cannot be based here as opposed to UK.
Branding Ireland	The Irish media are very negative about Ireland.
Single Interface	The government needs help to bring these ideas to the people; there should be a public private partnership in explaining this to the people.
Strategic Focus	Convergence will come from identifying real world needs and using technology and excellent people to solve these issues.

4.7 Group 7: How do we develop our low carbon economy?

Key Recommendations

Branding

- Branding Ireland as green should be seen as a **national agenda**. A significant and cohesive **campaign is required to establish the “Green Ireland” image at home and abroad**.
- There is already much enthusiasm within the private sector for **investment in green projects** but that procurement laws are stifling this enthusiasm.
- **Sustainability metrics to be** included in all public procurement tenders (e.g. energy conservation metrics).
- **Streamline the planning process** and improve the communication between local and national authorities so as not to undermine the national green infrastructural requirements.

Education

- There is a **lack of practical knowledge** identified in our current stock of technical experts in the green sector.
- **Up-skilling key talent** (e.g. unemployed architects, electrical and mechanical engineers) in new technologies and processes through major green public building projects.

Funding

- **EU structural funding** doesn't currently match energy requirements.
- **Restructuring to properly align available funding with current energy needs**.

R&D

- Ireland is an ideal **“test bed”** for new green technologies, including the electric car and ocean energy.
- **Fast track public procurement** for specific new technologies as a means to encouraging private investment and development in the green sector.
- The group specifically recommend a **capabilities benchmarking exercise** (across universities) to highlight our expertise and encourage inward investment R&D.

Full Discussion

Action Area	Comment
Branding Ireland	How do we convince the public to go for low carbon houses etc. if we ourselves don't invest in it? We will only make the green agenda a national agenda by actually implementing green building programs and initiatives.
Branding Ireland	Ireland should be looking to innovate to create new green processes. The tax on plastic bags was a fantastic idea and should be the kind of thing Ireland looks to introduce going forward to cement the "Green Ireland" image.
Branding Ireland	The green agenda is seen as a party political issue and not a national agenda.
Branding Ireland	"Put it First". A significant campaign is required to establish the "Green Ireland" image at home and abroad. A cohesive marketing campaign across the entire public sector to ensure the immediate association between Ireland and the green agenda.
Branding Ireland	Despite our reputation as good networkers, we are actually quite fragmented. E.g. In the European context, our language limitations act as a barrier to fully engaging in projects and networks
Infrastructure	The Grid is our biggest constraint on future green infrastructural projects
Infrastructure	Ireland is lagging behind the rest of Europe in terms of infrastructural development. In particular, our rail network is inadequate and off-putting to foreign owned businesses looking to invest in Europe.
Infrastructure	In America solar energy has huge potential but is struggling to gain widespread support due to the fact that it is difficult to feed electricity from the hot desert areas to urban centres. Investment in wind-farms also takes a long time to generate positive outcomes due to infrastructural deficits. Before Ireland can start seriously investing in such technologies, it must ensure the infrastructure is in place to feed the energy produced to where it's needed.
Infrastructure	Example of a successful green infrastructural project that could be pursued in Ireland: In Shanghai, there has been a program to replace inefficient heating systems with heat pumps.
Funding	EU structural funding doesn't currently match energy requirement
Funding	Restructuring is required to properly align available funding with current energy needs.
Single Interface	Why do people have to have consultation on a national plan for electricity and then repeat the process on form filling and judicial review.
Single Interface	Streamlining the planning process and improving the communication between local and national authorities so as not to undermine the national green infrastructural requirements.
	We need "Directions not guidelines"
Strategic Focus	Extend renewables into ocean energy - opportunity here to export energy to Europe. Ireland is an ideal "test bed" for electric cars given its small size and geographical location.
Strategic Focus	European research project in Denmark - combine energy storage for cars with the electricity generated by wind energy.

