

Cross Cutting Issues – Enterprise Supports

1. Introduction

This paper outlines the various agencies involved in delivering enterprise supports in Ireland. These agencies span across a number of Departments including: Department of Enterprise Trade & Employment, Department of Community Rural and Gaeltacht Affairs, Department of Arts, Sports & Tourism and the Department of Agriculture and Food. Some of the agencies are involved in direct aid to industries while others are involved in promoting an industry sector. Some are involved in supporting micro enterprises and others in supporting larger enterprises. Most of the agencies are involved in job creation and sustaining existing jobs. While some of these agencies have particular regional or local focus in their delivery, they all share broadly the same objective and operate in a common space. This paper examines if there is potential for efficiencies to be realised by looking at the scale and structure of enterprise supports across this shared space.

2. Outline of Enterprise Supports

The Department of Enterprise, Trade & Employment (DETE) has the lead role in policy making in enterprise and consequently enterprise supports in Ireland. This is led by the Enterprise and Agencies Division within DETE and implemented by a range of different agencies. There are 7 agencies under the aegis of DETE involved in different aspects of policy and implementation for micro, small & medium enterprises, larger enterprises, indigenous industry and FDI and certain regions respectively. There are a further 8 agencies under the aegis of the Department of Community Rural and Gaeltacht Affairs, Department of Arts, Sports & Tourism and the Department of Agriculture and Food responsible *inter alia* for enterprise supports in specific sectors or regions. The agencies attached to the relevant Departments break down as follows:

Department of Enterprise Trade & Employment

- IDA Ireland
- Enterprise Ireland
- County & City Enterprise Boards

- Shannon Development
- Business Innovation Centres
- Forfas
- Inter Trade Ireland

Department of Community Rural & Gaeltacht Affairs

- Údarás na Gaeltachta
- Western Development Commission
- Leader/Rural Development Programme

Department of Agriculture & Food

- Bord Bia
- Bord Iascaigh Mhara
- Teagasc

Department of Arts Sports and Tourism

- Failte Ireland
- Tourism Ireland

The agency model is the preferred model of the various responsible Departments for administration of enterprise supports. The increasing tendency towards agencification has been the subject of much negative comment in recent times but in this sector there are strong arguments for use of specialist agencies with appropriately skilled staff to deliver many of the services direct to industry. Accordingly, with the exception of policy advice and formulation, this paper doesn't seriously consider the possibility of eliminating the agencies and merging the functions back into the relevant civil service structures within Government Departments but rather considers whether a different arrangement or structure of agencies would be more appropriate.

The current Exchequer costs of providing the services administered by these agencies are:

Table 1: 2009 Budget Allocations by Agency

Agency	Budget 2009 Allocation
Enterprise Ireland	€156.799m
Shannon Development	€1.534m
Forfas	€37.593m
Údarás	c.€18.565m*
Western Development Commission	€4.760m
Leader	€27.000m
Bord Bia	€25.344m
Bord Iascaigh Mhara	€44.500m
Fáilte Ireland & Tourism Ireland	€159.746m
Teagasc	c.€18,300m*
Intertrade Ireland	€9.500m
Business Innovation Centres	Exchequer funding provided by EI
County Enterprise Boards	€34.847m
IDA Ireland	€137.049m
Total	€675.56m*

*This is based on an estimate of the amount of Teagasc's (15%) and Údarás's (50%) budgets allocated to enterprise supports with respective total Budget 09 allocations of €122.0m and €37.129m.

Appendix 1 attached outlines a description of each agency and the accompanying tables and bar-charts outline the trends in numbers, remuneration, Exchequer commitment, jobs created etc over a 5/6 year period.

Common Roles and Objectives:

Table 2 below outlines the degree of overlap between the various enterprise support agencies. They can be broadly divided into four categories with some agencies fitting into more than one category:

- agencies involved in delivering enterprise supports to established and start-up businesses in Ireland: Enterprise Ireland (EI), Shannon Development (SD), Western Development Commission (WDC), Údarás na Gaeltachta, Inter Trade Ireland, County & City Enterprise Boards (CEB), Business Innovation Centres (BIC), Leader, and Teagasc;
- agencies with a significant focus on industry promotion and marketing: EI; Bord Bia, Bord Iascaigh Mhara, Tourism Ireland and Fáilte Ireland;
- agencies with a significant policy advice function: Forfas and WDC;

- agencies engaged in attracting Foreign Direct Investment: IDA and Shannon Development.

Despite the shared objectives and characteristics of many of these agencies, subtle differences exist which distinguish them from one another. In the promotion and marketing area the primary distinction is between the industries/sectors supported whereas in the policy advice and the FDI areas the distinction is geographical. Within the broader enterprise supports sector the primary distinctions are the scale of enterprise (micro; SME; large enterprises) and the size of the geographical area covered (local level; county level; specific, defined regions; national level) while some have a specific rural development focus (Leader also has a part EU funded dimension and previous attempts to amalgamate Leader with the CEBs failed for this reason).

Table 2: Functions of Agencies

	Policy Advice	Promotion of industry	Promote regional enterprise	Promotion of market	Support to Macro industries	Support to Micro industries	Job creation	Sustaining jobs	Supply of premises	Training	Capital Investment	Financial Support
Enterprise Ireland		X	X	X	X	X	X	X	X	X	X	X
C.E.B's			X			X	X	X		X	X	X
Shannon Development		X	X						X			
Business Innovation Centres			X						X	X		
Forfas	X	X										
Inter Trade Irl.		X	X		X	X	X	X				X
Údarás na Gaeltachta		X	X	X	X	X	X	X	X	X		X
W D C	X	X	X	X	X		X	X			X	X
Leader			X			X	X	X		X		X
Bord Bia		X		X								
B I M		X		X				X		X		X
Teagasc		X		X						X		
Faite Irl.		X		X	X	X				X		
IDA		X		X								
Total												

3. The original rationale for and continuing relevance of Enterprise supports - and the level of provision in the current economic environment

The ultimate rationale for providing Government supports to establish and promote private enterprises is to maximise employment and output. Given the range and diversity of activities encompassed by the various State agencies in this sphere, differing market failures will underpin the original decision to provide these services through the public sector.

Using the four categories outlined in section 2 above, the original market failures can be attributed as follows:

- The market failure justifying investment in enterprise supports to start-up and established businesses in Ireland is primarily driven by information asymmetries both in terms of access to investment finance and business skills and training which in the absence of state intervention would lead to underinvestment in and less well managed private enterprises yielding sub-optimal employment levels and lower output.
- Industry promotion and marketing agencies are usually established by Governments to promote industries which are comprised of large numbers of small enterprises who would not come together to invest in marketing and promotion collectively but where national and international marketing would still benefit the industry as a whole resulting in increased turnover and consequently employment and profitability. The market failure is similar for national trade boards whose function is to assist all firms in marketing internationally: individually the majority of firms couldn't afford investment on the scale required to establish significant international trade routes; there are too many and too diverse a range of firms to collectively fund this service; and ultimately the cost of the investment should be exceeded by the added value in terms of increased exports.
- The provision of objective policy advice functions is a public good which would never be provided by the private sector. The rationale for providing policy advice is to inform Government on appropriate policy and strategies to develop and maintain employment and output in the economy.

- Supports to promote foreign investment in Ireland are driven by information asymmetries and the requirement to compete with other jurisdictions for investment. In a world economy where global businesses operate from multiple locations, serving local or regional markets, Ireland must compete with other countries for its share of foreign investment if the Irish economy is to operate at or close to potential – indigenous industry is simply not of sufficient scale to achieve this on its own. To compete effectively in this market, the government informs potential investors about the relative merits of Ireland and provides additional subsidies/incentives where appropriate. These services will never be provided by the market as there are no private incentives to provide them.

The rationale for providing enterprise supports to maximise employment and output remains as important today as it was when many of these agencies were initiated. Indeed in the current economic climate featuring rising unemployment and difficulties experienced by small and medium business in accessing credit, some of the services provided by the enterprise support agencies are more relevant and important now than in the recent past. Nevertheless, there has been an increase in the staff employed, Exchequer contribution, and premises occupied by these agencies and that scale and diversity of provision isn't necessarily justified notwithstanding the worsening employment situation.

Moreover, the continued market failure necessitating State provision of promotion and marketing agencies is open to question. While, in general there is a clear benefit to assisting firms engaged or wishing to engage in international trade the preponderance of the benefits arising accrue directly to the firms rather than to the general public and in this context it should be feasible either for a private body to deliver these services at a fee to the relevant companies or for the relevant State Agencies to charge beneficiaries for their services. A separate consideration arises in respect of tourism marketing and promotion, the effectiveness of which must be open to question in light of the global economic downturn and the strong euro exchange rates.

4. Expenditure, Numbers employed and Trends

It can be seen from Table 3 below that there are in the region of 3,000 staff employed in agencies related to enterprise supports. Table 4 tracks broad percentage changes in their staffing levels, salary costs and overall Exchequer cost. While staff numbers and overall Exchequer cost are almost all on the increase over the last 5 to 6 years this is not reflected in an increase in outputs – see section on effectiveness below.

Table 3: Staffing and Pay Costs of Agencies¹

	No.'s employed: 2008*	Remuneration costs 2007*(€)
Enterprise Ireland	982	73m
C.E.B's	152	9.1m
Shannon Development	130	18.6m
Business Innovation Centres	37	2m
Forfas	130	7.9m
Inter Trade Irl.	41	1.4m
Údarás na Gaeltachta	57 ²	3.7m ²
W D C	16	1m
Leader/RDP	219	8.3m
Bord Bia	97	9.2m
B I M	153	6.1m
Teagasc	239 ³	13.5m ³
Failte Irl.	390	27.6m
IDA	282	24.1m
Total	2,925	205.5m

¹ Remuneration figures sourced from 2007 annual reports from all agencies except CEB's, BIC & Leader who do not produce annual reports. Figures for these agencies sourced from Vote sections

² Numbers employed & remuneration are 50% of total for Údarás, Total No. employed 113, total remuneration €7.4m

³ Numbers employed & remuneration are 15% of total for Teagasc, Total No. employed 1,590, total remuneration €90m

Table 4: Costs: Cumulative Change 2003 – 2008 (%)

	Staff employed	Paybill costs	Total Exchequer Grant
Enterprise Ireland	1%	15%	38%
County & City Enterprise Boards	4.1%	17%	8%
Shannon Development	-27%	2%	-54%
Business Innovation Centres	28%	51%	27%
Forfas	4%	33%	78%
Inter Trade Irl.	No change	13%	25%
Údarás na Gaeltachta ⁴	-	-	-
Western Development Commission	6.7%	39%	33%
Leader ⁵			-2.9%
Bord Bia	23%	60%	57%
Bord Iascaigh Mhara	-14%	27%	110%
Teagasc	-2%	14%	16%
Faílte Irl. ⁶	88%	58%	56%
IDA	-3.5%	2.6%	4.5%

Table 5 overleaf outlines the source of funds of the main support agencies for indigenous enterprises and their expenditure on grants, marketing and administration. The most striking feature is the disproportionate level of funding granted to certain regions – the Gaeltacht, Shannon and the West – and certain industries – Tourism and Food. The marketing and promotion budgets alone for these two industries come to €115m, while direct grants to the tourism industry exceed those provided by EI (excluding STI allocation) to industry in general.

⁴ Figures not available from Údarás.

⁵ Leader percentage based on 5 year period 2004-2007 as figures for 2008 are unusually low due to the programme coming to an end. No staff employed or remuneration figures available for 2003-2007.

⁶ Faílte Irl percentages based on 5 year period 2004-2008. In 2006 staff of the RTAs were subsumed into Faílte Ireland with a consequent increase in Faílte Ireland's numbers

Table 5: Income & Expenditure Extracts – 2007 Annual Accounts**

	EI € (000)	S. Dev € (000)	Forfas € (000)	Údarás € (000)	WDC	B. Bia € (000)	BIM € (000)	Failte Irl € (000)	IDA €(000)	Tourism Irl. € (000)	Teagasc ⁷ € (000)	ITI ⁸ € (000)
INCOME												
Exchequer	159,819 ⁹	2,076	32,657	39,369	5,836	34,006	48,005	101,961	124,623	58,756	149,802	9,676 ¹⁰
EU funds		53		1,921			57	8,768			1,361	
Own resources/own resources	14,936	31,642 ¹¹		6,900	16	9,740 ¹²	2,232	22,842	19,708	2,089	30,413	150
Total income	174,755	33,771	32,657	48,190	5,852	43,746	50,294	133,571	144,331	60,845	181,576	14,664
EXPENDITURE												
Grants Paid/Supports direct to enterprise	44,955	1,781		19,744	3,406 ¹³		33,760	48,350	78,518		4,225	6,853
Grants to other Enterprise Bodies	19,378											
Marketing & Promotion						29,530	5,995	37,766	11,209	41,375 ¹⁴		
Administration less Remuneration	35,090	8,263	8,951	3,631	1,631	4,862	3,192	14,356	10,547	7,427	41,350	1,124
Remuneration	72,685 ¹⁵	18,591	7,855	7,402 ¹⁶	977	9,164	6,059	27,591	24,052	11,430	90,455	1,370

(**Table does not include figures for Leader, BIC's or CEB's as these agencies do not publish annual reports)

⁷ Teagasc figures refer to total income & expenditure, only a small % (unconfirmed) represents expenditure on enterprise supports

⁸ Based on 2006 Annual Report

⁹ Excludes €114m STI programme, Includes Grant for CEB's €8.9m

¹⁰ This figure and all expenditure figures represent the 2/3 Funded by Irish Exchequer, Other Public funding of €4.838m funded from N Ireland Exchequer

¹¹ This figure is comprised of rental income €17,115m & Tourism income €14,527m

¹² Includes income €5,306 from statutory levy (a levy is charged per head on slaughtered or exported livestock)

¹³ Transferred to WIF

¹⁴ All expenditure figures represent 75% of total which is funded by Irish Exchequer, the remaining 25% funded from N Ireland Exchequer

¹⁵ Represents total remuneration & admin. costs for EI, including STI element

¹⁶ Represents total remuneration & admin costs for Údarás including promotion of language

5. Effectiveness

Table 5: Outputs: Cumulative Change 2003 – 2008 (%)

Agencies	Numbers trained	Jobs created	Enterprises supported	No. employed in sector
Enterprise Ireland	-15%	-22% F/T 1.2% P/T	16%	
County & City Enterprise Boards	72% ¹⁷	5%	-3%	
Shannon Development		-64% ¹⁸	-98%	
Business Innovation Centres	200%			
Forfas				
Inter Trade Irl.		85% ¹⁹	23%	
Údarás na Gaeltachta				
Western Development Commission		-36%	-75%	
Leader ²⁰	13.4%	9.4% F/T 56% P/T	-46%	
Bord Bia	-	-	-	
Bord Iascaigh Mhara	15.2%	-37%	17.6%	
Teagasc	9.5%			
Failte Irl. ²¹	80% ²²			21%

¹⁷ Percentage increase for numbers trained for CEB's is over time period 2004-2008

¹⁸ Responsibility for indigenous industry transferred to EI in 2007 which helps explain negative figures for Shannon Dev. for job creation/Enterprise supported

¹⁹ Percentage increase based on 4 year period 2005 -2008 for jobs created & enterprise supported

²⁰ Leader percentages based on 5 year period 2004-2007 as figures for 2008 are unusually low due to the programme coming to an end

²¹ Failte Irl percentages based on 5 year period 2004-2008

²² Clarification & categorisation of training is required to validate these percentage increases

As mentioned in section 2 above the rationale for enterprise supports remains as valid and as important now as when initiated. In the current climate any measures that endeavour to stimulate the enterprise sector must be seen to deliver tangible outcomes proportionate to Exchequer monies committed. When analysing figures received for this exercise the outputs of some enterprise supports and how they are measured and reported is questionable. In some agencies jobs created and enterprises supported are in decline over the last 6 year period against a backdrop of increased funding. Table 5 outlines the position over a 6 year period for agencies where output figures could be sourced.

There seems to be considerable difficulty in producing outputs figures for some of the agencies and when produced they are not clearly defined. Enterprise support agencies should be in a position to produce cumulative figures over the past number of years which show a net position. For example Agency X created Y number of jobs in 2004, Z number in 2005..... a net output should also be available. Much of the agencies' outputs relate to training which encompasses many forms ranging from one day conferences, to on the job training but no efforts are made to break down these outputs into more defined distinguishable figures which would help to comment on effectiveness.

A number of Vote sections were able to extract data on the estimated average grant cost per job created. Information received for this exercise informs us that the estimated average grant cost per job is;

Estimated average grant cost per job				
	2007	2008	Average	
EI		6,111		
Shannon Dev.	7,396			
Údaras*	10,883			
WDC	5,525			
BIM	60,014			
CEB			5,949**	

*Figured obtained from Údarás 2007 annual report

**Year unspecified

As can be seen above there are large variations in the average grant cost per job. One approach to calculating average grant cost per job should be agreed by all enterprise support agencies. A new revamped EI with responsibility for enterprise supports should be able to produce more consistent figures which would allow analysis of effectiveness. Based on the figures above Bord Iascaigh Mhara and Údarás represent the least cost effective method of creating jobs as the current system exists.

Údarás were unable to provide the relevant Vote section with any output figures in relation to enterprise supports. This raises fundamental governance questions about their capacity to account for the value delivered from the Exchequer resources provided.

6. The degree of overlap between the different mechanisms of providing enterprise supports

Services Provided

Table 2 highlighted the extent of the overlap in services provided across the various agencies involved in delivering supports to indigenous private enterprise:

- There are seven agencies involved in providing various types of direct financial support/investment to indigenous enterprises – Enterprise Ireland; Údarás na Gaeltachta; Western Development Commission; County Enterprise Boards; Intertrade Ireland; Bord Iascaigh Mhara; and, Leader. While the majority of these are in a slightly different space – different geographic areas; different sizes of business; different economic sectors – these could all be serviced by a single organisation with a broader remit. [In 2007 EI took over the responsibility for developing and strengthening the indigenous industry sector in the Shannon region.]
- Four agencies – Enterprise Ireland, Shannon Development; Údarás na Gaeltachta and the Business Innovation Centres – are all involved in supplying premises to enterprise.
- Eight agencies provide training services for businesses – Enterprise Ireland; Údarás na Gaeltachta; County Enterprise Boards; Business Innovation Centres; Bord Iascaigh Mhara; Teagasc; Fáilte Ireland; and, Leader.
- Five of the agencies examined pursue the goal of promotion of and marketing of a particular industry or industry in general at a national and at an international level – EI; Bord Bia; Bord Iascaigh Mhara; Tourism Ireland and, Fáilte Ireland – although in line with Budget 2009 the marketing/promotion functions of B.I.M are to transfer to Bord Bia.

The high degree of overlap would suggest it would be more efficient to deliver some of these services through a single indigenous industry enterprise supports agency, such as a revamped Enterprise Ireland. This agency would deliver all enterprise supports provided directly to indigenous enterprises including direct financial

support/investment; supply of premises; training; and direct marketing support, assistance and advice. This newly constructed EI could be structured along regional lines with offices in each county to ensure access at a local level and to enable appropriate emphasis be granted at a regional level (consistent with, and where appropriate replacing, the current emphasis on Shannon, the Western region and the Gaeltacht). It would not, at this stage take over the general marketing functions of Failte and Tourism Ireland or Bord Bia and Bord Iascaigh Mhara although pending the success of the initial amalgamation of the other agencies' functions into a revamped EI these sectoral marketing functions might be considered for future integration. It should also be noted that InterTrade Ireland and Tourism Ireland may not be amenable to this type of restructuring in light of their North South remit.

Two agencies are involved in securing foreign direct investment – IDA Ireland and Shannon Development. This function could be more efficiently carried out by a single body – IDA Ireland who could be given responsibility for FDI throughout the country. Regional emphasis could still be achieved within a consolidated structure.

In relation to the national policy and advice functions of the agencies there is an overlap in terms of policy formulation and advice between the DETE, Forfas and the Western Development Commission. The arguments for and against a separate agency for the purpose of research and policy advice has been addressed in the DETE Vote discussions and are not revisited here. Nevertheless, it is clear that whatever merit there might be to having a special agency for this purpose, this body should be capable of giving specific emphasis to particular regions in furtherance of established policy objectives.