Strategic Focus	Ireland should look to involve itself in large European R&D projects in the green sector. This will allow us to share risks, innovate on a larger scale, and steer projects in directions that favour Ireland's energy requirements. Denmark - Edison Project (Electric Cars).
Strategic Focus	A capabilities benchmarking exercise (across universities) to highlight our expertise and encourage inward investment R&D
Strategic Focus	The electric car might work in Ireland because we drive comparatively short distances, unlike, say, in America. Electric cars should be a project where Ireland leads the world. Our cheap electricity should be used in electric cars. The export market for this industry could be huge, which will in turn attract additional FDI in this area.
Strategic Focus	Israel is a world leader in electric car investment and innovation
Strategic Focus	A key focus for green jobs should be the digital economy. We have a lot of state fibre optics. Cities should be fibre capable in 5 - 10 years. The green economy will be electric
Strategic Focus	Rather than Ireland making cars or batteries for electric cars, we could become leaders in the data management associated with the electric car framework. Handling charges and switching things on and off intelligently. Ireland could be a leader in the design of the technologies for these data management devices
Skills & Education	Unemployed architects and mechanic/electrical engineers all over the place. Their knowledge and expertise is too specialised to be of real use in implementing the green agenda.
Skills & Education	Why doesn't the institute of architects steer architects towards green technologies and processes.
Skills & Education	Investment in Ireland's telecommunications system made us world leaders in the field and this helped to attract FDI (especially from America). We need a similar level of investment in up-skilling unemployed technicians in various areas to attract FDI in the future.
Skills & Education	Why don't the government technical agencies get together and organise a conference to decide how to move forward with technical training of engineers and others.
Skills & Education	For example, we ought to consider initiating several green public buildings projects as a way to train our technical workers and give them the skills and experience necessary to implement large scale green projects (e.g. Retrofitting public buildings) This will only be achieved, however, if the government lowers the risk profile of such projects in order to entice private sector investment.
Skills & Education	Project management skills from the construction industry would transfer over very naturally to these kinds of projects.
Skills & Education	We focus too much on the IT side, we should also invest in technology. We can only implement new technology if we do it ourselves. Energy contracting, done in Sweden, Germany, should be done in Ireland but we don't have the expertise. If we fought for energy projects with government support we could test our ability to complete energy projects and the benefits will accrue from there.
Infrastructure	The economic situation requires us to be imaginative about finance - government loans could be used to assist people to purchase environmentally friendly houses, which are normally quite expensive, by contributing to the high early mortgage payments. These higher mortgages would lead to future savings. This strategy could be applied generally to encourage greener domestic purchases.
Strategic Focus	A new car scrappage scheme with incentives to purchase replacement low emission vehicles could be an effective tactic to promote electric cars or low emission vehicles.

Infrastructure	Sustainable metrics included in all public procurement tenders (e.g. energy conservation metrics).
Infrastructure	There is already much enthusiasm within the private sector for investment in green projects – procurement laws are stifling this enthusiasm.
Infrastructure	Fast tracking public procurement for specific new (green) technologies as a means to encouraging private investment and development in the green sector.
Infrastructure	We could have legislation which requires household heating systems to be fuelled from onsite renewable sources. This prevents the implementation of district heating systems whereby the domestic heating systems could be fed more efficiently from a centralised source.

4.8 Group 8: How do we prioritize capital spending to fast track the infrastructure necessary for the Smart Economy and its attendant productivity gains?

Key recommendations

- Establish **new culture of consistency** in our approach to capital spending which has been stop-start over time, lacked focus and fluctuated with changes in the economic climate.
- Adopt a **creative long term focus**. We have spent sporadically and in a piecemeal manner across too many short term projects. Instead focus on specific areas and develop world class standards. Examples include healthcare, infrastructure thereby using the country as a laboratory for developing products and systems.
- Ireland must get the **basic elements** of infrastructure right. For international credibility we need to do the simple things really well. For example broadband is to the Ireland of 2009 what the quality of our roads was in the 1930s.
- Identify **clearer priorities** for infrastructural spending such as “What will create most **jobs**?” and “What will create greatest **Return on Investment**?”
- Government needs to champion **new and innovative approaches** to capital investment :
 - Seek opportunities to **partner** with both other governments and private sector to establish Ireland in world class infrastructure networks.
 - Continue to "**own**" **specific infrastructural investment** – return on investment requires ownership and oversight once investment has been completed.
 - Use the economic situation as an opportunity to create a **national will** to develop our infrastructure
 - sell a vision of a 21st century to Ireland.