Office Space

Internationally, there is significant duplication of overseas offices with EI, IDA, Bord Bia, B.I.M. and Tourism Ireland all having significant numbers of overseas offices. In total they have 80 overseas offices – see list at appendix 2 - between them which could be reduced to 45 offices if they all shared office space in these cities (excluding Tourism Ireland, the figures are 59 overseas offices reducible to 38). The need for standalone offices for the enterprise support agencies could be further rationalised by

23 offices if these functions were delivered from within Irish embassies (subject to availability of space) where there is a geographic overlap.

7. Recommendations and Potential Savings

The previous section has outlined numerous overlaps which occur in the area of enterprise supports and suggested some possible rationalisation of the delivery agencies. It is considered that a rationalised system of direct enterprise supports dominated by two agencies – IDA and Enterprise Ireland – would be easier and less costly to administer while also providing a more user-friendly service to end-users as they would provide a single point of contact for enterprises seeking to access the various State supports.

1. It's recommended that the County and City Enterprise Boards, Leader, the Business Innovation Centres in full, and the enterprise support functions (including training and supply of premises) of Shannon Development, Western Development Commission, Údarás na Gaeltachta, Bord Iascaigh Mhara, Inter Trade Ireland and Teagasc should be merged with Enterprise Ireland to form a single agency responsible for delivering financial support; training; premises; and business advice to indigenous industry in Ireland regardless of size, location or sector. Data referred to earlier in relation to average grant cost per job created reinforces the argument to take responsibility for job creation from agencies such as Bord Iascaigh Mhara and Údarás where this figure was high compared with other agencies. This should give rise to three potential sources of savings:
 - i. Salary costs: A revamped EI would not require the same level of staffing as the cumulative staffing levels in each of the individual agencies at present. Efficiencies should arise both in administration and general back office work but also in front office/account executive type work. Without undertaking a detailed staffing analysis of each of the agencies any estimate of the quantum of potential savings would not be robust. Nevertheless, if you consider that EI alone employs 982 staff at a total cost of €73m (in 2007) compared with 282 staff in the IDA, then notwithstanding that some of the EI training and advice

work is labour intensive, the staffing levels seem disproportionate in comparison with the IDA. [The EI staff numbers include staff involved in science and technology programme (STI) spending as well as other enterprise supports]. If they were organised on a regional structure basis with, say, 4 staff in each of their 32 overseas offices, then at their current staffing levels allowing, say, 50 staff for head office administration they could still allocate over 30 staff to each of the 26 counties (either based locally or in the regions, or most likely a mixture) to service local and national enterprises, including the ongoing administration of STI investment. There is an arguable case that this number should be sufficient without the need for additional staffing from all the other agencies whose functions could be integrated into a revamped EI. Based on remuneration costs disclosed in their 2007 annual accounts, this would imply a potential saving in the region of €30 -35m²³.

- ii. Office accommodation: Savings should occur in relation to accommodation. Where previously 2 or 3 offices may have existed in a location this should be reducible to one office for the merged agency. However, it's not possible to estimate the extent of any savings which could be achieved without undertaking a full property survey as existing CEB and other local/regional offices may not be suitable to accommodate the enlarged EI. In relation to foreign offices, savings should also be achievable as multiple offices in foreign locations would no longer be required. In total 26 foreign offices (including Tourism Ireland offices) should fall into this category. Again a full property survey of international office accommodation would be required to estimate the level of potential savings.
- iii. Financial Supports to Industry: In 2007, almost €20m was allocated to enterprises under the remit of Údarás and €34m to the fishing industry (under the remit of B.I.M.) compared with c. €45m to companies coming within E.I.'s remit (excluding STI allocation to EI). These Gaeltacht area and fishing industry sums are totally disproportionate in comparison with the EI funding. Allocation of available financial supports for industry by the revamped EI

²³ Based on the pay costs of the CEBs, BICs, half of Údarás, the Western Development Commission Leader and Bord Iascaigh Mhara.

would ensure that all funding was used to maximum effect across all industries and not earmarked for specific regions or sectors. To reflect the increased efficiency which should be achievable from this integrated structure, particularly in respect of the current disproportionate emphasis on certain regions and sectors a 20% reduction in overall financial supports to industry should be achievable yielding c. €20m.

Notwithstanding the potential savings and the obvious efficiency arguments in favour of delivering supports through a single agency, such a revamped EI would be a critical element of business development and support infrastructure. In this context, it would be absolutely critical that it should have a strong management team focussed on ensuring that it delivers outputs and outcomes commensurate with the resources invested. This would be complemented by close oversight by DETE of its performance.

2. Teagasc and Údarás have substantial functions which would not seem to fit with a revamped EI. While it is beyond the scope of this paper, it would seem that in the case of Údarás, their remaining functions might be capable of being merged back in to D/CRAGA whereas in the case of Teagasc, the functions which would move to EI would be small relative to their overall remit and they would most likely continue on as were but with a slightly reduced staff complement.
3. EI and IDA share accommodation in a number of locations in Ireland and the remaining locations where both EI and IDA have offices should be examined to consider the feasibility of sharing accommodation. They should also consider the feasibility of sharing offices abroad. They currently have duplicate offices in 9 cities and elimination of these would target savings between the two agencies. As noted earlier, a full property survey would be required to estimate potential savings.
4. The foreign direct investment functions of Shannon Development should be merged with the IDA and the tourism functions should be allocated to Tourism and Failte Ireland. This combined with the transfer of its indigenous industry functions to EI would allow Shannon Development's considerable own resource

income be used by these other State agencies for the general purposes of enterprise promotion and support throughout the country rather than exclusively in the Shannon region.

5. In terms of the trade agencies, consideration should be given to charging industry directly for services provided. While it is not feasible to levy all food exporters and tourist industry operators to recoup the costs of marketing as they are too numerous and diverse and there would be significant disagreement over who benefits (for example, should pubs and restaurants be asked to contribute to the tourism promotion budget and if so on what basis or should farmers be asked to contribute to food export promotion activity and if so on what basis) firms attending trade missions or accessing information for the purposes of developing trade links could be charged a reasonable user charge reflecting the fact that the benefits arising largely accrue to the firm.
6. The marketing and financial support budgets of the tourism agencies and the marketing budget of the food agencies are completely disproportionate to the level of funding provided to EI. Consideration should be given to cutting these budgets in half as a first step to bringing them more into line with the funding available to other sectors. The marketing budget in Failte Ireland has risen by almost 50% in the period 2004 -2007, while the marketing budget in Tourism Ireland funded by the Irish Exchequer has risen by 55% in the period 2003 to 2007. Based on 2007 figures extracted from the 2007 annual reports a reduction of 50% of the marketing budget of Failte Ireland and Tourism Ireland would yield savings of almost €40m. The marketing & promotional budget in Bord Bia has risen 113% in the period 2003 – 2007. Based on 2007 figures extracted from the 2007 annual reports a reduction of 50% in the marketing & promotional budget in Bord Bia would yield savings of almost €15m.

Possible Arguments Against:

1. Service to end-users would suffer as a result of rationalisation particularly for micro enterprises which would have used the services of local and regional offices. However, the adoption of the proposed county level structure with local

experts in dealing with micro-enterprises should ensure these services don't suffer. Having one point of contact should indeed make the service more user- friendly.

2. The new agency wouldn't put sufficient emphasis or resources into the Shannon, West or Gaeltacht regions.
3. The food and tourism industries are particularly important to the Irish economies, even more so at the time of an economic downturn and more resources, not less, should be allocated to ensure that they are able to weather the global recession.
4. A new revamped EI with many more roles and functions may take a considerable amount of time to familiarise itself with its new remit at a cost to enterprise in Ireland.

Appendix 1

Enterprise Ireland

Enterprise Ireland is the lead government agency responsible for the development of Irish enterprise. Its mission is to accelerate the development of world-class Irish companies to achieve strong positions in world markets resulting in increased national and regional prosperity. Enterprise Ireland's activities, both domestically and in its international offices, are aimed toward helping client companies to increase their export sales and have a key focus on the following:

- Achieving export sales
- Investing in research and innovation
- Competing through productivity
- Starting up & scaling up
- Driving regional enterprise

At any given time, Enterprise Ireland has approximately 3,300 client companies which it actively supports. These are companies that currently or in the near future will significantly contribute to Ireland's export base. There is ongoing churn in this base as new companies join and other companies drop out. EI clients fall into three main categories:

- Manufacturing and internationally traded services companies employing ten or more people (and with a focus on exporting)
- Innovation led start-ups with the potential to grow on international markets (and entrepreneurs with the ability to initiate projects that can compete in international markets)
- Irish-based food and natural resource companies that are overseas owned or controlled.

The primary focus of the agency is driving export growth, the medium through which other economic impacts such as employment creation are supported. Enterprise Ireland have a network of Irish (11) and International (32) offices which they use to interact with and support their clients.

Exports

	2003	2004	2005	2006	2007	2008
Total Exports	€8.918bn	€9.827bn	€10.977bn	€12.305bn	€13.181bn	TBC. *
Export Gains	€0.83bn	€1.045bn	€1.275bn	€1.699bn	€1.445bn	€1.0bn est. **

* To be confirmed by Annual Business Review (ABR) 2008 due in May 2009

**Estimate on the basis of reported pipeline figures

Enterprise Ireland

		2003	2004	2005	2006	2007	2008	
No. of staff employed		973	958.5	920.5	907.5	892	982(a)	
Salaries	€m	62.3	66.1	65.9	77.3	68.2	71.9	
Exchequer commitment	€m	214.1	216.7	232.2	245.5	264.9	294.6	
Employment created (full time)		13,441	12,564	14,316	15,052	15,776	10,522	
Employment created (part- time)		14,923	14,438	13,711	14,628	14,700	15,095	
New Enterprise supported (b)		61	65	75	76	70(b)	71	
Persons trained (c)		6,320	4,060	5,160	5,920	7,320	5,380	
		1996/02	1997/03	1998/04	1999/05	2000/06	2001/07	
Grant cost per job(d)	€	10,395	9,537	8,518	5,961	3,907(d)	6,111	

(a) Posts transferred from Shannon Development and the creation of a new CEB Unit at the request of the Minister make up the bulk of the increase in staff numbers.

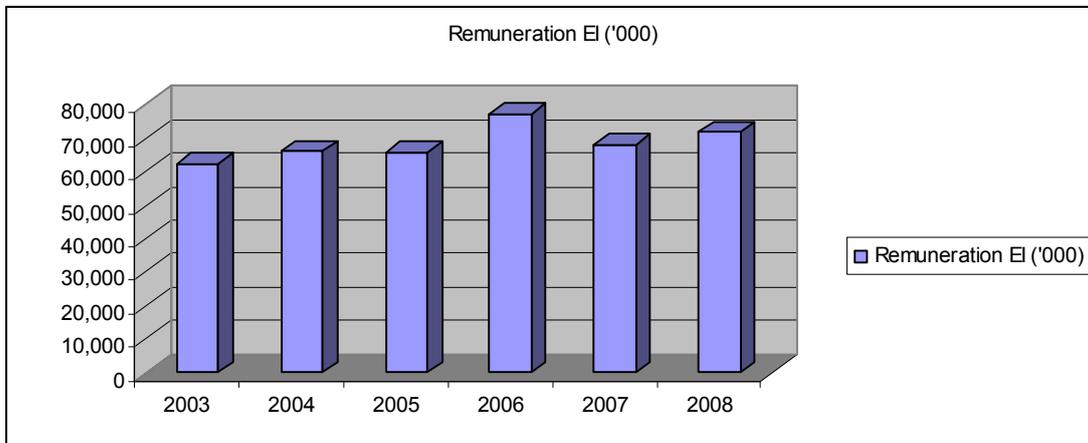
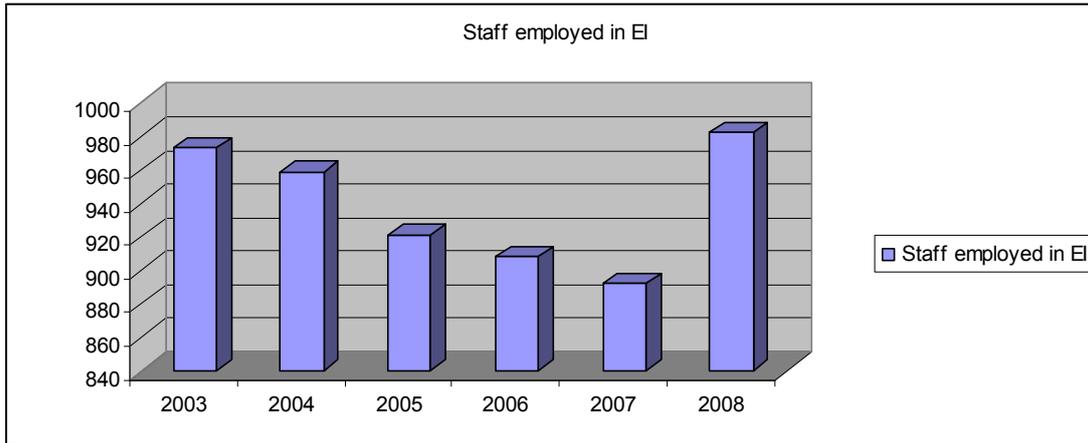
(b) Taken to mean new High Potential Start Ups. The functions of Shannon Development reverted to EI in 2007 – an additional 9 HPSUs were therefore supported, giving a total of 79 in 2007.

(c) Number of companies participating is recorded but multiple attendees from each company is the norm – a conservative estimate of 2 per company is used to calculate above figures.

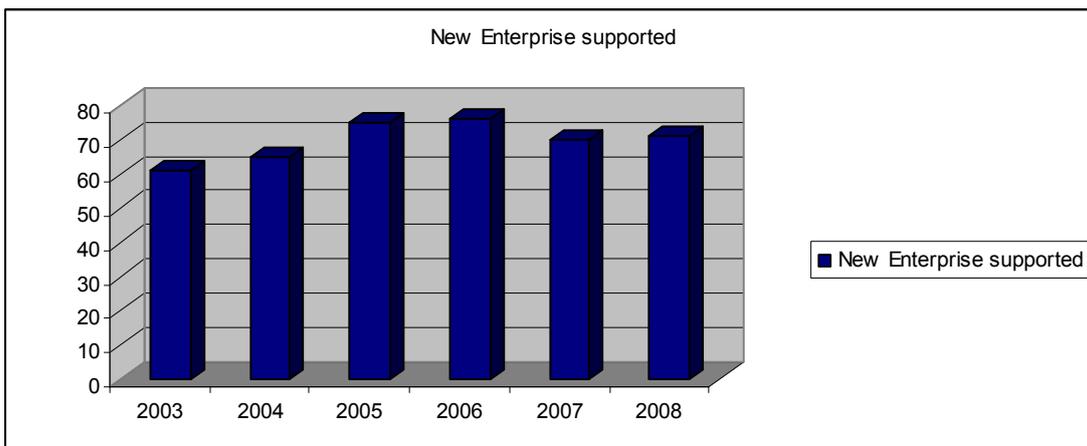
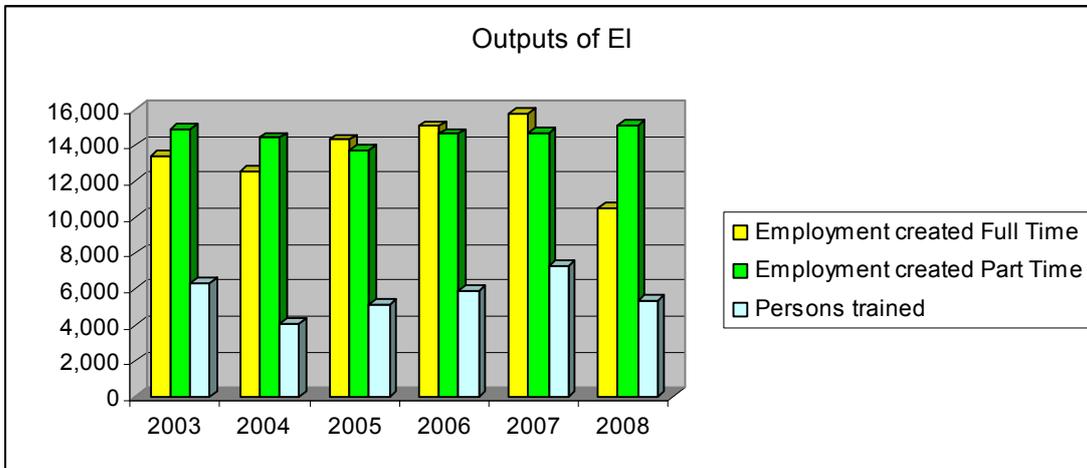
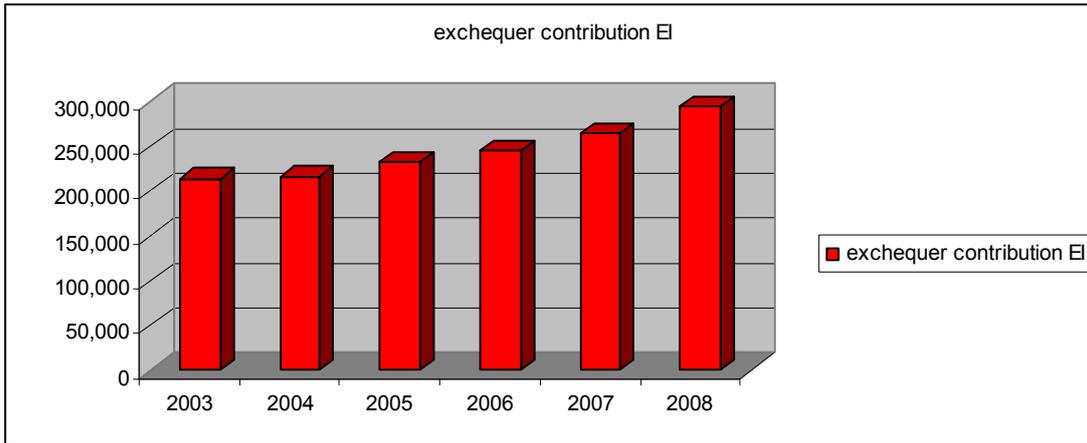
(d) 'Cost per job sustained' is the measure agreed with the DETE and is calculated by taking into account all agency expenditure on all firms in the period. Only jobs created during, and sustained at the end of, each seven-year period are credited in the calculations. There has been a trend decline over the six year period tailing back upwards slightly in 2007. The very low cost per job sustained figure for 2000-2006 is due to the large EI own resource income which accrued in 2000, following divestments in a number of major technology companies.

Trends in Enterprise Ireland.

As can be seen from the tables above numbers employed have increased by 1% between 2003 and 2008. Numbers had dropped to 892 in 2007 (an 8.3% drop from 2003 levels) but have moved upwards again in 2008. This rise was due to staff transferred from Shannon Development and the formation of a new CEB coordination unit. The paybill has increased 15% over the 6 year period.



The Exchequer contribution to Enterprise Ireland has risen almost 38% over the same 6 year period. When this is compared to the output figures of EI over the last number of years it seems high. While full time employment created peaked in 2007 at almost 16,000 jobs, fulltime employment created in 2008 is 22% less that was created in 2003. Part time employment created is up slightly over the 6 year period at just over 1%. No of persons trained which also peaked in 2007 is down 15% in 2008 on 2003 levels. On a more positive note enterprises supported has increased 16% from 2003 to 2008 but has fallen somewhat since a high of 76 in 2006. Given that responsibility for indigenous industry transferred to EI in 2007 from Shannon Development these figures for 2007 and 2008 for jobs created and enterprise supported show a very significant decline particularly in the context of the amount of resources employed by EI.



County & City Enterprise Boards

The role of the CEBs is to provide support for micro-enterprises in the start-up and expansion phases, to promote and develop indigenous micro-enterprise potential and to stimulate economic activity and entrepreneurship at local level. The CEBs deliver a range of tailored programmes and supports in order to fulfil this role. This is a role which has been endorsed in the context of a number of significant policy reviews in recent years including the Enterprise Strategy Group Report and the Report of the Small Business Forum.