Full Discussion

Action Area	Comment
Strategic Focus	We spread spending too thinly over too many projects rather than focusing on the core. We need a long term focus. There are opportunities to create business proposition to export and sell. Big healthcare export business
Funding	Cultural of investment - Long term thinking. There are dramatic needs everywhere because we have neglected spending over time. Shape people’s expectations to create a culture of investment - consistent and in the long term. Consistent spending is fundamentally important.

Action Area	Comment
Infrastructure	Government should champion the digital infrastructure. We have been too piecemeal in our investment over time. Periods of investment have been followed by breaks in spending. Government need to seek opportunities to work with the private sector and champion infrastructural investment and maintain momentum. Our broadband in 2009 - reflects the quality of our roads in the 1920s. We need free market economy. The basic structure is fibre - must be interconnected.
Single Interface	Government co-ordination to avoid fragmentation. Right now our cable network is owned and regulated by a variety of interests. The actual cable is not owned. Needs to be a strong person under the minister to rationalise the structure for the future - we need someone to set new standards and devise a strategy.
Branding Ireland	Need to acknowledge that whereas there is a lot more to do, a lot has been achieved in the last ten years
Strategic Focus	We should build special economic zones which must have right communications element. This includes the Government building up networks via Enterprise Ireland, state delegations and our network of embassies - need to secure the next wave of investment. We can do these things one step at a time and don't need to wait to do everything at a national level.
Strategic Focus	Economic zones can be a vehicle to selectively provide governmental support in a way which would be impossible to do on a nationwide level due to European regulations.
Strategic Focus	The next wave of investment will be from Asia. China is the toughest market in the world. To access it we should look at partnering with Singapore - we could form a joint special economic zone leading to commercial gain for everyone. Idea - leveraging our experience in economic zones to build new economic zones focused on networks etc. Develop international centres of excellence.
Infrastructure	The current economic situation should be an opportunity for politicians to create a national will to develop our infrastructure - as right now the cost of business in Ireland is uncompetitive. We need to sell a vision to people of Ireland - and get their buy in.
	Ireland could pick healthcare and use the country as a lab for developing products and systems which would improve the standard of living at home and could be sold abroad. Ireland a lab for its own products and processes
Strategic Focus	We need to focus on getting companies past the red stage and make ideas commercial
Competitive Environment	Go up value chain and partner with developing economies - don't compete on labour price. Ireland should be proactive in Europe, encourage 50 – 100 companies to come to Ireland to be here and head quarters.
Funding	Tap more areas for income. e.g. private savings. We need more creative ways of getting capital investments. Such as public private partnerships models, the pension industry. The funding base is not there. How do we maintain it?
Single Interface	We should look at alternative energy sources. Ireland is looking at waves and wind. What has been neglected on the energy problem is conservation. There is a next generation grid. We should buy energy and use it wisely.

Action Area	Comment
Infrastructure	There is a huge cost if pumping, distributing, or treating water. We are wasting electricity when we waste water. The next generation will be big users of electricity and Ireland need to be very conscious when taxing on energy consumption.
Competitive Environment	The cost of doing business has increased significantly. We need confidence in execution. There is a danger of too many big ideas. We must do the simple things really well.
Single Interface	Need to do basic things right.
Engaging the Diaspora	Diaspora should be really proud of Ireland roots. There is an affinity to deal with people.
Strategic Focus	We need to set our priorities and pick a few things
Strategic Focus	Jobs are the only thing that matters.
Strategic Focus	The Netherlands have a business-focused presence in their Singapore embassy in the form of one individual. Within 12 months of their appointment they had managed to win 12 contracts for the Netherlands.
Funding	Rebuilding ports and access is our big challenge. We should not build places but economic spaces. Are we saying that we can park transport and physical infrastructure if we have to prioritise?
Competitive Environment	There are other costs and logistics involved. These are major issues for high tech companies.
Single Interface	There is a terrific airport in Mayo which is not used
Single Interface	Public and private have different timelines. Both need doing. Employment must be a priority.
Single Interface	No country prospers if they do not invest.
Strategic Focus	Start with Dublin and roll out - prioritisation.
Strategic Focus	5% gap. 4% this year. We want consistency. We want the best economic return for investment - something that represents value for money. We need to sustaining employment, achieve optimum employment and prepare for the upswing. Education is the infrastructure we need.

4.9 Group 9: Tourism: how can Ireland position itself as a leading global location for the next generation of tourist?

Key recommendations

- To circumvent the problems associated with the **Schengen agreement**, those people who obtain Visas to visit the UK should automatically be allowed entry into Ireland.
- Invest in Dublin Airport to make it into a hub for **point-to-point flights** to Europe.
- The **value for money** available in Ireland is poor and this detrimentally affects our competitiveness.
- In terms of our marketing of Ireland abroad we are trying to be too many things. The group recommends that **consistent and simple branding** should be adopted to market Ireland abroad e.g. 100% New Zealand has been a consistent message for 10 years.
- The Irish Experience is no longer available in Ireland - Irish eyes are no longer smiling! The group recommends that more investment be made in the **marketing of hospitality** as a serious career option for Irish young people.
- **One body** should represent Ireland abroad.

Full Discussion

Action Area	Comment
Single Interface	Allow those with a UK visa to come to Ireland.
Single Interface	Government has the capacity to solve the problems - if there is a visa issue - it must be solvable.
Single Interface	Global competitive environment – The airport is hub infrastructure, security, facilities, cost, innovation. See the successful airports of Singapore, Abu Dhabi – they are consumer friendly and hassle free. Ireland is a fragmented systems - it requires strategic thinking. Lower fares are point to point and will take international travellers to London, but the point to point could be Dublin, which would be a major development.
Branding Ireland	Branding Ireland may involve a greater alignment in agencies that deal with tourism, so that people deal with one island. See example of New Zealand initiative where the bait for travel is learning English as a second language. Strategic concept if you are going to brand the destination align the entities
Competitive Environment	We are not cheap but we need to assure that we are offering value.
Branding Ireland	Need to capitalise on St Patrick's Day, to promote brand Ireland in a positive way. Example of 100% New Zealand Delivering the experience (NZ)

Action Area	Comment
Strategic Focus	China, ME, SE Asia there is a market but the incentives aren't there.
Strategic Focus	There is a vast reservoir of potential tourists in Asia. We need to appreciate the roughness of Ireland and we have got to promote this. Got to get people resources working again to promote the most successful export of Ireland. This is the biggest export income. The challenge will have to be taken up change the mentality of the Irish people sad to say the better workers in the hotels are foreigners where are the Irish eyes?
Skills & Education	Irish people are not going into the hospitality industry. They are not encouraged by their parents.
Branding Ireland	We must tap into why people want to come here have to deliver the promise. There is an issue in relation to hospitality where the warmth has been in consistent decline over 6/7 years.
Branding Ireland	British market is 48% of visitors. There is a dramatic decline in holidaymakers. There are lots more cheap choices. Is Ireland no longer fashionable?
Strategic Focus	There remains huge warmth in Britain towards Ireland, with progress in relation to the North there has never been a better time to promote Ireland in Britain.
Strategic Focus	Plan for the Olympics. In London this required a lot of capital investment the Australian swimming team want to come here. EI could focus on the contracts for building in London coming out of the Olympics.
Branding Ireland	Bring an Irish dimension to the Olympics.
Strategic Focus	Set someone the task of picking out a country e.g. Japan to really concentrate on that country for Tourism. Golf is a very expensive market. Instead do things such as hold an prize-giving on St. Patricks day to create a buzz and attract people.
Branding Ireland	Concentrate on simplifying the historical. Set up tours that trace your ancestors

4.10 Group 10: The Irish food and agriculture sectors face unprecedented challenges. What are the necessary changes to transform the sector to secure its future as a long term sustainable industry?