The overall priorities for Capital expenditure by the CEBs focuses on the promotion and stimulation of entrepreneurship at local level and the development of sustainable growth-orientated micro-enterprises which, over time, can develop into strong export entities. This is done through the provision of both financial assistance and non-financial assistance. In addition to the above the County and City Enterprise Boards continued to support and assist in developing an environment conducive to maximizing the contribution of the micro-enterprise sector to the economy

The core activities of the CEBs include the following:

- provision of financial interventions to support business development
- creating local enterprise awareness and developing an enterprise culture and community based enterprise activity
- providing a single / first point of contact service to the business community
- providing support to private sector and community initiatives so as to secure the establishment and / or expansion of commercially viable micro enterprise projects
- providing comprehensive pre and post start-up support to new and expanding micro enterprises;
- the provision of business advice counselling and mentoring
- the delivery of management and capability development programmes aimed at improving the skills of owner managers so as to assist the survival rate amongst micro businesses and facilitate future growth

The CEBs can provide both financial and non-financial assistance to a project promoter. The forms of ***financial assistance***, which are available, subject to certain restrictions, include Capital Grants, Employment Grants and Feasibility Study Grants.

The basic criteria under which financial assistance is available is based primarily on factors such as the sector of the economy in which an enterprise is operating or intends to operate and the size, or proposed size, of the enterprise. The enterprise must be in the commercial sphere, must demonstrate a market for the proposed product/service, must have a capacity for growth and new job creation and must not employ more than 10 people. The CEBs give priority to enterprises in the manufacturing or internationally traded services sector and the CEBs must always give consideration to any potential for deadweight and displacement arising from a proposed enterprise.

The following forms of finance are currently available from the CEBs to micro-enterprises;

- **Capital Grants** up to a maximum of 50% of the cost of capital and other investment or €75,000, whichever is the lesser; a portion of the grant in excess of 40% (in the BMW Region) or 35% (in the S&E Region) to be in refundable form.
- **Employment Grants** a grant of up to €7,500 per new job, to a maximum of 10 new jobs.
- **Feasibility Study Grants** up to a maximum of 60% (in the BMW Region) or 50% (in the S&E Region), of the cost of a feasibility study and business plan, subject to an overall limit of €6,350 (in the BMW Region) or €5,100 (in the S&E Region).

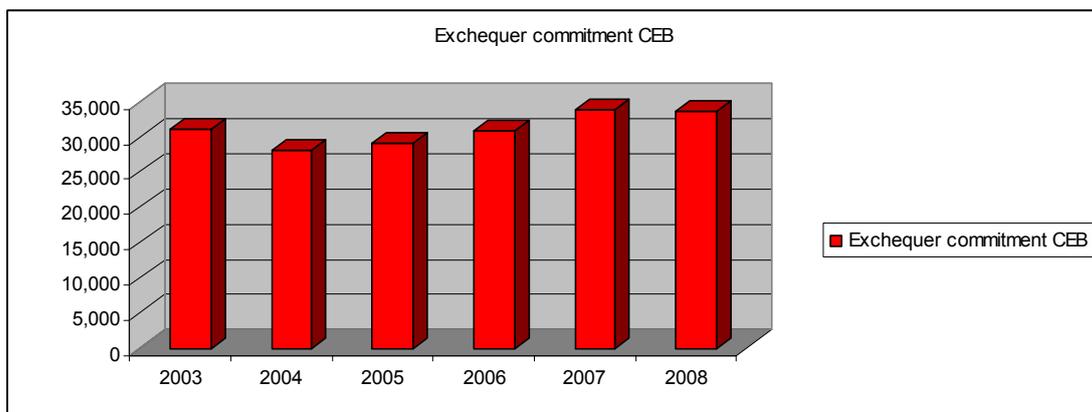
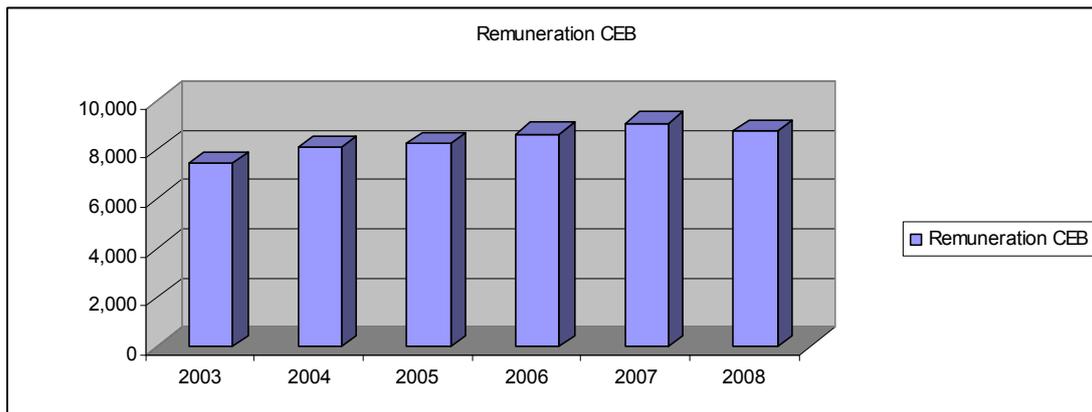
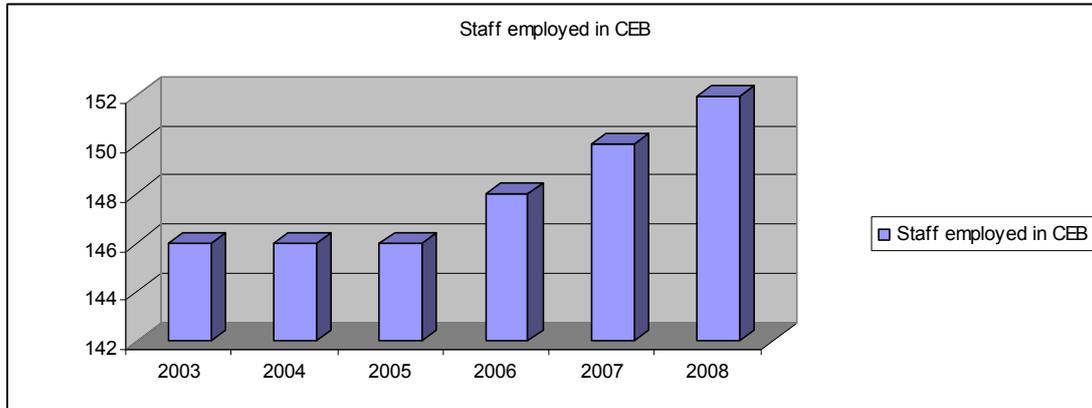
The CEBs are obliged to issue at least 30% of their funding in a refundable form. This requirement is designed to address concerns about deadweight and displacement and also creates a revolving fund, as grants are repaid, that the CEBs can use to aid further projects. There are at least one CEB in each county in Ireland, with 4 in Dublin and Cork, 2 in Waterford, Tipperary and Limerick.

	2003	2004	2005	2006	2007	2008
No. of staff employed	146	146	146	148	150	152
Salaries	€7,643,610	€8,085,630	€8,257,660	€8,647,213	€9,093,877	€8,739,351
Exchequer Commitment i.e. total Current and Capital	€31.1m	€28.05m	€29.1m	€30.8m	€33.9m	€33.6m
Employment created Total Net Full Time	1,459	1,341	1,938	2,047	2,265	1,532
Enterprises supported	991	864	948	894	945	959
Persons trained	For the period 1993 to end 2003 72,987	12,754	17,040	19,867	21,169	21,912
Grant cost per job*						

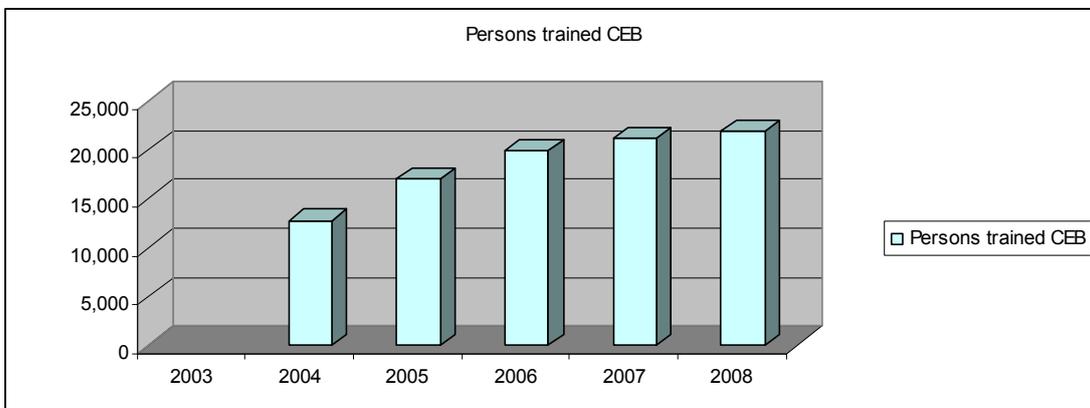
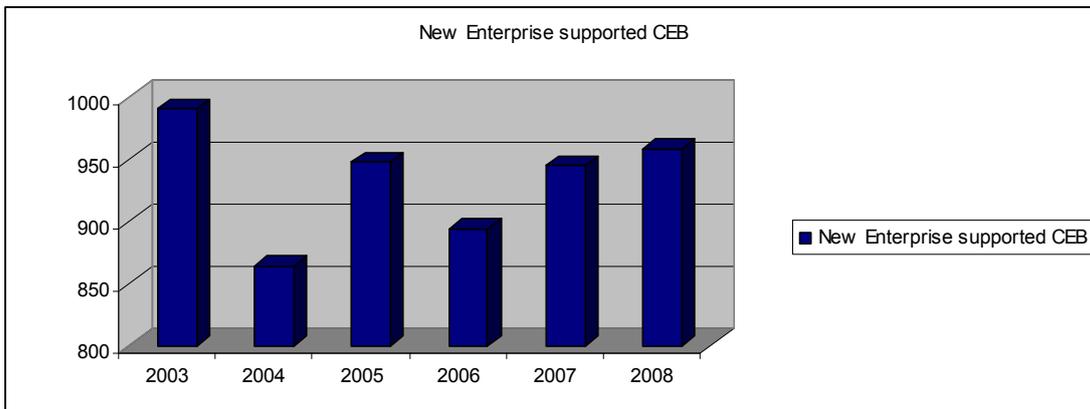
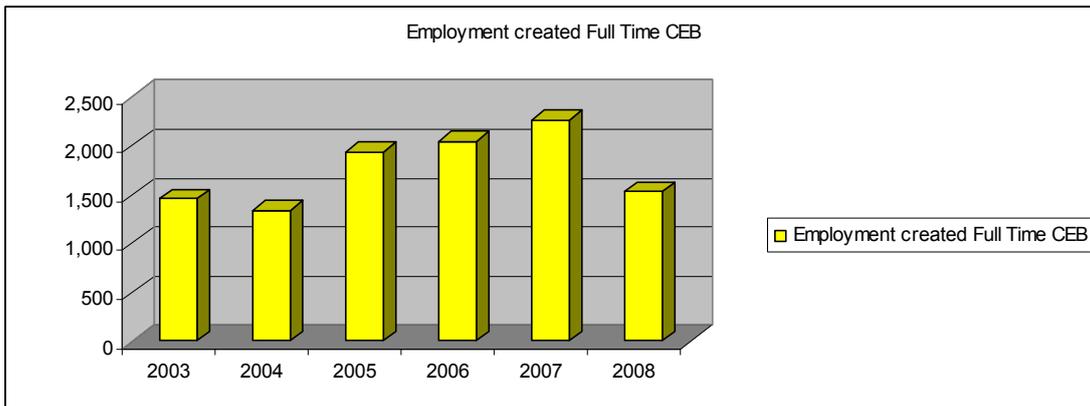
* The estimated average grant cost per job is €5949.00

Trends in County & City Enterprise Boards (CEB's)

Staff employed in CEB's has risen slightly over the 6 year period 2003-2008 by 4% from 146 to 152. Remuneration of staff employed has risen by 17% over the same period and Exchequer commitment has risen by 8%.



Full time employment created has risen by 5% over the same time period from 1,459 jobs in 2003 to 1,532 jobs in 2008. Full time employment created peaked in 2007 over this period with 2,265 jobs created. New Enterprises supported has fallen by 3% over the period with 991 new enterprises supported in 2003 compared to 959 in 2008. Numbers trained by the CEB's has increased substantially by 72% over a five year period 2004 to 2008.



Business Innovation Centres

The Business Innovation Centres which are under the remit of Enterprise Ireland contribute significantly to regional economic development through the provision of a comprehensive range of business supports to the micro enterprise sector, including the provision of business information, advice, counselling and mentoring. BICs receive approximately 40% of their funding through Enterprise Ireland and the remainder is self generated. They are also involved in the development and management of enterprise space and the promotion of an enterprise culture. There are 4 business innovation centres in Ireland, Dublin Business Innovation centre, Cork business innovation centre, south East Business innovation centre and West business Innovation centre.

Business innovation centres provide business advice and assistance in:

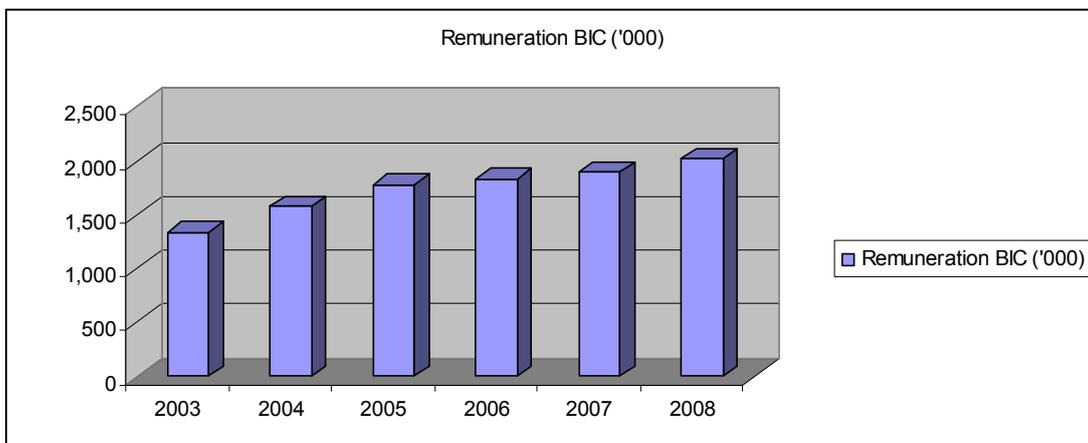
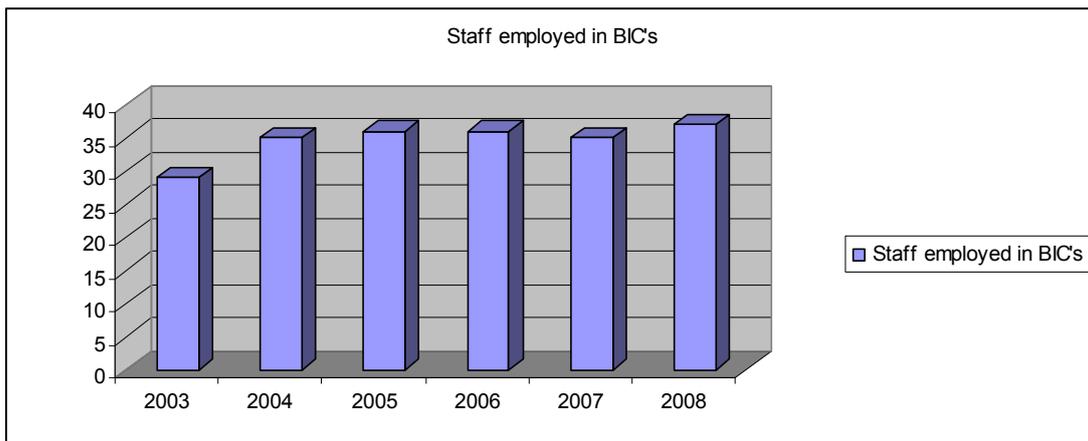
- Developing a business idea
- Starting a business
- Expanding existing business
- seeking access to finance
- seeking office space

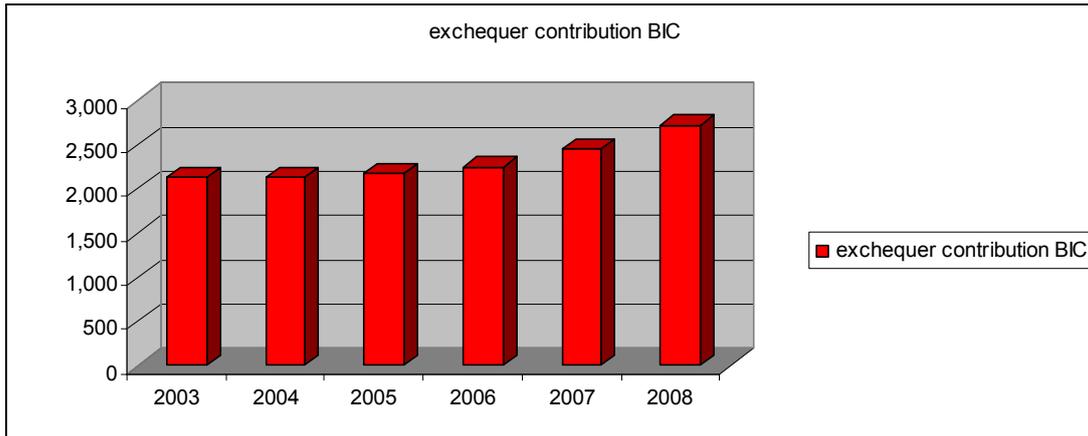
		2003	2004	2005	2006	2007	2008
No. of staff employed		29	35	36	36	35	37
Salaries	€	1,339,000	1,577,000	1,784,000	1,833,000	1,894,000	2,018,000
Exchequer commitment	€	2,137,000	2,137,000	2,182,000	2,249,000	2,460,000	2,722,000
Employment created (full time)		n/a ²⁴	n/a	n/a	n/a	n/a	n/a
Employment created (part-time)		n/a	n/a	n/a	n/a	n/a	n/a
New Enterprise supported (Start Ups)		372	494	433	402	386	Not available
Persons trained		210	238	168	195	247	510
Grant cost per job		n/a	n/a	n/a	n/a	n/a	n/a

²⁴ N/A refers to not applicable

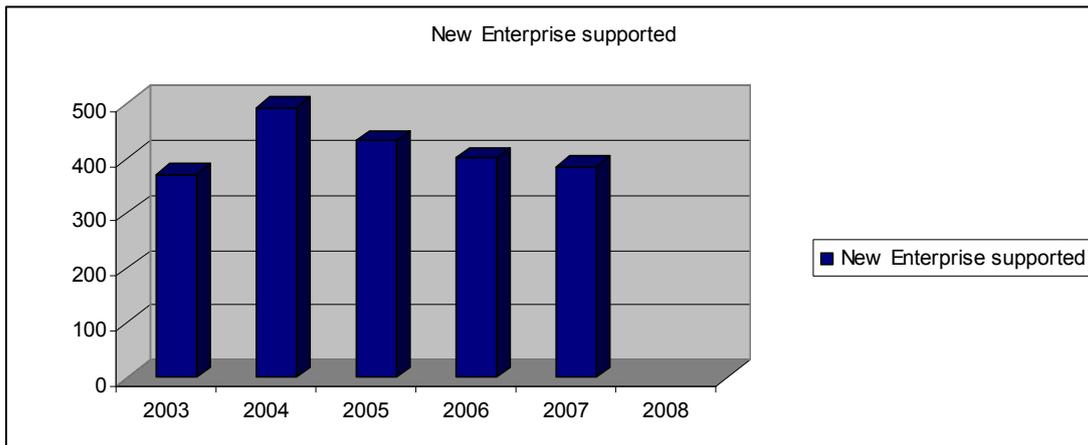
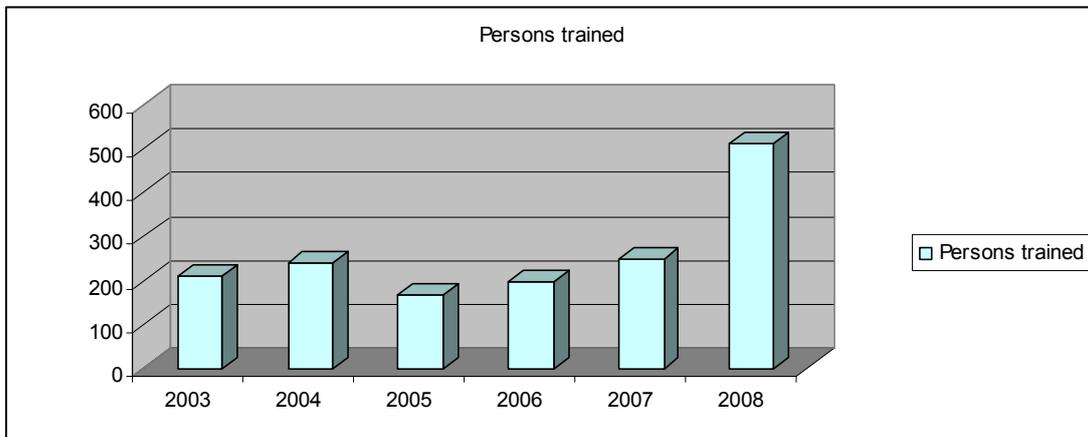
Trends in Business Innovation Centers.