Key recommendations

Strategic Focus on Food for Ireland

- There is an **opportunity for Ireland to develop** the food sector. The world food demand is continuously on the increase. By 2030, 40% more food will be needed to meet demand, in 2050 that will have doubled. Ireland has the potential to contribute (in proportion to our size) to the world food supply. To do this we need to drive production efficiencies at a processing level in order to advance our margins and support innovation.
- A **process innovation drive in the food sector**. This will include integration of systems throughout the Supply Chain.
- Drive **export markets** and **risk management** to adapt our ability to be competitive.
- **Product traceability** is crucial to future export markets.
- Our food business must **use innovation to increase margins**. It must focus on commodities, improve ingredients and be technology-led.

Sector Network

- Establish a **food and beverage network** around the world maybe using the embassy structure to help build relationships and provide opportunities for market growth.
- Create **graduate placements** within the diaspora network to export sector knowledge and expertise and also to increase market opportunity.

Full Discussion

Action Area	Comment
Competitive Environment	Opportunity for Ireland The world food demand is continuously on the increase. By 2030, 40% more food will be needed to meet demand, in 2050 that will have doubled. Ireland has a role to play. Ireland has the potential to contribute (in proportion to our size), to the world food supply.
Strategic Focus	Apply the Smart Economy There is a need to apply the Smart Economy to the food industry. Process innovation applies as much to the food sector as it does to other industries.

Action Area	Comment
Infrastructure	<p>Basic Production efficiency</p> <p>We need to get our production efficiencies at a processing level right in order to advance our margins and support innovation.</p> <p>We need to adapt our ability to be competitive by driving export markets and risk management. We need to get our efficiencies right and at the same time build on brands and drive R&D investment.</p> <p>See diagram. There is a need for integrated systems through the Supply Chain. We can then drive efficiencies.</p>
Branding Ireland	<p>We need to look at how we brand Ireland focussing on sustainability and functionality. There needs to be recognition that we are a food nation.</p> <p>Branding is important. It is no longer sufficient to say we are green. We need to prove it. How can we use sustainability, biodiversity and translate that to an advantage?</p> <p>There is a potential market for importing Irish beef in the Philippines provided the import ban is lifted at a political level.</p> <p>The group felt that product traceability is also crucial to future export markets.</p>
Skills & Education	<p>The group suggested establishing a food and beverage network around the world, maybe using the embassy structure to help build relationships and provide opportunities for market growth. Graduate placements within the network are an opportunity to export sector knowledge and expertise and also to increase market opportunity.</p>
Strategic Focus	<p>The sector is not seen as having potential for growth, but it has in fact, serious potential.</p>
Strategic Focus	<p>We need to adapt our ability to be competitive. The industry has to do more. It needs to become more efficient in responding to market changes. Government needs to drive this through funding, support and facilitation. It needs to encourage R+D, Foreign Direct Investments and foster linkages for the country.</p>
Strategic Focus	<p>There are opportunities for us in the Chinese and New Zealand markets, if we can integrate the systems through the supply chain. We can then drive efficiencies. The Supply Chain is very important.</p>
Strategic Focus	<p>If we ask “where are the margins along the chain?” It is becoming obvious that the basic producer is in serious trouble.</p>
Strategic Focus	<p>We need to become efficient at producer level, but more than that, we need to look the whole way across the supply chain and get all of it right. Traceability will then follow.</p>
Strategic Focus	<p>The dominant share of the margin is taken by larger retailers at the end of the chain. We're not unique in that. In US it is the same. So we need to become more efficient.</p>
Branding Ireland	<p>Our Branding has to improve. Our Food Strategy should not just be about large volumes sustainable over time, but the development of a brand with strategy but also a brand that is efficiently produced.</p>
Branding Ireland	<p>The international market is tough. But we need to become competitive in our export markets. Branding can help with that. We need to look at 'Brand Ireland'.</p>
Strategic Focus	<p>Specialised ingredients have contributed to our success in the past. 20% of cheddar cheese in US comes from Ireland. We need to be able to produce on a large scale but at low cost. The commodity piece has to be fixed. We need to develop a branded strategy and the costs need to be right.</p>
Strategic Focus	<p>We need to remember the food safety angle and promote safe, wholesome food from Ireland.</p>