From the graphs below it can be seen that numbers employed in Business Innovation Centres (BIC's) has increased by 28% from 29 in 2003 to 37 in 2008. In that same period the corresponding paybill has increased by almost 51% and the Exchequer contribution has increased by 27%.





Persons trained has remained fairly constant between 2003 and 2007 ranging from 168 to 247 persons trained annually. This number jumped to 510 to 2008 which is over 200% of the number trained in 2003.



Shannon Development

Shannon Development is a government owned regional development company dedicated to promoting and developing the Shannon Region of Ireland. Shannon Development is based in Shannon with regional offices in Clare, North Kerry, Limerick, South Offaly and North Tipperary.

Shannon Development's mission is to 'Imagine and deliver a bright future for people, investors and visitors in the Shannon Region, and in doing so to fuel Ireland's future economic growth by delivering a world class region in the Atlantic Corridor.' This mission is focused on three key goals that will help achieve the Company's vision for the Region:

- Ensure that the **more developed areas** of the Shannon Region are enhanced to realise their full development.
- Ensure that the potential of the **less developed areas** of the Shannon Region is realised.
- Create demand for **Shannon International Airport**.

Shannon Development has responsibility for attraction of FDI to the Shannon Free Zone (SFZ) and management of a property portfolio and provision of property solutions for FDI and indigenous industry in the mid-west region generally. It receives Exchequer funding in respect of grants to industry in the SFZ. All its other industrial development activities and its Pay and administration costs are met from its own resource income. It also has functions in relation to tourism product development and marketing which is part funded by the Exchequer through the Department of Arts, Sport and Tourism. Up to 2007 Shannon Development was also responsible for developing and strengthening the indigenous industry sector in the Shannon region; this function was transferred to EI in 2007.

The main activities of Shannon Development include:

- Continuing to develop and manage the Shannon Free Zone as a world class location for indigenous and international investment in manufacturing and internationally traded services;
- Developing and managing the Company's property portfolio in a commercially focused manner, as an economic development tool which helps achieve balanced regional development throughout the Shannon Region.
- Developing the Shannon Development Knowledge Network - a network of leading edge technology business locations with direct linkages to third level educational

institutions. The network includes the National Technology Park in Limerick, Kerry Technology Park in Tralee, Tipperary Technology Park in Thurles, BIRR Technology Centre in Offaly, and Information Age Park Ennis in Clare;

- Developing new tourism marketing programmes, new tourism products and visitor information services in the Shannon Region, in conjunction with the Industry, to proactively respond to many challenges facing Irish Tourism;
- Leading and encouraging regional development at urban and rural levels to ensure economic inclusion and balanced spatial development;
- Developing commercial tourism businesses, e.g. castle banquets and day-visitor attractions, through a wholly owned subsidiary company – Shannon Castle Banquets & Heritage.

Shannon Development:

		2003 €'000	2004 €'000	2005 €'000	2006 €'000	2007 €'000	2008 €'000
1	No. of staff employed (See Notes A and C)	177.5	174.5	157	147	130	129.5
2	Salaries (Total Spend per Year) (See Note B)	12,621	13,221	13,088	12,654	11,532	12,532
3	Exchequer commitment – DETE E2 Subhead – Estimate – Outturn	3,500 2,780	2,500 1,044	3,500 474	3,300 2,684	3,000 892	3,000 1,289
4	Employment SFZ created (full time) Indig. (See Note E)	7,306 12,448 <u>19,754</u>	7472 12,267 <u>19,739</u>	7,207 12,061 <u>19,268</u>	7,188 13,342 <u>20,530</u>	7047 -----	7107 -----
5	Employment created (part-time) (See Note D)						
6	New Enterprise supported (See Note F)	173	63	60	41	4	3
7	Persons trained	N/A	N/A	N/A	N/A	N/A	N/A
8	Grant cost per job Indigenous Shannon Free Zone	11,415 20,257	10,745 17,003	8,559 15,192	7,396 12,380	N/A 10,285	Not yet available for 2008

Notes in relation to Shannon Development Table above:

Note A: The number of staff employed in the core Shannon Development Company is as at the 31st December of each year.
The total direct and indirect staff employed in Shannon Free Zone activities from 2006-2008 was 10, 13 & 13 respectively.

Note B: Staff Costs disclosed are gross staff costs for the Company. It includes staff costs associated with staff who were employed by the Company at any stage throughout the year. The figures do not include VER/VS costs.

Note C

The staff number in the Annual Reports of Shannon Free Airport Development Company Ltd is the consolidated total number of employees for the core Shannon Free Airport Development Company Ltd plus the subsidiary companies Killrush Creek Marina Ltd and Shannon Castle Banquets and Heritage Ltd in each respective year as follows: 2003 – 396; 2004 – 390; 2005 -375; 2006 -372; 2007 – 344.

These figure include the number of whole time staff, plus the number of seasonal staff converted to full time equivalents, employed by the whole group in each year.

Note D

Shannon Development reports employment created on full time positions and full time equivalents (FTEs) – i.e. contracts of duration greater than nine months.

Note E

In accordance with its new mandate Shannon Development’s responsibility for indigenous industry has transferred to Enterprise Ireland in 2007.

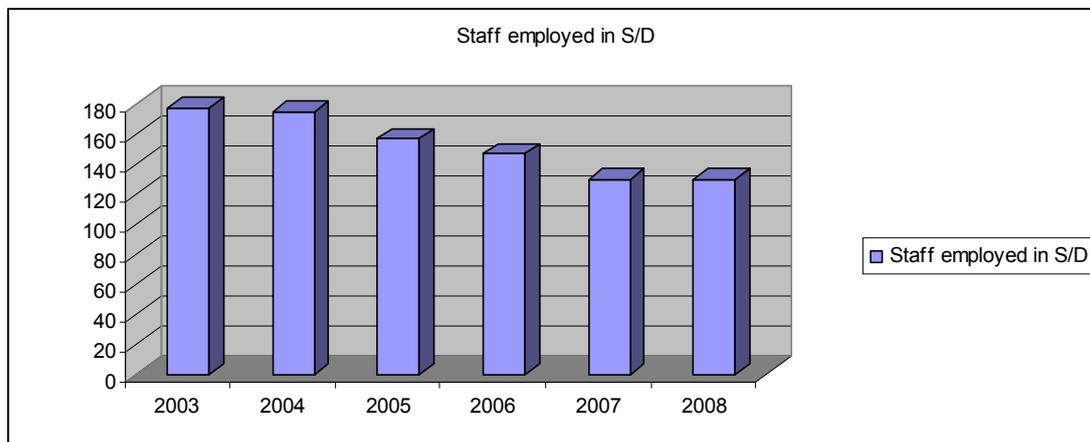
Note F

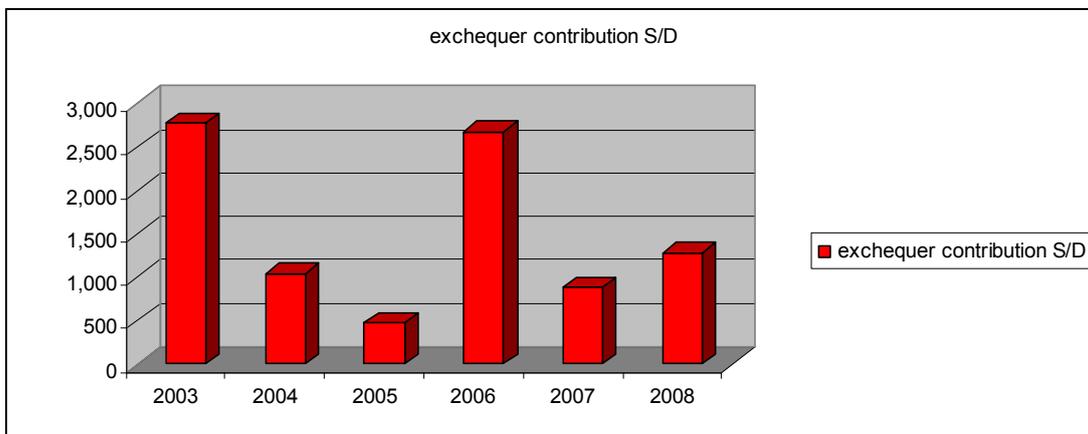
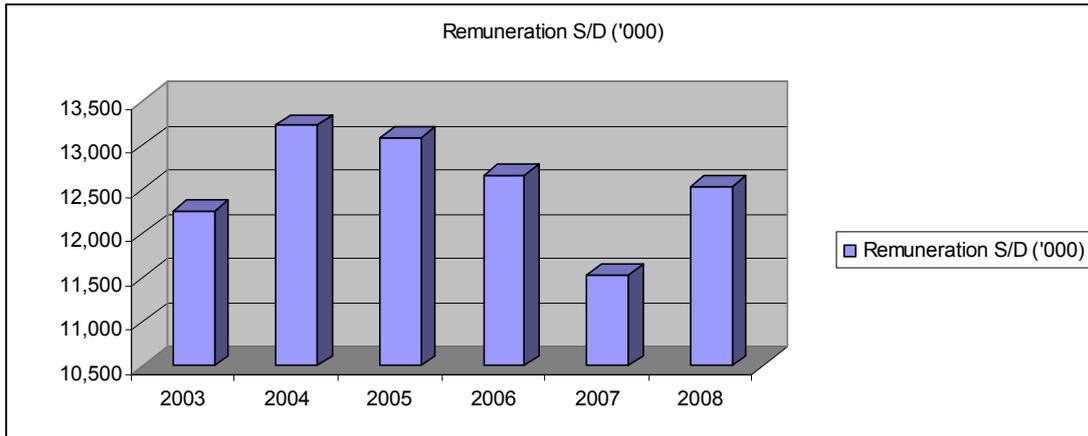
Year 2003 used as base and related to number of Companies who received grant payments. Subsequent years include those additional companies grant aided.

2007 & 2008 figures relate to new companies supported on Shannon Free Zone.

Trends in Shannon Development

As can be seen from the graphs below staff numbers have decrease by 27% over the 6 year period 2003 to 2008. Some of this decrease is accounted for by the transfer of some Shannon Development staff to Enterprise Ireland when Shannon Development’s responsibility for indigenous industry transferred to EI in 2007. Consequently Shannon Developments paybill has only risen 2% from 2003 to 2008. The Exchequer contribution received has fallen almost 54% over the 6 year period.





Numbers for employment created and new Enterprises supported have also fallen dramatically in particular towards the latter stages of the 6 year period. Again this can be in some way explained by the transfer of responsibility for indigenous industry from Shannon Development to EI in 2007. As can be seen from table above the 7,047 and 7,107 jobs created in 2007 and 2008 were solely attributable to Shannon Free Zone. This also applies to the 4 and 3 new enterprises supported in those years. Unusually there is no corresponding rise (or the rise in the figures in these 2 categories is vary modest) for these years 2007 & 2008 for EI. Given that in previous years there was in the region of 12,000 to 13,000 jobs created in the indigenous sector in Shannon development, further explanation should be provided by the relevant Department on this issue.

Forfas

Forfás is the national policy and advisory board for enterprise, trade, science, technology and innovation. It is the body in which the State's legal powers for industrial promotion and technological development have been vested. It is also the body through which powers are delegated to Enterprise Ireland for the promotion of indigenous industry and to IDA Ireland for the promotion of inward investment. Science Foundation Ireland was established as a third agency of Forfás in July 2003. The broad functions of Forfás are to:

- advise the Minister on matters relating to the development of industry in the State;
- advise on the development and coordination of policy for Enterprise Ireland, IDA Ireland, Science Foundation Ireland and such other bodies (established or under statute) as the Minister may by order designate. (Note: In 1996 Fás was also designated by the Minister as a body under this provision of legislation).
- encourage the development of industry, science and technology, innovation, marketing and human resources in the State;
- encourage the establishment and development in the State of industrial undertakings from outside the State; and
- advise and coordinate Enterprise Ireland, IDA Ireland and Science Foundation Ireland in relation to their functions.

While all of Forfás's work is provided for under Statute, its work plans are determined in consultation with the Department of Enterprise, Trade and Employment (DETE). This includes areas identified by other Government Departments, the development agencies and enterprise stakeholders of interest to DETE where the issues impact on enterprise and science and innovation performance. This allows the Department to offer robust, high quality policy advice to the Minister and have the capacity to influence thinking and policies of other Departments and the political system generally. It makes a strong contribution to developing policy on a cross-Departmental basis, an aspect strongly advocated under the Strategic Management Initiative.

Forfás also provides a shared research resource for a range of policy bodies and councils for the Department, including the National Competitiveness Council, the Expert Group on Future Skills Needs, Management Development Council, the Science Enterprise Feedback Group and the Advisory Science Council.

In addition to the Research, & Studies and Surveys activity necessary to underpin its main statutory functions above, Forfás also carries out the following activities:

- **Payment of Pensions** for retired staff of the Agencies and preceding organisations (approx 1,000 pensioners, 500 deferred benefits and 1,500 active members) with corresponding pensions budget of **€21.2 Million** in 2009. This is a statutory function under Forfás's establishing legislation.

- **Accreditation Services**, delivered to international standards, involving the accreditation of laboratories, certification bodies, etc. Forfás's work in this important and growing area of activity for enterprises is overseen by a committee of Forfás, the Irish National Accreditation Board (INAB), comprised of people with relevant experience in this area, who give their time on a voluntary basis. The issue of whether this Committee requires to be given a Statutory basis has recently been raised.
- Managing, on behalf of the Department of Enterprise, Trade and Employment, the **Discover Science and Engineering Awareness Programme** and related budget of **€5.28 Million** in 2009.
- Provision of **Centralised/Coordinated Services to the Agencies** in areas where the Agencies have agreed that the activities are most efficiently and effectively handled centrally by Forfás. These include messengers, reception/telephonist services, broad range of facilities management services, pension scheme management and advice, related staff benefit/ insurance schemes, coordination of certain HR/IR activities flowing from Forfás statutory obligation as employer of staff across the Agencies, procurement of general insurances for the Agencies (including the National Standards Authority of Ireland and Sustainable Energy Ireland), coordination of VAT returns and the Revenue on Line (ROS) system and payroll and other payment services to Science Foundation Ireland.
- **Property and Lease Management** of buildings, which had previously been leased by the former Industrial Development Authority (Carrisbrook House and Knockmaun House).

Forfás

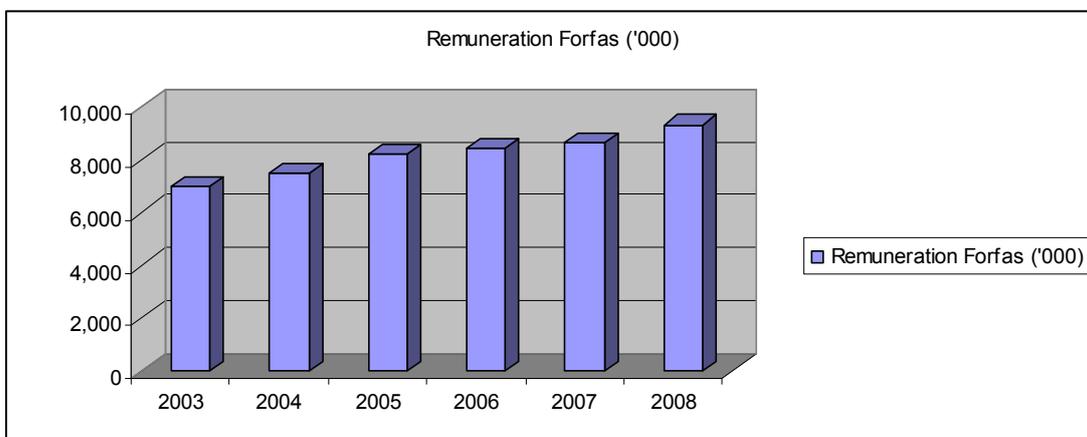
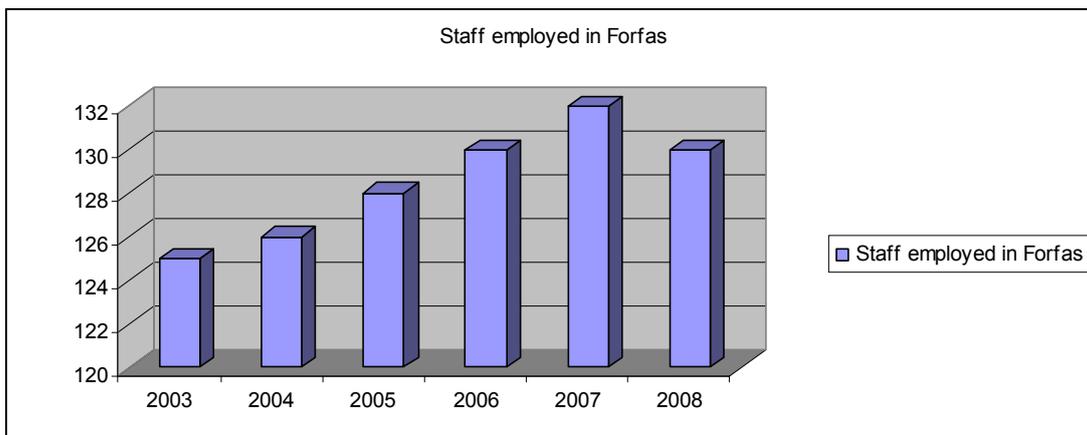
	2003	2004	2005	2006	2007	2008
No. of staff employed	125	126	128	130	132	130
- Permanent Positions	117	115	117	117	117	115
- Contract Positions*	8	11	11	13	15	15
Note: Staff Numbers for 2002: Permanent: 119 Contract 8						
No of Pensioners in Payment	776	820	844	871	958	971
Salaries & Pensions						
- Staff Pay (Euro 000)	7,004	7,506	8,203	8,434	8,661	9,324
- Pensions in Payment (Euro 000)	8,730	10,040	14,079	14,981	17,392	19,557
Exchequer Commitment						
Salaries & Pensions	15,734	17,546	22,282	23,415	26,053	28,881
Non-Pay	4,531	4,849	5,294	6,766	6,604	7,152
Allocation Outturn	20,265	22,395	27,576	30,181	32,657	36,033
Allocation Voted (B.1)	21,115	22,825	27,976	31,031	34,407	37,835
Employment created(full time)	See relevant data re EI, IDA, Shannon Development, CEBs and Fás					

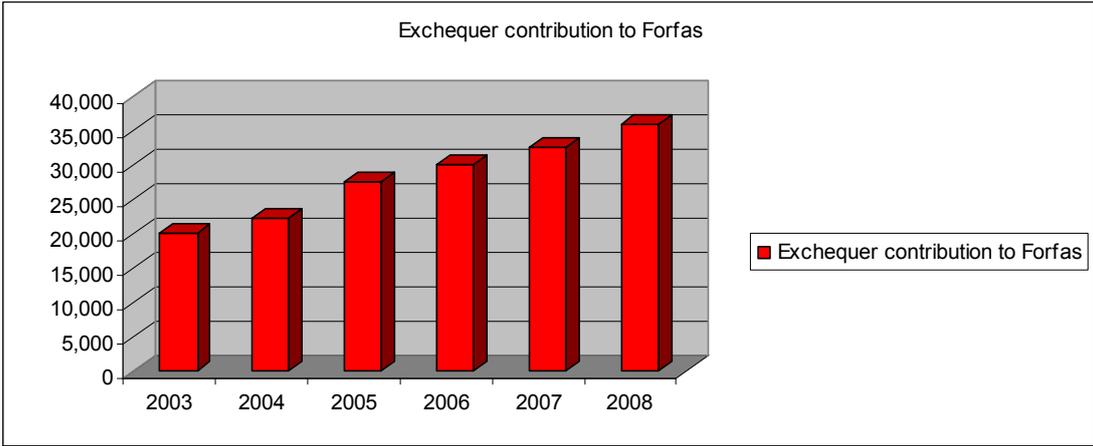
Employment created(part- time)	See relevant data re EI, IDA, Shannon Development, CEBs and Fás
New Enterprise supported	See relevant data re EI, IDA, Shannon Development, CEBs and Fás
Persons trained	See relevant data re EI, IDA, Shannon Development, CEBs and Fás
Grant cost per job	See relevant data re EI, IDA, Shannon Development, CEBs and Fás

* These posts were funded by an increase in own resource income arising from laboratory accreditation.

Trends in Forfas

Staff numbers in Forfas have risen by 4% over the 6 year period 2003 to 2008. In the same period the paybill has risen 33%. There are a number of contract positions which are funded by an increase in Forfas income arising from laboratory accreditation. Exchequer funding has increased a lot more over the same time period, increasing from €21.1m in 2003 to €37.8m in 2008, an increase of almost 78%. As Forfas predominantly fulfils a policy making and advisory role no figures are available in relation to outputs such as jobs created, enterprises supported etc. It is through their role at this relatively high level that they contribute to enterprise support and development in Ireland.





Inter Trade Ireland

InterTradeIreland is one of the North/South Implementation Bodies established under the Belfast Agreement (the ‘Good Friday Agreement’) in 1998. Its statutory functions are set down in the British-Irish Agreement Act, 1999 and it has the following remit: "to exchange information and co-ordinate work on *trade, business development and related matters* in areas where the two administrations specifically agree it would be in their mutual interest".

InterTradeIreland operates from a single base in Newry, Co. Down and it is jointly funded in a 2:1 ratio, respectively, by the Department of Enterprise Trade and Employment and the Department of Enterprise, Trade and Investment in Northern Ireland. Its total budget from both Departments for 2009 is €14.2 million and it has a staff complement of 42.

In its current Corporate Plan, 2008-2010, InterTradeIreland has taken as its core theme the optimal utilisation of economic resources through co-operative North/South initiatives to drive additional trade and wealth creation. InterTradeIreland’s value proposition for the business community is to deliver benefits in the key areas of competitive advantage – science, technology and innovation, and sales and marketing. All of InterTradeIreland’s initiatives are informed by targeted business and economic policy research and development.

In the area of Science Technology and Innovation, InterTradeIreland provides all-island programmes such as FUSION Technology Transfer, INNOVA Collaborative Research & Development, EQUITYNETWORK Equity Finance, and Business Networks for the Software and Polymer & Plastics sectors. In the area of cross-border Sales & Marketing, InterTradeIreland provides programmes such as ACUMEN All Island Marketing the Go-2-Tender Public Procurement, and Network & Get work Buyer-Supplier.

InterTradeIreland

	2003	2004	2005	2006	2007	2008
No. of staff employed ¹	41	42	41	41	41	41
Salaries ²	1,287,354	1,386,951	1,288,044	1,370,177	1,537,160	1,450,153
Exchequer commitment ²	6,188,820	7,126,871	7,915,596	9,663,811	9,477,845	7,735,389
Employment created(full time) ³	-	-	65	72	135	120
Employment created(part- time)	N/A	N/A	N/A	N/A	N/A	N/A
New Enterprise supported ⁴	N/A	N/A	437	347	493	536
Persons trained ⁵	N/A	N/A	N/A	N/A	N/A	N/A
Grant cost per job ⁶	N/A ²⁵	N/A	N/A	N/A	N/A	N/A

²⁵ N/A refers to not applicable

Notes.

1. Average monthly FTE.
2. These amounts represent the DETE two-thirds funding in Euro. The other one-third funding is provided by DETI in Northern Ireland.
3. The *Employment Created* figures given above reflect monitoring information provided by companies participating on InterTradelreland programmes, although in the period 2003-2007 job creation was not a specific target for the organisation. The 2008 figure of 120 is subject to final verification.
4. The *New Enterprise Supported* figure shown represents the peak number of companies participating directly on InterTradelreland's co-operative North/South business programmes in the years shown. Prior to 2005 this was not a separate performance target.
5. InterTradelreland does not provide training services to businesses within its portfolio.
6. InterTradelreland is not a grant-based organisation.

Inter Trade Ireland offers support through;

1. Programmes

Inter Trade Ireland programmes offer companies practical advice and support in targeting new cross-border business opportunities, sharing expertise to develop new products and processes, and advising high growth companies on attracting equity investment.

2. Research

Inter Trade Ireland research identifies barriers which prevent companies doing business across the island and restricts their growth. It identifies solutions to obstacles in areas like infrastructure, planning, transport, energy, skills, regulatory and fiscal issues and makes recommendations to Government on how they can be overcome.

3. Business Networks

Inter Trade Ireland brings together networks of companies to help them to become more profitable and competitive through joint marketing, skill-sharing, product or process development, meeting supply needs or co-production opportunities.

4. Financial Assistance Scheme

Inter Trade Ireland supports viable business initiatives/projects in cases where the promoter has neither the necessary financial resources to advance the project nor access to same from other sources but where the project offers a credible contribution to the achievement of Inter Trade Ireland objectives.

InterTradeIreland 2003-2007 Performance Summary.

In the period 2003-2007 InterTradeIreland has provided advice and information to more than **14,000 companies**.

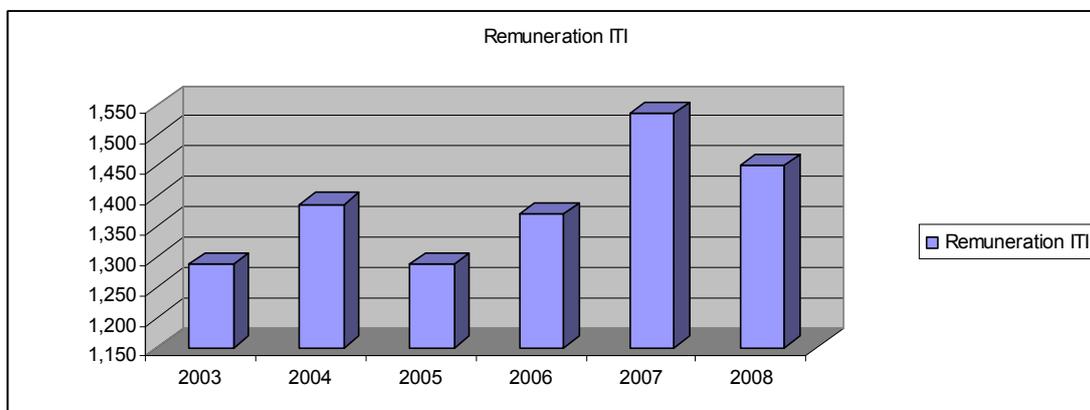
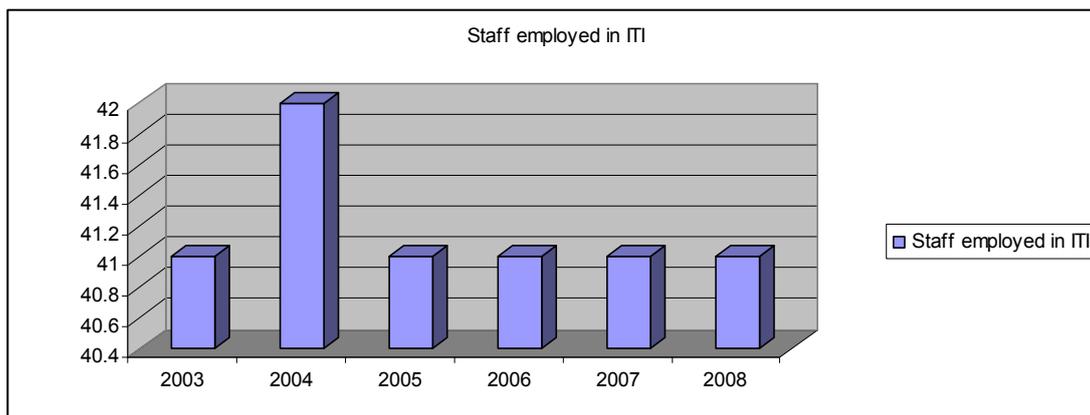
More than 1300 companies - drawn from every city and county in Ireland and Northern Ireland - have directly participated on its programmes generating more than **€200M worth of business value** and creating **more than 270 jobs** to date, with additional value and jobs being reported as ongoing projects are completed.

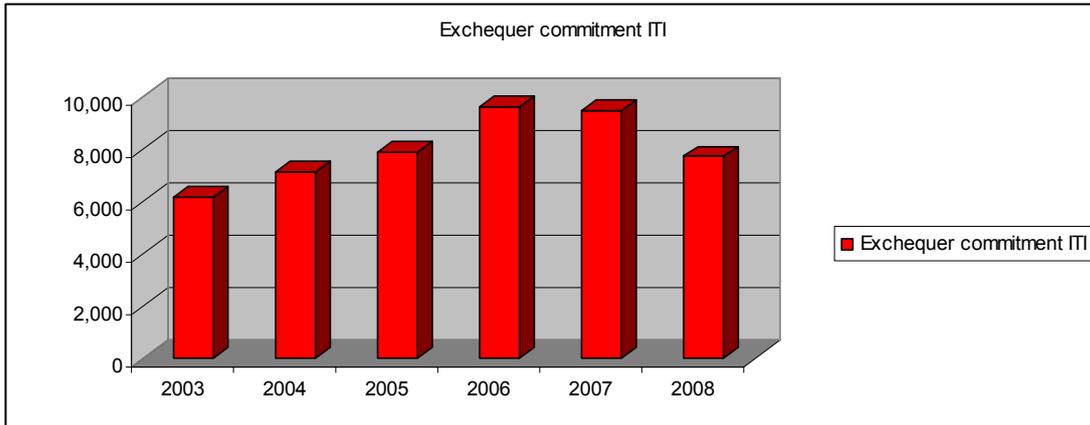
Of those 1300 companies, more than 200 are first time exporters, and more than 200 have embarked on their first formal product development innovation projects with third-level institutes.

More than 30 business and economic research reports have been published by InterTradeIreland, most recently a Mapping Study of Research & Technological Development Centres on the island of Ireland, Environmental Goods and Services Sector on the island of Ireland, and a Competitive Analysis of the Polymer & Plastics Sector.

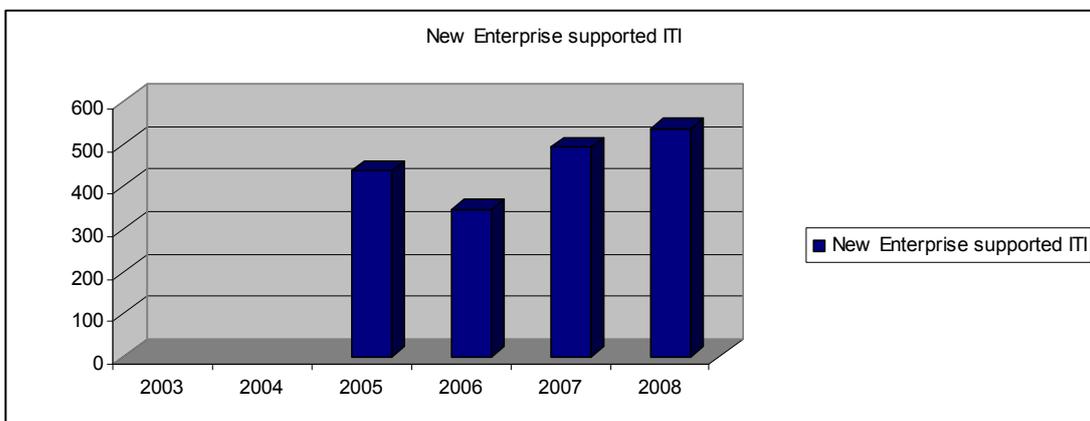
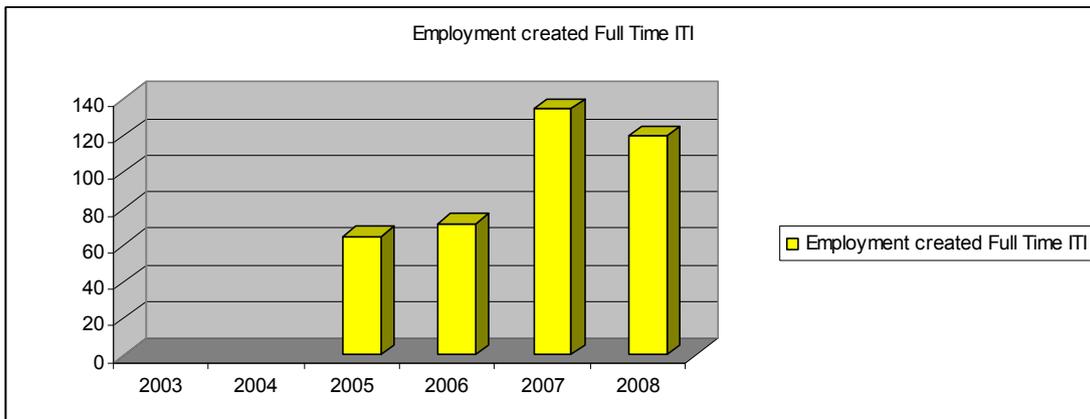
Trends in Inter Trade Ireland

Staff employed in Inter Trade Ireland has remained reasonably constant over the 6 year period 2003 – 2008 at 41 only rising to 42 in 2004. Remuneration has increase by 13% over the same period. The exchequer commitment has risen by 13% over the same time period. As mentioned earlier these amounts represent the DETE two-thirds funding in Euro. The other one-third funding is provided by DETI in Northern Ireland.





Trends in employment created and new enterprises supported are for the time period 2005 to 2008 as these were not specific targets of Inter Trade Ireland prior to 2005 and therefore data was not recorded in relation to them. Employment created has increased by 84 % and new enterprise supported has increased by 23%. There is a fear that an element of double counting occurs when compiling outputs for some of these agencies. Inter trade Ireland records companies participating in Inter Trade Ireland Programmes as new enterprise supported; these may also be recorded as new enterprise supported by some of the other agencies who are also contributing to the support of new enterprise.



Údarás na Gaeltachta

Údarás na Gaeltachta is the regional authority responsible for the economic, social and cultural development of the Gaeltacht. The overall objective of Údarás na Gaeltachta is to ensure Irish remains the main language of the region and is passed on to future generations. A governing board of 20 members, 17 of whom are democratically elected by the community, and a staff of 113 people implement the agency's development brief.

Economic mission

Údarás encourages investment in the Gaeltacht through a range of generous incentives for new enterprises and through support and assistance for existing businesses.

The organisation supports businesses in developing new markets, technologies, products and strategic alliances through research and development. Gaeltacht companies span a range of commercial sectors, including tourism, fish processing and aquaculture, renewable energy, food, life sciences, ICT, niche manufacturing, audio visual and digital media, arts and crafts.

Over 12,000 people are employed in Údarás na Gaeltachta client companies. Údarás aims to increase this number by enabling people living in the Gaeltacht to develop their skills and expertise. Údarás offers extensive programmes of training and education for groups, private individuals and companies. The figures in the table below have been extracted from annual reports and an exercise carried out by the relevant Vote section in the Department of Finance. No figures were made available by Údarás in relation to outputs.

	2003	2004	2005	2006	2007	2008		
No. of staff employed	116	113	107	113	112	113 (e)		
Salaries	7,268	7,926	7,993	8,455	8,981			
Employment created(full time)	7,346	7,507	7,658	7,953	8,026			
Employment created(part-time)	4,220	4,470	4,525	4,380	4,006			
Grant cost per job					10,883			
Exchequer commitment				42,776	39,369	17,850 (e)		

Western Development Commission

The Western Development Commission (WDC) is a statutory body promoting economic and social development in counties Donegal, Sligo, Leitrim, Roscommon, Mayo, Galway and Clare.

The WDC is involved in policy analysis and development, the promotion of regional initiatives and the operation of the WDC Investment Fund.

- To foster and promote job creation and the transfer of skills to the Western Region.
- Improve the economic and social life of the Western Region by highlighting and supporting opportunities for improvements in regional infrastructure.
- To stimulate the creation of a quality business and community based enterprise environment across the Western Region.
- To create vibrant and sustainable enterprise in the rural areas of the Western Region
- To manage the WDC investment fund, a multi-million euro evergreen fund which provides risk capital (equity & loans) on a commercial basis to business and community projects in the Western region.

The WDC Investment Fund fulfils a distinctive role in funding businesses, community initiatives and ‘flagship’ projects in the Western Region. It invests directly in sustainable projects, many of which may be experiencing a funding gap. The WDC seeks a financial return on its investments, together with a social dividend such as enhancing quality of life and the provision of employment.

Operated by the WDC, the unique €34 million exchequer-supported fund aims to provide seed and venture capital or loans to projects under two sub-funds:

- Business Investment Fund
- Local Investment Fund

Investments are made on a commercial basis by way of ordinary share capital, preference share capital, and loans, or a combination of these mechanisms. The WDC does not provide grant aid.