Action Area	Comment
Strategic Focus	We need to apply the principles of the Smart economy to food and look at creating unique value added foods.
Skills & Education	We need to encourage young people to go back to this industry. There is a wealth of information already here, in this country that we should be capitalising on.
Skills & Education	Irish people travel very well. They are prepared to go to China or Brazil or wherever the industry needs them. We want them to travel and learn and develop.
Funding	It is an undercapitalised industry right now. It is not an easy task but the government have to get involved.

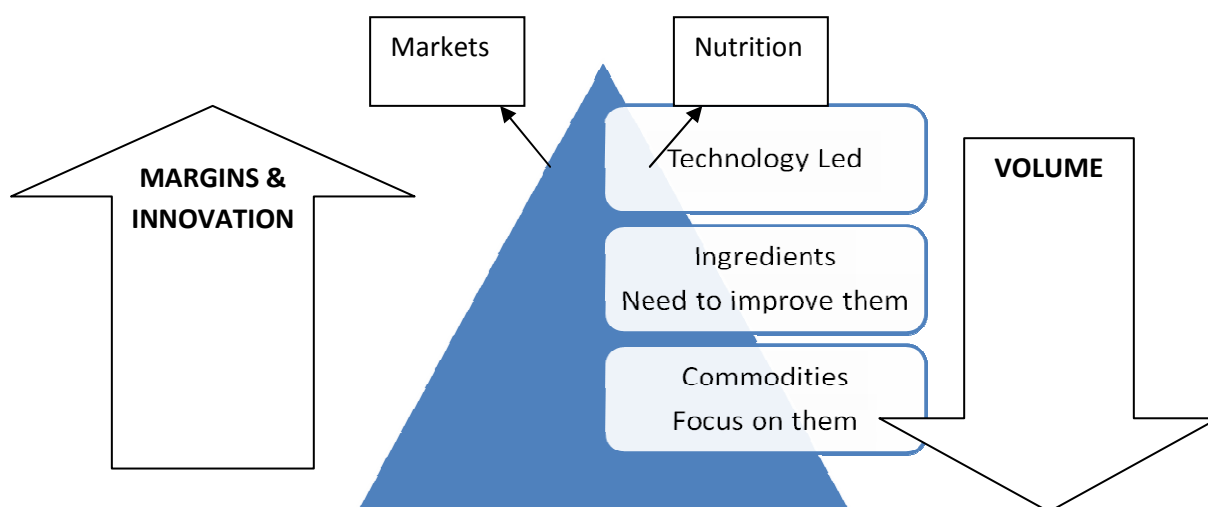


Diagram submitted with comments from Group 10

4.11 Group 11: What role can Ireland’s cultural and artistic capital play in developing our economy?

Key recommendations

- Develop a **portal to engage diaspora** along the lines of 'Imagine Ireland' or 'Gateway Ireland'.
- More targeted use of the marketing opportunity that **St. Patrick’s Day** provides globally.
- Create **Dublin festival** in summer, have concurrent (e.g.) Milltown Malbay festival, have this month known and branded as THE month to visit Ireland, when Ireland as a whole is THE place to be. Would be inclusive, encouraging diaspora.
- Build on the record and reputation of **Irish NGOs and aid groups**. For example, the recent Gates Foundation award to Concern.
- Irishness should be celebrated **365 days of the year** – not just on St. Patrick’s Day.
- Use theatrical thinking in developing the Irish image to enhance the content of public broadcasting for **the portal**.