Western Development Commission

WDC			2003	2004	2005	2006	2007	2008	
No. of staff employed			15	15	16	17	18	16	
Salaries ('000)			731	831	845	886	977	1,015	
Exchequer commitment			4,898	5,519	6,079	8,241	5,863	6,520	
Employment created(full time)									
Employment created(part- time)									
New Enterprise supported									
Persons trained									
Grant cost per job									

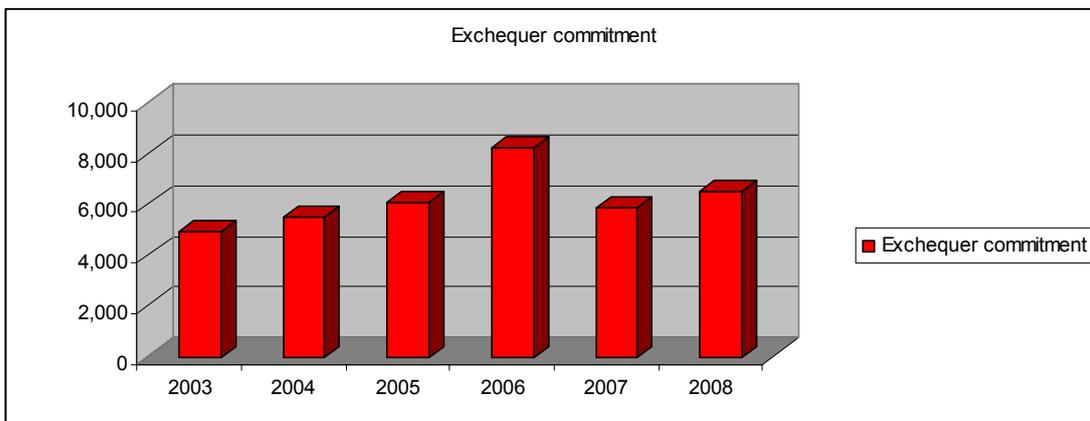
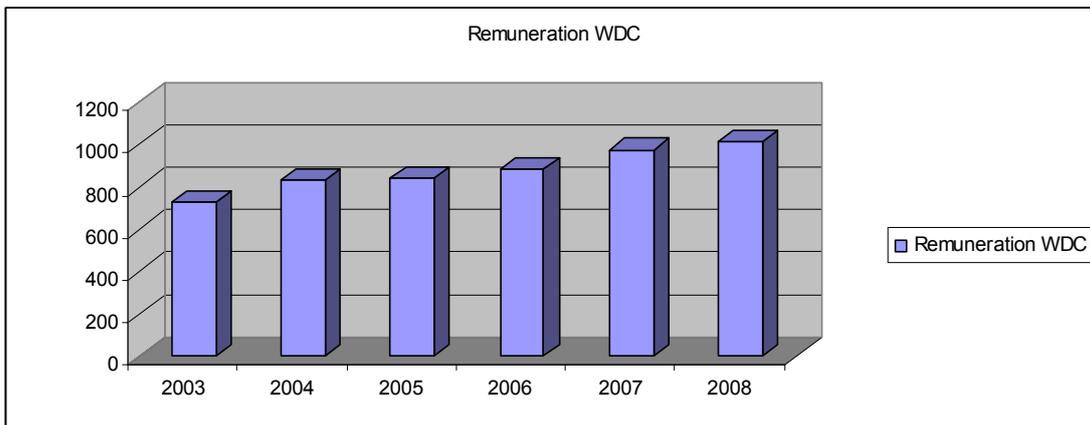
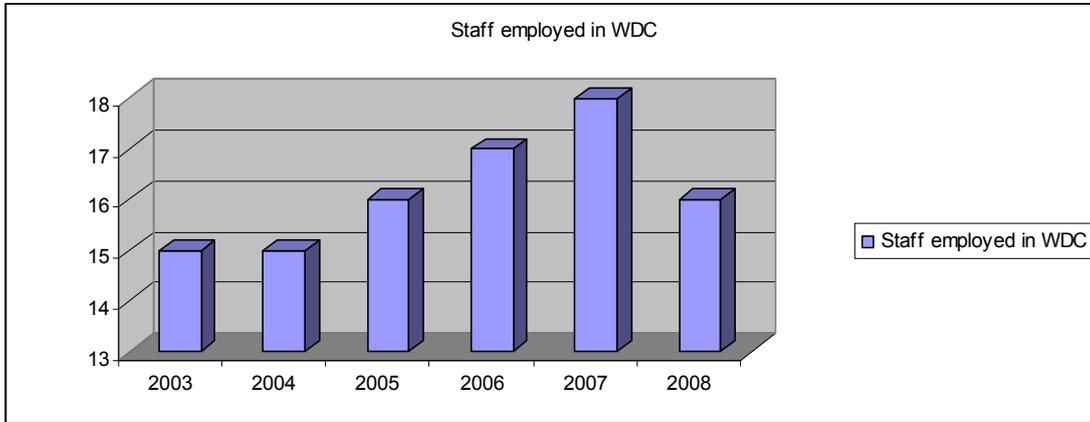
Western Investment Fund (extracted from WDC table above)

Western Investment Fund			2003	2004	2005	2006	2007	2008	
No. of staff employed			4	4	4	4	6	5	
Salaries ('000)			171	194	185	208	306	279	
Exchequer commitment			3,513	3,956	4,323	6,062	3,406	4,000	
Employment created(FTE)			290	176	32	101	42	185	
Employment created(part- time)									
New Enterprise supported			20	14	5	9	5	5	
Persons trained									
Grant cost per job			5,525	5,525	5,525	5,525	5,525	5,525	

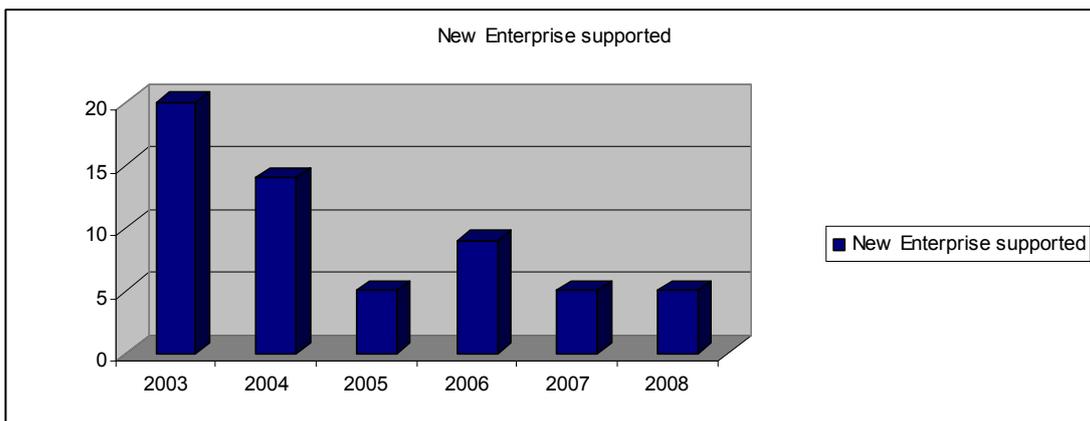
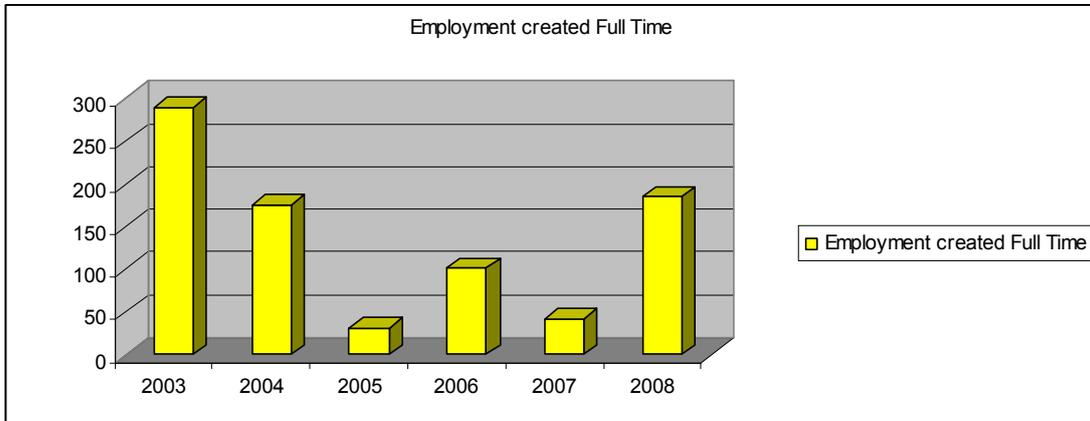
Trends in Western Development Commission

The Western Development Commission (WDC) is a statutory body promoting economic and social development. The Western Investment Fund exists within the WDC and supports new business and creates employment by funding and investing in enterprise.

Staff employed in the WDC has risen to 16 in 2008 from a figure of 15 in 2003 with various fluctuations over that period. Remuneration has grown steadily over the same period from €0.7m in 2003 to just over €1m in 2008, an increase of 39%. The exchequer commitment has also risen by 33% in 2008 on 2003 levels having peaked in 2006 at €8.2m.



Full time employment created via WDC has fallen by 36% from 2003 to 2008 with 2003 accounting for the strongest figures over the 6 year period. New enterprises supported also peaked in 2003 and has fallen by 75% to 5 new enterprises supported in 2008.



LEADER /Rural Development Programme

This programme is based on the EU framework for rural development and on the national rural development strategy formulated in line with that framework. The programme for Ireland sets three main priorities:

- Improving the competitiveness of the agriculture sector
- Improving the environment and the countryside by support for land management
- Improving the quality of life in rural areas and encouraging diversification of economic activity.

The first two priorities are directed primarily at the agricultural sector. The third EU priority –quality of life and diversification is relevant to all rural dwellers including farmers, particularly in view of the growth in part-time farming. The challenges in the wider context include the provision of alternative and suitable employment opportunities for people living in rural areas and a range of services that people now want and expect locally. In this programme, actions centred on the wider rural community such as the development of rural enterprises based on local natural resources, tourism, village enhancement and environmental initiatives will be delivered in a manner that addresses these challenges and complements on farm measures.

		2003	2004	2005	2006	2007	2008	
No. of staff employed							219 (e)	
Salaries/administration						8,400	8,300	
Exchequer commitment		21,062	22,086	27,680	34,330	20,450	3,602	
Seasonal employment created		230	353	289	446	250		
Employment created(full time)		395	366	331	503	432	109	
Employment created(part- time)		238	528	301	603	370		
New Enterprise supported		407	426	319	354	219	146	
Persons trained		10,689	16,764	14,923	14,991	12,123	1,558	
Grant cost per job								

Leader is different to some of the other enterprise supports in that it is co-funded by the EU.

The table above is related in its entirety to the LEADER 2000 - 2006 Programme. Project related activity in respect of the Rural Development Programme Ireland 2007 - 2013 only commenced in February 2009. Although the programming period for the previous LEADER programmes is set out as 2000 - 2006, as is common with all EU co-funded Programmes, activity is provided for a number of years following the

official end of the Programme. The commitments to the Programme for 2003 - 2008 were co-funded between the Exchequer and European Commission.

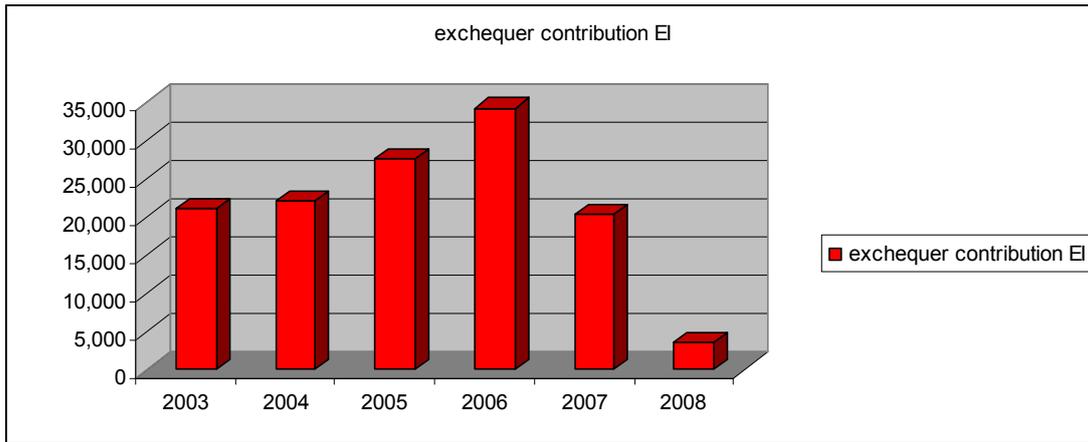
The Department of Community, Rural and Gaeltacht Affairs has no role to play in determining staffing or salary levels at Local Action Group (LAG) level. In this context, the Department does not gather figures in respect of the No. of staff employed and their respective salaries. It should be noted, that under the LEADER Programmes an amount of Programme funding is set aside by the EU for programme implementation/administration by the Groups. Other than the global administration/running cost allocation, no specific budget is set aside in respect of salaries (or any other individual administration implementation cost). Local Development Groups deliver a range of Programmes, including EU, international and national programmes, all of which provide a contribution to their running costs. In some cases these Groups also have private resources.

The figures provided for the No. of staff employed and their salary levels for 2008 were gathered after a lengthy exercise initiated at the behest of the Department of Finance in mid-2008. It represented the notional cost indicated by the Groups themselves and did not necessarily reflect the actual amount of funding provided by the Department in respect of these costs in 2008. The funding provided to the Groups in 2008 provided mostly for a contribution to their administration costs, a contribution which amounted to EUR8.3m - within this contribution no specific amount was set for salaries. A similar contribution of EUR8.4m was made towards these costs in 2007.

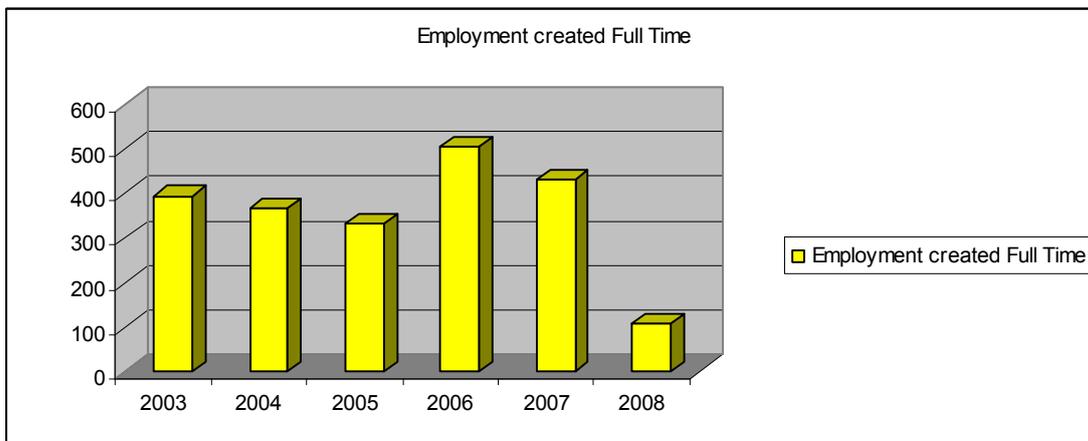
There was minimal activity in 2008. Activity under the 2000 - 2006 programming round ended in the first quarter of 2008, while there was no project activity under the new Rural Development Programme until 2009. The training figures provided are based on data returned by the 35 LEADER Groups for the period 2000 - 2006 and would include people attending high audience events, such as seminars and workshops.

Trends in Leader

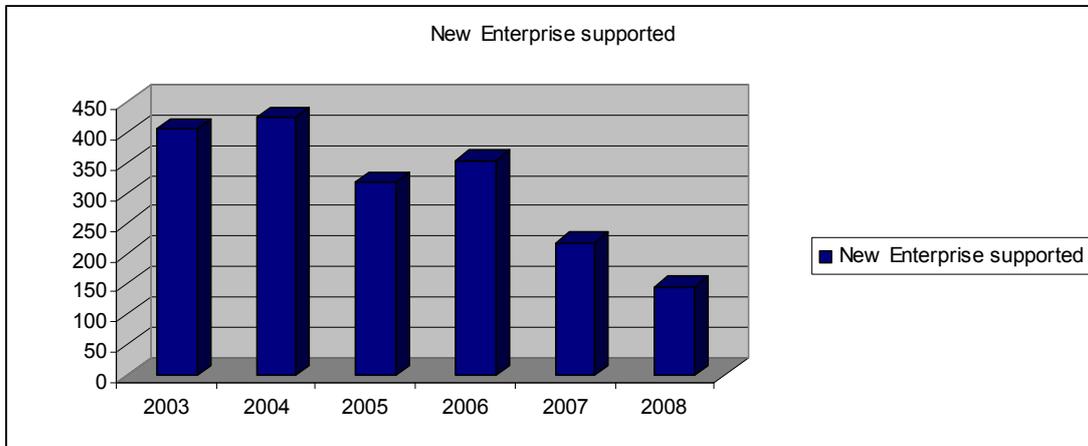
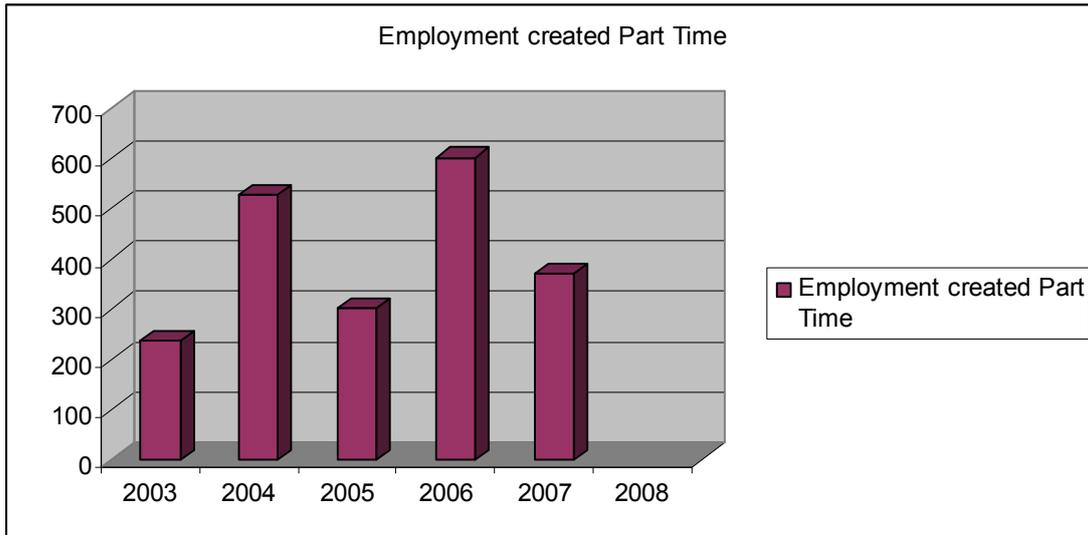
Given the information above there is no data available to examine numbers employed or salaries over the last number of years in relation to Leader. The tables below however track trends in Exchequer contribution and the various outputs achieved under the Leader programme.



Exchequer contribution peaked in 2006 which coincides with the expected end of the 2000-2006 programme. As mentioned earlier the 2007-2013 programme did not commence until February 2009 so expenditure in 2008 is minimal. Excluding 2008 exchequer contribution fell by 3% over the 5 year period 2003 – 2007.

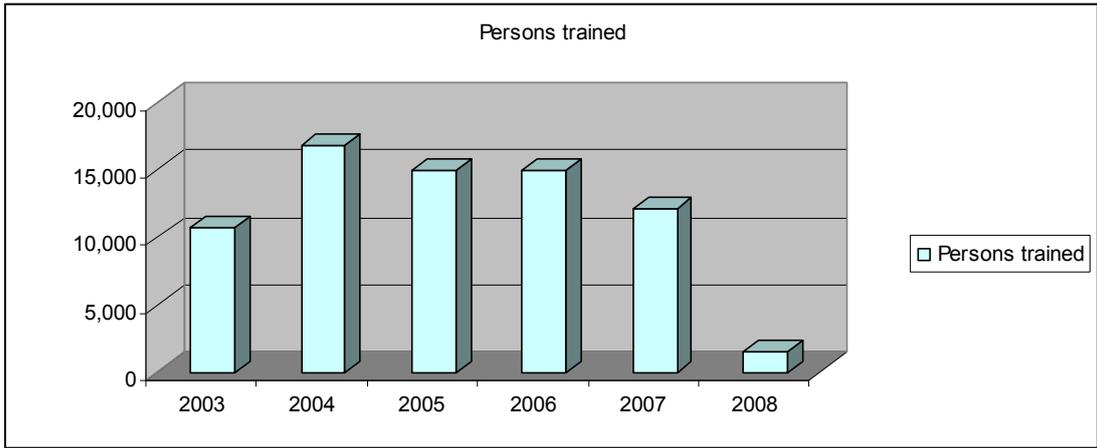


The trend in full time employment created and to a lesser degree in part-time employment created is very similar to that of Exchequer commitment to the programme peaking in 2006 and falling dramatically in 2008. Excluding 2008 figures full time employment increased by 9.4% and part-time employment increased by 56% over the 5 year period 2003 – 2007.



Figures for new enterprises supported remain reasonably constant to 2006 and fall off towards 2008 which again coincides with the life span of the 2000-2006 programmes. Excluding 2008 figures new enterprises supported has fallen by 46% over the 5 year period 2003 – 2007.

Trends in persons trained peaked in 2004 and has fallen off up to and including 2008. As mentioned earlier training figures would benefit from a more detailed classification in order to make them more meaningful.



Failte Ireland

Fáilte Ireland, the National Tourism Development Authority was established under the National Tourism Development Authority Act, 2003 to guide and promote tourism as a leading indigenous component of the Irish economy. The organisation provides strategic and practical support to develop and sustain Ireland as a high - quality and competitive tourist destination. Their mission is broadly:

"To increase the contribution of tourism to the economy by facilitating the development of a competitive and profitable tourism industry."