Full Discussion

Action Area	Comment
Branding Ireland	Prospect of developing Ireland web 'Imagine Ireland' or 'Gateway Ireland' to engage diaspora. General site with specific links (art, travel, poetry, etc.), should be entertaining, witty, feature people from all walks of life & could be country specific. When Ireland represents itself abroad through artists, musicians etc, the website can carry it as an extra outlet. Whole site should have a sense of fun, should NOT reek of word culture, and should be modern, for a modern audience. Include current comedians, show irreverence & best of Ireland. Get Vox Pops from a range of visitors about why they like Ireland. Give people initiative to travel, bonds, vouchers etc. Trace your roots, exporters, entrepreneurs, inventors, Irish theatre could be incorporated and included with webcams. Create YouTube moments. Establish steering committee to guide process and have Ireland on the cutting edge communicating with world at all levels.
Branding Ireland	15% of RTE web traffic is from UK, 11% from US, RTE would be happy to act as host to such an Ireland website. On-line is a 'no-brainer solution' to so many aspects of how we establish contact with Irish people abroad, but also to connect with the many varieties of what it is to be Irish, whether it's the 'Quiet Man' version, or anything else. Challenge in harnessing this opportunity & steering committee suggested in previous point would be key.
Branding Ireland	Many websites (including RTE) miss the sense of theatre that a small production company could encompass in a website as envisioned in 'Imagine Ireland'.

Action Area	Comment
Branding Ireland	Utilisation of TV technology, theatrical thinking, would achieve sense identified for Ireland website. Should provide an ongoing dialogue between Ireland & diaspora, not static. May be costly, but could get sponsorship, just deliver the 'wow factor' & provide the 'water cooler' talking points for next day.
Branding Ireland	Ireland site should be interactive, use webcams, and actually PROVIDE diaspora with things. Have to be very clear in mind to narrative underlying website.
Branding Ireland	Has been acknowledged for years that technology is much underused in selling of Ireland.
Branding Ireland	St. Patrick's Day is when the brand of Ireland is most on display & not always good. Could display some form of counterbalance against the more stereotyped Irish elements. When Taoiseach presents bowl of shamrock to US president, could Taoiseach also announce Irish ambassadors for culture/ the arts for the year, to speak & demonstrate brand characters of Ireland that we actually want. Connection would reach 70 million around the world & start to shift perspective of the 'brand' worldwide. St. Patrick's Day presentation of shamrock to US president by Taoiseach - media opportunity
Branding Ireland	Inundated by Irish politicians before St. Patrick's Day every year, too much so. Real challenge is to remind people who come out on St. Patrick's Day that they are Irish the other 364 days of the year.
Branding Ireland	Irish people worldwide celebrate St. Patrick's Day; we need to focus on rest of year. Seeing Riverdance, hearing U2, they attract the mass market to Ireland & should be used more.
Branding Ireland	Create Dublin festival in summer, have concurrent festival e.g. Milltown Malbay, have this month known & branded as THE month to visit Ireland, when Ireland as a whole is THE place to be. Would be inclusive, encouraging diaspora.
Branding Ireland	Cooperation of all cultural groups in Ireland to achieve kind of month-long celebration that was suggested.
Branding Ireland	See the example of the South American celebration of Bloomsday. Different countries see Ireland as different things, Many nationalities in South America celebrate Saint Patricks day, but also celebrate Bloomsday and embrace Riverdance. Idea of Irish cultural ambassador very important, & could be gateway to do business with others who may empathise with shared history, literature.
Branding Ireland	Businesspeople are not necessarily familiar with art, yet all the delegates were here because of an association with Ireland that was emotional & cultural related. Government should be informed to drop notion of Saint Patrick's Day association with drink. Should be noted & recognised that people are here because of their notion of & links with Ireland.
Branding Ireland	First annual Irish Theatre festival in NY took place & was very powerful. During financial crisis would not wish to divert resources from the artistic areas. e.g. Riverdance and its availability on US public TV. There is a current dearth of good content for PBS, there may be opportunities to improve this & keep Irish image strong through culture, replacing negative financial image. This image can translate positively to other areas.
Branding Ireland	There are free things that can provide opportunities & don't require a great deal of money to push Ireland.