Fáilte Ireland works in strategic partnership with tourism interests to support the industry in its efforts to be more competitive and more profitable and to help individual enterprises to enhance their performance. It does this in 3 ways:

1. Helps to develop product offerings for both the domestic and overseas markets and lead the marketing effort to promote Irish holidays to the domestic consumer.
2. Supports enterprise development in Irish tourism, promoting best practice in operations, quality and standards and facilitating investment in tourism infrastructure.
3. Build human resource capability in the industry, investing heavily in training provision and standards across the publicly supported educational system, through training network of outreach centres and also, increasingly, via executive and management development programmes for the tourism industry.

			2003	2004	2005	2006	2007	2008	
No. of staff employed ²⁶				206.96	241.79	405.19	392.19	389.19	
Salaries (€ '000) ²⁷				20,000	19,405	19,926	30,489	31,619	
Exchequer commitment (€ '000)				52,639	57,572	72,831	77,437	82,090	
Own Resources ('000)				5,172	5,323	31,059	25,749	25,344	
Employment created(full time)									
Employment created(part- time)									
New Enterprise supported									
Persons trained ²⁸				8,878	9,865	9,920	10,027	16,000	
Grant cost per job									
Nos Employed ²⁹				231,000	246,000	250,000	320,000	280,000	

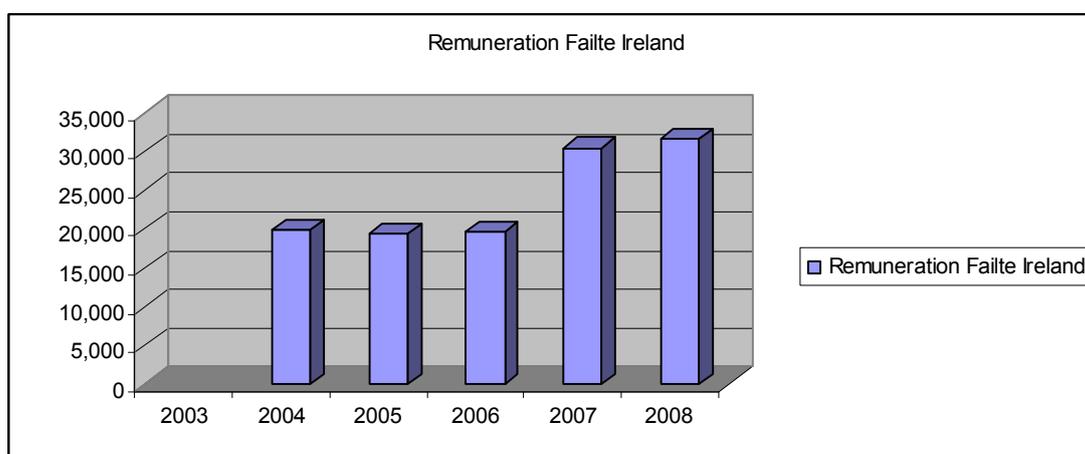
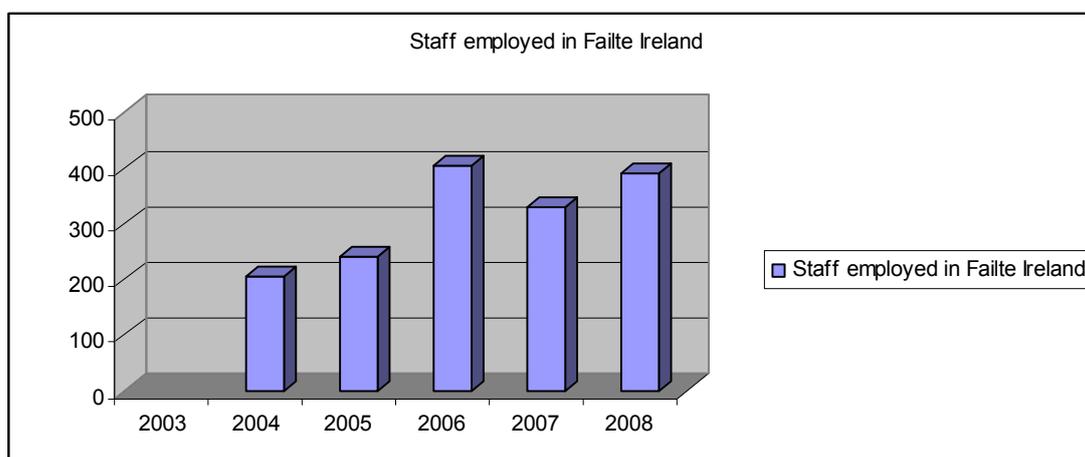
²⁶ In 2006 staff of the RTAs were subsumed into Fáilte Ireland with a consequent increase in Fáilte Ireland's numbers in 2006 as shown.

²⁷ This amount includes salaries financed by own resource income eg; €2,000 in 2009 is own resources

²⁸ Failte Ireland skills, College based programmes and Industry based programmes as per appropriate annual report

Trends in Failte Ireland

The following charts present a visual representation of the data contained in the Table above in relation to Failte Ireland. Numbers employed have increased from 207 in 2004 to 389 in 2008, an increase of 88%. A large increase was registered in 2006 when the Regional Tourism Authorities (RTA) were merged with Failte Ireland. Pay has increased as numbers have increased which is to be expected.

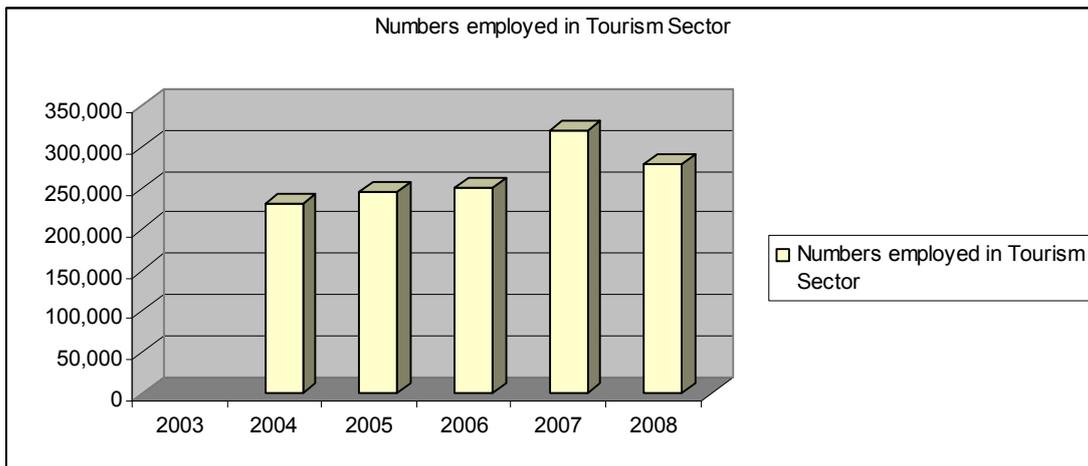
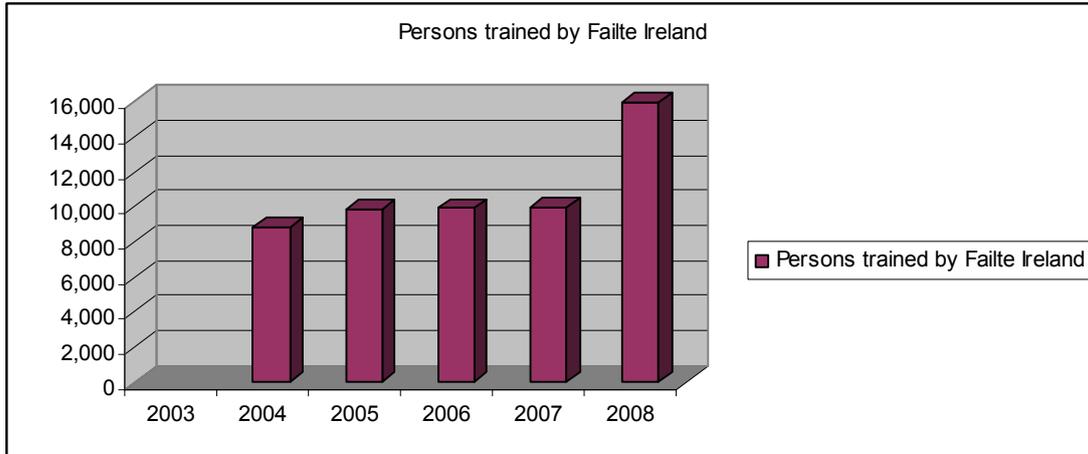


The number of people trained has also increased over the 5 year period. The term training seems to refer to such things as conferences, network conferences, workshops, advisory services etc. As mentioned earlier perhaps some clarification needs to be carried out when classifying and defining training for output purposes.

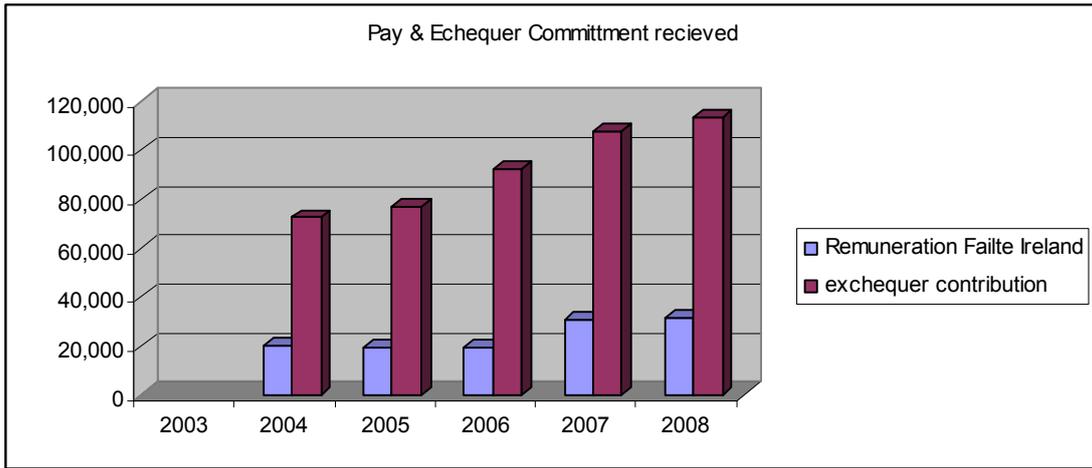
There seems to be little specific information available as to how many jobs are created or supported as a result of the existence of Failte Ireland. Given the nature of this agency and its remit to promote the 'tourism industry' this is in someway understandable. The numbers employed in the tourism sector has increased over the 5-

²⁹ Failte Ireland's published "Tourism Facts" and "Training and Employment surveys"

year period by 21%, peaking in 2007. Greater attempts will have to be made to try and define outputs and outcomes of Failte Ireland in the future.



As mentioned earlier the paybill of Failte Ireland has risen 58% in line with increased numbers over the last 5 years. The Exchequer contribution has increased by 56% over the 5 year period 2004-2008. With limited availability of tangible outputs that can be directly attributable to Failte Ireland this is a significant increase. Broad indicators such as visitors to Ireland per Failte Ireland annual reports give some indication of activities in the sector. Per Failte Ireland annual reports overseas visitors have increase from 6.4million in 2004 to 7.7 million in 2007, an increase of 20%. Information on domestic holiday is somewhat confusing but the domestic tourism industry is estimated to be worth over 1 billion Euros.



Bord Bia

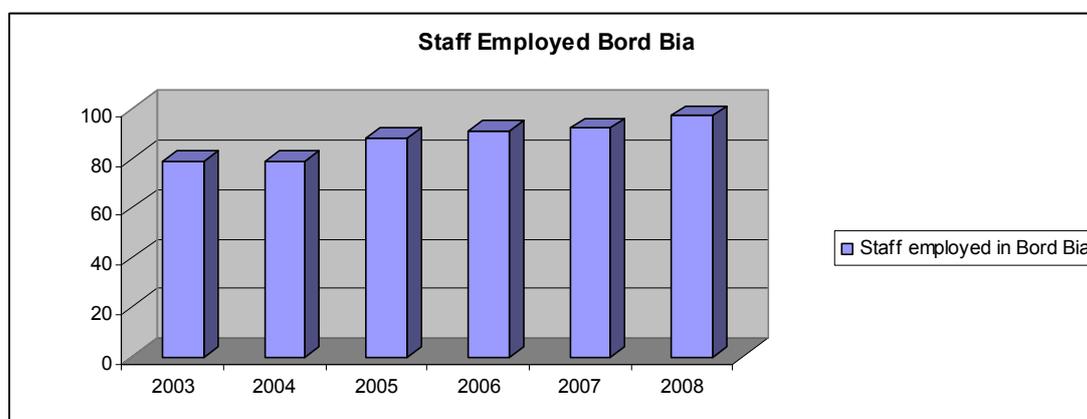
The role of Bord Bia, the Irish Food Board, is to act as a link between Irish Food, Drink & Horticulture suppliers and existing and potential customers.

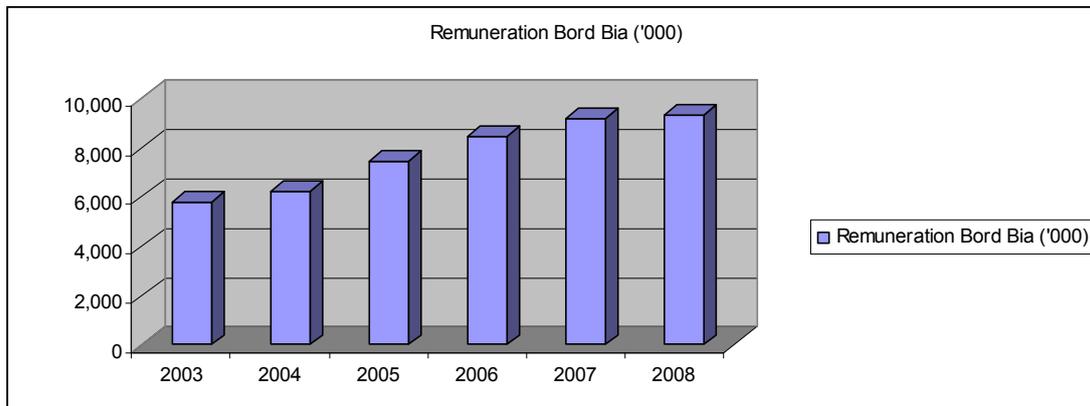
Their objective is to develop markets for Irish suppliers and to bring the taste of Irish food to more tables world-wide. They have an extensive and in-depth knowledge of the Irish industry, which they are happy to share. They can provide you with details of exports, production, quality standards, health regulations and controls, and new developments in the industry. They can also act as a bridge, putting you in touch with companies appropriate to your areas of interest.

		2003	2004	2005	2006	2007	2008	
No. of staff employed		79	79	88	91	92	97	
Salaries (‘000)		5,806	6,233	7,443	8,463	9,164	9,300	
Exchequer commitment		11,179	10,834	13,548	13,940	18,541	17,551	
Employment created(full time)								
Employment created(part- time)								
New Enterprise supported								
Persons trained								
Grant cost per job								

Trends in Bord Bia

Numbers have increased in Bord Bia from 79 employees in 2004 to 97 in 2008, an increase of 23% and the associated paybill has risen by 60%. The paybill would seem to have increased disproportionately compared with the increase numbers but perhaps this is due to the grade at which numbers have increased.

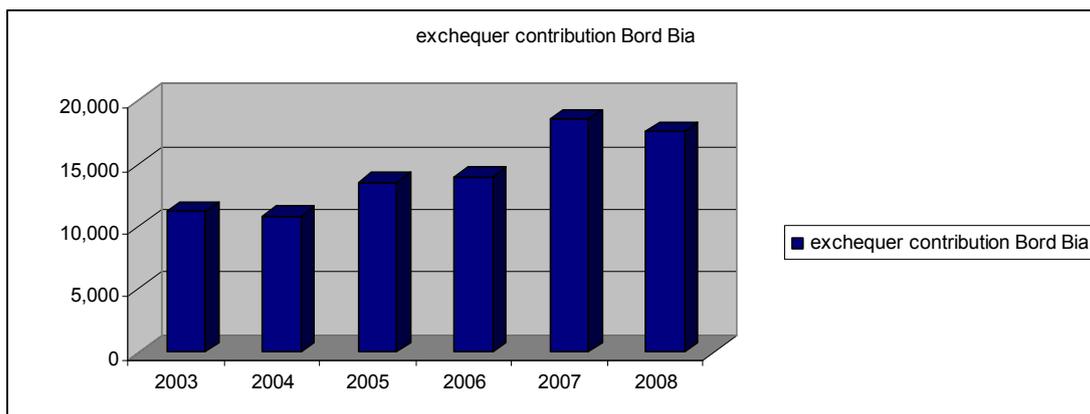




Given the nature of Bord Bia there is no data available regarding jobs, created, jobs supported, numbers trained etc. As an agency it functions at a higher level being primarily concerned with promoting and marketing the Irish food sector. Undoubtedly this supports enterprises, jobs etc in the sector but it is difficult to report on any specifics.

Bord Bia has a network of foreign office to assist them in their efforts in Amsterdam, Frankfurt, London, Madrid, Milan, Moscow, New York, Paris and Shanghai. Per the Bord Bia 2007 annual report the value of Irish food, drink and horticulture rose by €1.3bn from 2005 to €8,681bn in 2007.

As can be seen from the graph below the exchequer contribution to Bord Bia has increased from €11m in 2003 to €17.5m in 2008 which represents an increase of 57%.



Bord Iascaigh Mhara

BIM is the Irish State agency with responsibility for developing the Irish Sea Fishing and Aquaculture industries. BIM was established under the Sea Fisheries Act 1952.

A primary objective of BIM policy is to expand the volume, quality and value of output from the seafish and aquaculture sectors. BIM's approach is to focus on the opportunities for growth in these sectors while seeking to alleviate constraints that impede development.

BIM provides a range of services including advisory, financial, technical, marketing and training supports to all sectors of the Irish seafood industry. The four development divisions of BIM deliver these services through a number of integrated programmes. The programmes are funded from the Exchequer, the European Commission and charges for services.