Action Area	Comment
Branding Ireland	To get something exciting happening & create opportunities, need to be courageous. Language should be all encompassing - 'Smart' can be interpreted as derogatory terms, wisdom perhaps is better. Need to value high intelligent, value IQ. Can take it that we have achieved a certain standard in literature, are people encouraged to replicate or innovate? Should innovate, not imitate. Riverdance showed link between language, music & dance that exemplifies this, was innovative & should be encouraged.
Branding Ireland	Imagination should be used more in Ireland & recognised. Is extraordinarily rich as a resource & valued by many as a source of originality.
Branding Ireland	Pre-Celtic Tiger, people identified Ireland with caring - nursing, warmth - something that should be sought out & encouraged again. Use this other softer side of Ireland to counteract drunken St. Patricks Day image.
Branding Ireland	Some brands have failed, e.g. the 'Irish pub'. Can be damaging in a way. See the success of brands such as L'imaginarium in France.
Branding Ireland	Gift of Seamus Heaney poems was excellent.
Skills & Education	There is acknowledgement that there will be hard years ahead financially, culture provides a good counterbalance. A subset of the creative society is the creative economy and this needs education. Arts & culture coverage in primary education is patchy at best. Creative society should blend music & maths. Huge amount to learn & gain that requires long-term structural changes in education & other systems.
Skills & Education	Engaging culture in education is needed & needs to be specific to Ireland. Cuts in culture/ arts will create a huge problem as they advertise a huge failure in self esteem. It is global circumstances & economy that are failing the people, not people failing the economy.
Skills & Education	There are some programmes being initiated and as a result of becoming unemployed, people are rediscovering culture through study.
Skills & Education	Secondary schools need to be revamped to include the arts & recognise them as valid options.
Engage the Diaspora	There was a month of celebration of an Irish woman in India for her aid work, yet she wasn't celebrated here. Missionaries & Irish Aid are no longer celebrated.
Engage the Diaspora	Use Irish aid groups if they can be of help. Concern just received \$41 million donation from Gates foundation for cutting edge research being done, should be highlighted & used. Concern took footage of Swat Valley in Pakistan, which Channel 13 were eager to use and gave great credit to Concern for providing original footage. Unicef/ Aer Lingus adverts were cited as excellent example.
Engage the Diaspora	Einstein 'Often the things that can be counted don't count, and the things that cannot be counted that are really important'. The first thing used when selling Ireland abroad is cultural images, they appeal to the emotional part of our being that has a huge impact on people. Would prefer to use term 'Knowledge' Economy, all knowledge is relevant & worth holding, even if it doesn't seem relevant in a particular moment.
Engage the Diaspora	Need to recognise the reverse diaspora - the full Russian/ Lithuanian/ Polish, but half Irish people, going home & bringing their image & news of Ireland with them. No matter how niche a market may seem we should never be ignored, holistic approach should always be included since you never know who you may reach. The winner of bursary to research Irish place names this year was Russian.

Action Area	Comment
Engage the Diaspora	Be aware of changing elements of Irish diaspora, average age 30 years ago was 84, now 41. American Irish Historical Society, average member age has dropped 40 years in last 30
Single Interface	Need an end to the bureaucracy mind. Good scholars are spending their time filling out endless forms, faculty are becoming managers and administrators. Don't know any time when he's seen so much alienation of fine people in 3rd level education. Tell heads of universities to encourage creativity, have a creativity month.
Single Interface	Involve academia in this cultural steering group/ ambassador, and also have them involved abroad, not just in Ireland.