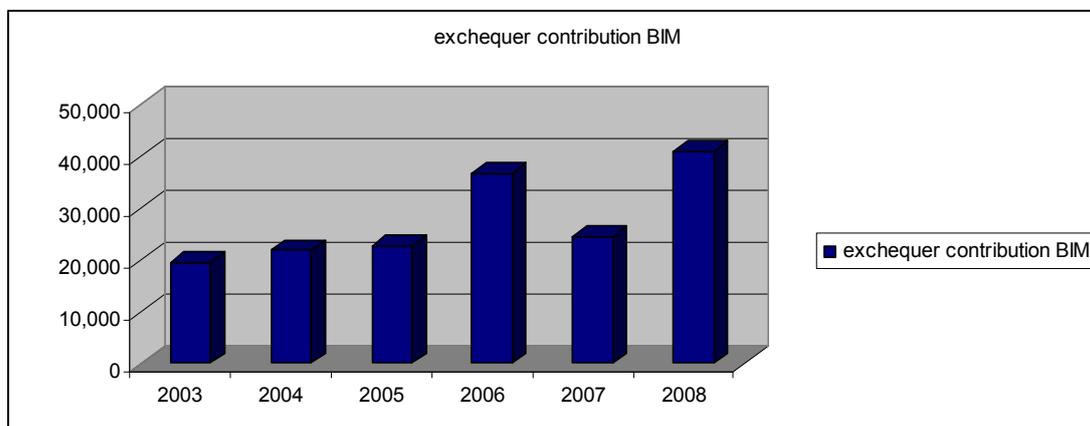
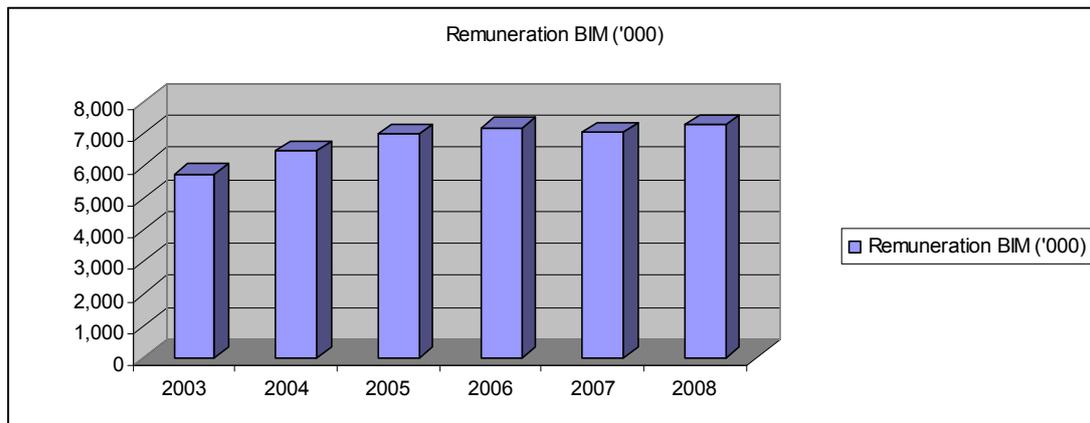
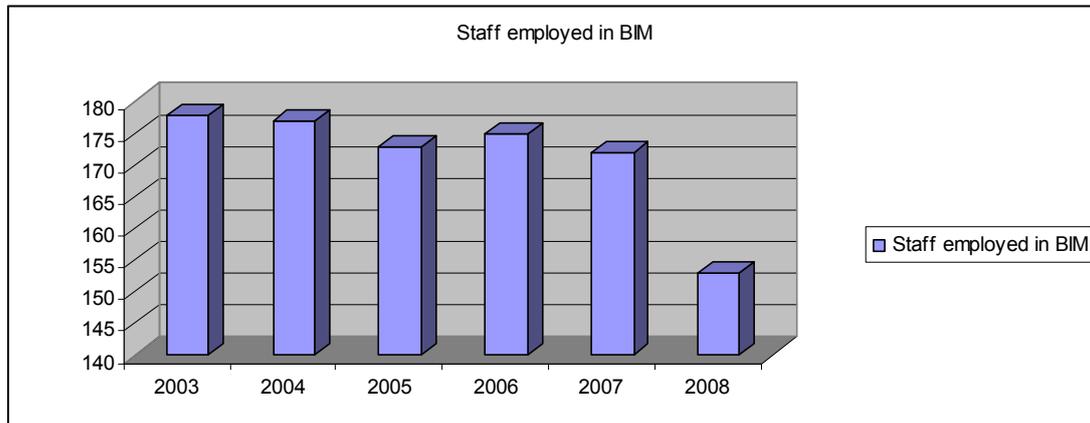
BIM provides marketing solutions that assist client seafood companies to identify and secure market advantage for Irish seafood products at home and overseas.

One of the key roles of BIM is to promote awareness of careers within the seafood industry and to develop its human resources. They provide training in catching, fish farming and seafood processing.

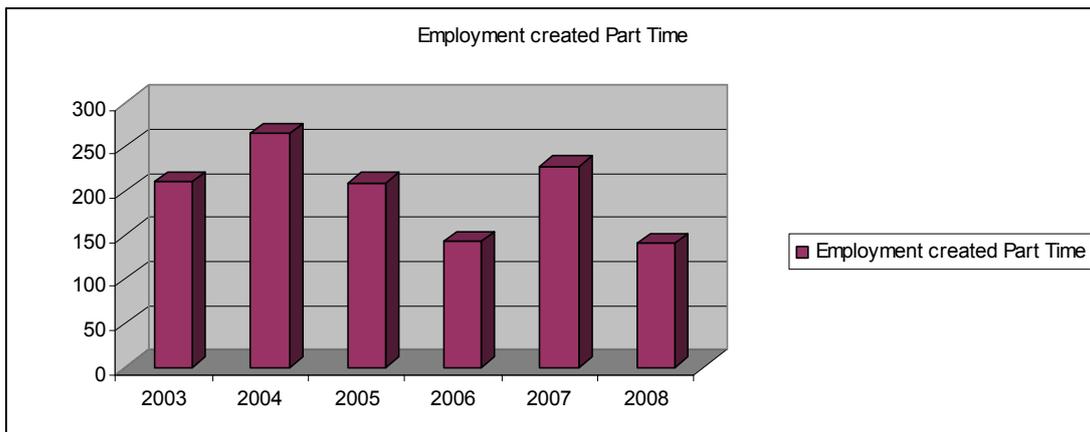
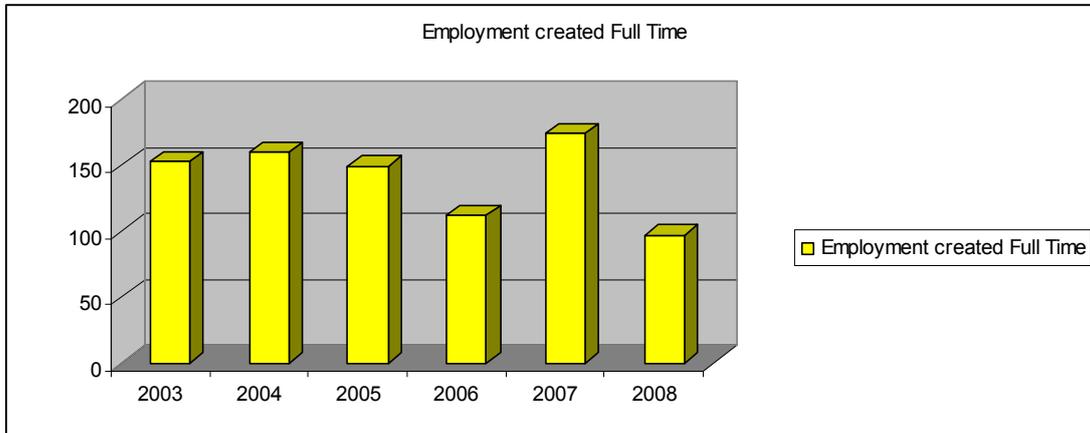
		2003	2004	2005	2006	2007	2008	
No. of staff employed		178	177	173	175	172	153	
Salaries		5,757	6,462	6,981	7,210	7,053	7,282	
Exchequer commitment		19,516	22,013	22,901	36,776	24,585	41,096	
Employment created(full time)		153	160	149	112	174	97	
Employment created(part- time)		211	266	209	142	228	141	
New Enterprise supported		188	168	267	350	177	221	
Persons trained		1681	1664	1826	2098	1705	1937	
Grant cost per job		43112	65644	88351	83453	60014	77480	

Trends in Bord Iascaigh Mhara

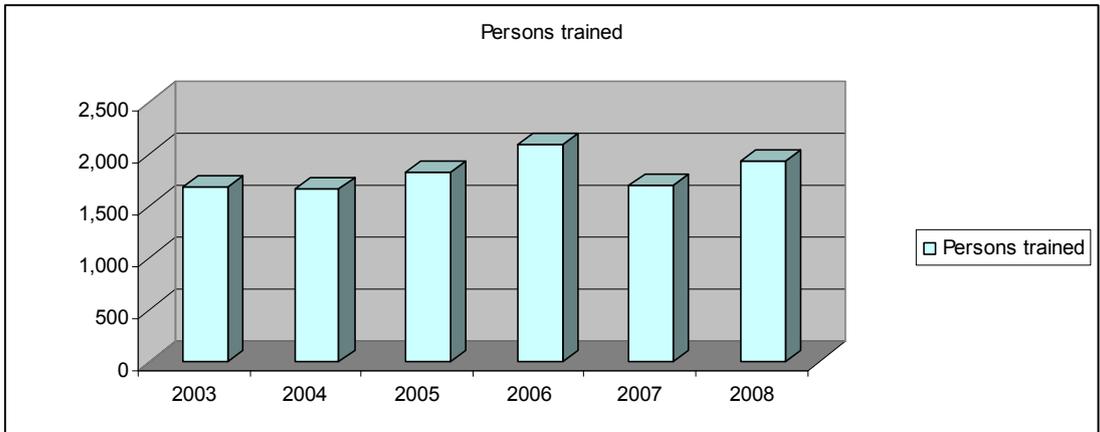
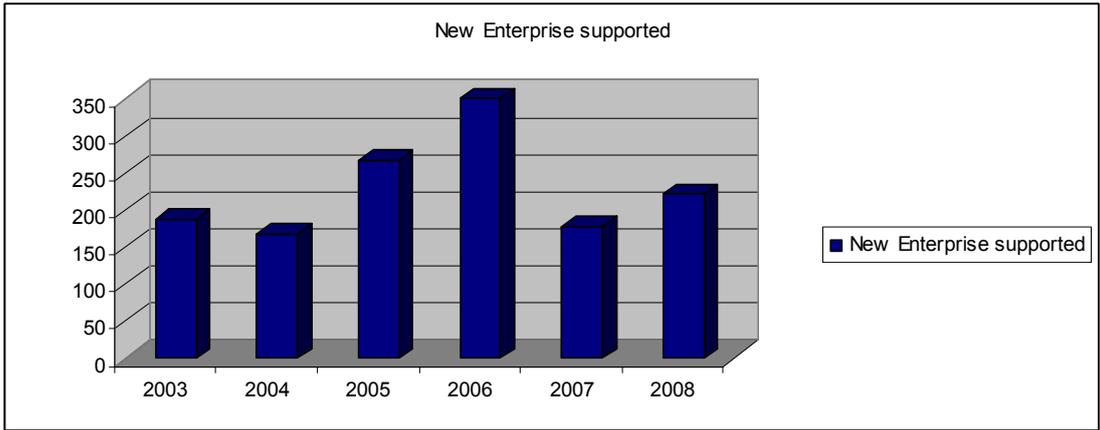
Numbers employed in Bord Iascaigh Mhara have dropped by 14% over the 6 year period. The corresponding period has seen the paybill rise by almost 27%. The increase in Exchequer contribution to Bord Iascaigh Mhara is larger rising from €19.5m in 2003 to €41m in 2008 which represents an increase of over 110%, a large increase over the time period concerned.



Full time employment created has dropped by 36% to 97 in 2008 compared with 2003 peaking in 2007 with 174 full time jobs created. Part-time jobs created follows a similar trend having dropped 33% from 2008 figures compared to 2003, peaking in 2004 with 266 part time jobs created.



New enterprises supported have risen by 17.6% in 2008 to 221 new enterprises supported compared to 2003 figures of 188 new enterprises supported. New enterprises supported peaked in 2006 with 350 new enterprises supported. Persons trained has risen by 15.2% over the period.



Teagasc

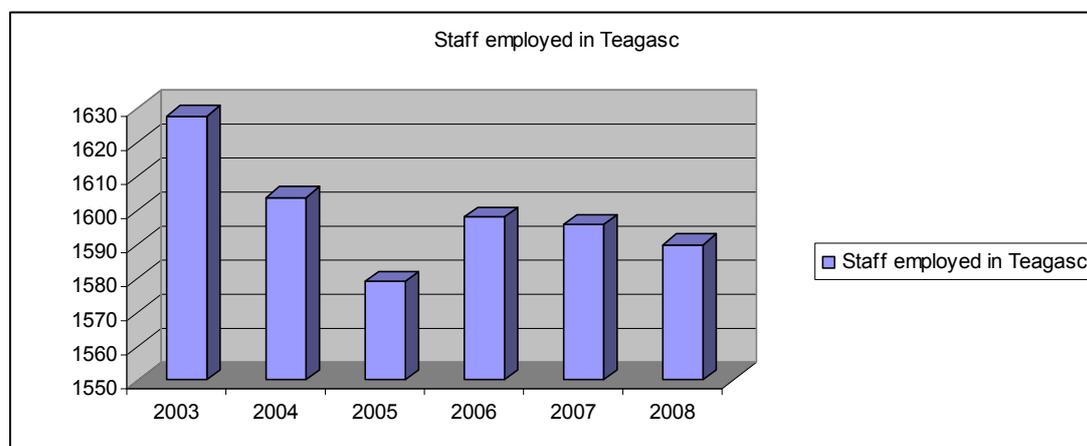
Teagasc is the agriculture and food development authority in Ireland. Its mission is to support science-based innovation in the agri-food sector and the broader bioeconomy that will underpin profitability, competitiveness and sustainability.

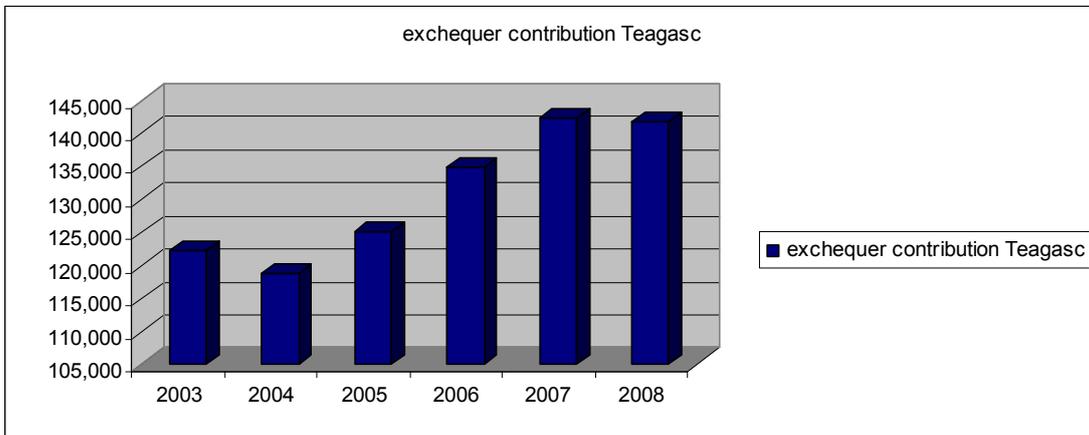
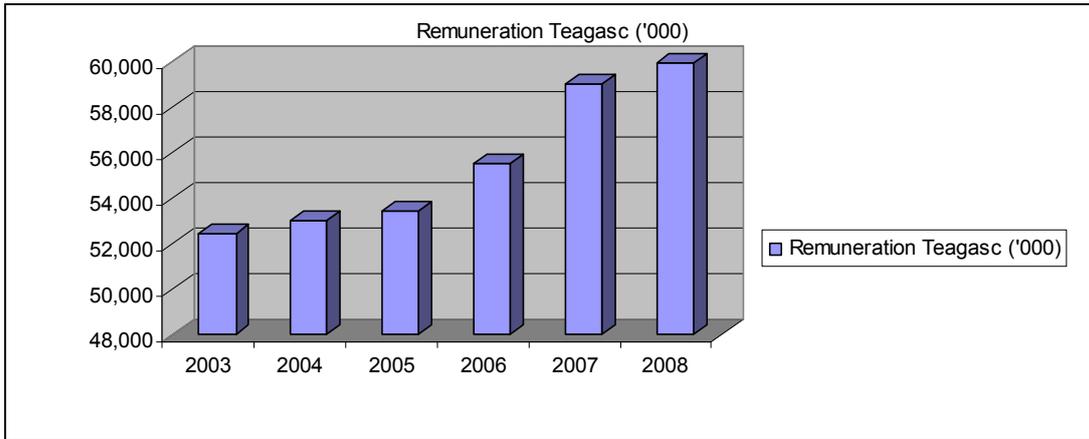
		2003	2004	2005	2006	2007	2008	
No. of staff employed		1628	1604	1579	1598	1596	1590	
Salaries		52,439	53,043	53,428	55,578	59,055	60,000	
Exchequer commitment		67,940	63,787	69,671	77,450	81,395	79,964	
Employment created(full time)								
Employment created(part- time)								
New Enterprise supported								
Persons trained		14374	13436	12641	13415	15758	15738	
Grant cost per job								

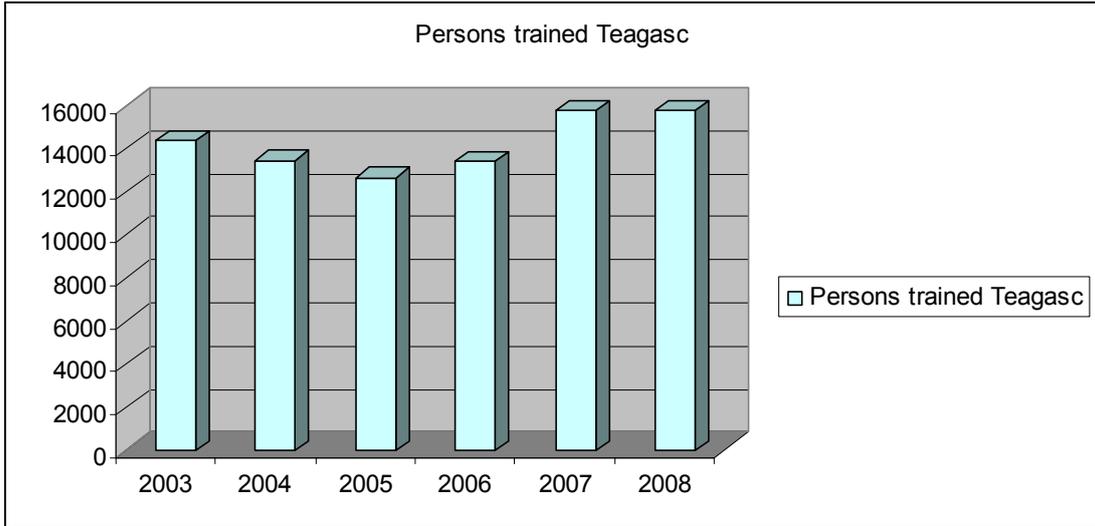
Trends in Teagasc

The bar-charts below track the trends in staff numbers and spending in Teagasc over the past 6 years. The bar-charts below track the trends of Teagasc in its entirety and as enterprise support is not the main function of Teagasc they do not allow for any comment on trends in relation enterprise supports.

Persons trained are the only enterprise support related output from Teagasc. The bar chart below shows persons trained has increased by 9.5% over the 6 year period 2003 to 2008.







Appendix 2

Overseas Offices of Enterprise Support Agencies

		Tourism Irl	Enterprise Ireland	Bord Bia	B.I.M	IDA	Irish Embassy in City
1	Sydney, Australia	X	X			X	X
2	Brussels Belgium	X	X				X
3	Toronto Canada	X	X				
4	Paris France	X	X	X	X	X	X
5	Frankfurt Germany	X		X		X	
6	Glasgow G.B	X	X				
7	London G.B	X	X	X	X	X	X
8	Milan Italy,	X	X	X			
9	Amsterdam Netherlands	X	X	X			
10	Copenhagen Denmark	X					X
11	Madrid Spain	X	X	X	X		X
12	New York USA	X	X	X		X	X
13	Wien Austria	X					
14	Shanghai China	X	X	X		X	X
15	Mumbai India	X					
16	Tel Aviv Israel	X					X
17	Tokyo Japan	X	X			X	X
18	Dubai UAE	X	X				
19	Auckland NZ	X					
20	Poznan Poland	X					
21	Johannesburg SA	X					
22	Stockholm Sweden		X				
23	Budapest Hungary		X				X
24	Dusseldorf Germany		X		X		
25	Moscow Russia		X	X			X
26	Prague CR		X				X
27	Warsaw Poland		X				X
28	Riyadh S.Arabia		X				X
29	Boston USA		X			X	X
30	Los Angeles USA		X				
31	Mexico		X				X
32	Sao Paulo Brazil		X				
33	Silicon Valley USA		X				
34	Beijing China		X				X
35	Guangzhou China		X				
36	Hong Kong China		X				
37	Kuala Lumpur Malaysia		X				X
38	New Delhi India		X				X
39	Seoul Korea		X			X	X

40	Singapore		X				X
41	Taiwan					X	
42	Atlanta USA					X	
43	Chicago USA					X	X
44	Southern California					X	
45	California USA					X	
	Total	21	32	9	4	14	23

Appendix 3

Domestic Offices

		IDA	EI	
1	Dublin	X	X	
2	Waterford	X	X	
3	Limerick	X		
4	Cork	X	X	Shared Accom.
5	Galway	X	X	Shared Accom
6	Athlone	X	X	
7	Cavan	X		
8	Sligo	X	X	Shared Accom
9	Letterkenny	X	X	Shared Accom
10	Dundalk	X	X	Shared Accom
	Shannon		X	
	Killarney		X	