SOUTH EAST REGIONAL FORUM

ANALYSIS, FEEDBACK & RECOMMENDATIONS ON SKILLS NEEDS: PHARMACEUTICAL & MEDICAL DEVICES INDUSTRIES

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SERSF Manager
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EXECUTIVE SUMMARY

The pharmaceutical and medical devices companies in the South East employ approx. 8,200 people directly across 25 companies.

Their skills needs and training requirements are strongly influenced by the demands of the marketplace as well as the ongoing development of the regulatory environment.

There is a significant range of education and training available in the region at present. However, the demand for these courses falls below industry expectations. This is particularly true for courses in engineering and science disciplines.

There is a need for some courses to be modified and improved in response to industry skills needs.

The medical devices companies identified the need for a new course in supervisory management, aimed at operations staff that could be trained as supervisors.

Industry is finding it particularly difficult to source professional staff with experience.
METHODOLOGY

This report has been compiled based upon extensive consultation with individual enterprises and the representative bodies – IBEC’s BiopharmaChem Ireland and IBEC’s Irish Medtech Association and a review of existing skills reports. Eleven of the twenty five pharmaceutical, medical technology and related support companies in the region participated in an industry workshop on 25th January 2017, arising out of which a discussion document was compiled and circulated to all companies for further comment. In addition to this there was engagement with Higher Education & Further Education & Training Providers.

The Manager of the South East Regional Skills Forum also engaged directly with fourteen companies in the region.

Information on the profile of the pharmaceutical and medical technology was compiled from that provided by individual companies, data available from the Central Statistics Office, the Skills and Labour Market Research Unit of SOLAS, the Department of Social Protection and other sources duly credited.

Insights into education and training provision was obtained from the Higher Education Institutes, the Education and Training Boards and Skillnets operating in the region.
OVERVIEW

The vast majority of Pharmaceutical & Medical Technology Companies in South East are IDA client companies. They are concentrated in the following counties:

- **Waterford**: 6 Pharmaceutical / 5 Medical Devices / 2 Specialist Support
- **Tipperary**: 4 Pharmaceutical / 2 Medical Devices / 1 Specialist Support
- **Wexford**: 0 Pharmaceutical / 4 Medical Devices / 0 Specialist Support
- **Carlow**: 1 Pharmaceutical / 0 Medical Devices / Specialist Support

As of the first quarter 2017 out of the 11 Pharmaceutical companies in the South East there are 3,300 employees with 430 new positions for 2017 (13% increase) and 264 replacement position (8% increase).

Out of the 11 Medical Device companies in the South East there are 4,200 employees with 140 new positions for 2017 (3% increase) and 336 replacement positions (8% increase).

Total recruitment (expansion & replacement) projected for 2017 is 1,170 across a wide range of disciplines including:

- Operations
- Quality, regulatory & laboratory
- Engineering
- Supply Chain
- Finance
- HR, ICT, others
The pharma and medtech sector is included in the ‘high tech manufacturing’ category in the bar chart above.

This sector continues to grow in the South East. Many of the companies in the region are world leaders and have developed and evolved to continue to be internationally competitive. Additionally, a number of new companies have been or are being established in the region including:

- Amneal in Cashel, Co. Tipperary – to commence production in Q1 2018
- West Pharmaceuticals in Waterford – to commence production in Q2 2018.
- Albypharma in Clonmel – to commence production 2018
# Pharmaceutical & Medical Technology Companies in South East

<table>
<thead>
<tr>
<th>Pharmaceutical Companies</th>
<th>Type of Activity</th>
<th>Location</th>
<th>No. of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eurofins Lancaster Laboratories</td>
<td>Bio/pharmaceutical laboratory services, providing innovative and scientific solutions to enable customers to better manage the drug development process.</td>
<td>Dungarvan Co. Waterford</td>
<td>250</td>
</tr>
<tr>
<td>Sanofi Ireland Limited</td>
<td>Sanofi discovers, develops and distributes therapeutic solutions focused on patients’ needs. Sanofi has core strengths in the field of healthcare with seven growth platforms: diabetes solutions, human vaccines, innovative drugs, consumer healthcare, emerging markets, animal health and the new Genzyme.</td>
<td>Waterford</td>
<td>700</td>
</tr>
<tr>
<td>GlaxoSmithKline Dungarvan Limited</td>
<td>Science-led global healthcare company that researches and develops a broad range of innovative products in three primary areas of Pharmaceuticals, Vaccines and Consumer Healthcare.</td>
<td>Dungarvan Co. Waterford</td>
<td>780</td>
</tr>
<tr>
<td>GlaxoSmithKline Oral Care</td>
<td>Develop and market consumer healthcare products in pain relief, respiratory, oral health, nutrition/digestive health, skin health, Rx-To, OTC Switch, digital health and packaging innovations.</td>
<td>Dungarvan Co. Waterford</td>
<td>Incl in above figure</td>
</tr>
<tr>
<td>Merck Sharp &amp; Dohme (Ireland)</td>
<td>Human vaccine facility, biologics operation who formulate and fill vaccines and biologic products for use by people across the world.</td>
<td>Carlow</td>
<td>390</td>
</tr>
<tr>
<td>Merck Sharp &amp; Dohme (Ireland)</td>
<td>Formulation, R&amp;D and manufacturing facility, which supports MSD's initiative to bring new medicines to market more effectively. It develops innovative ways to</td>
<td>Ballydine Co. Tipperary</td>
<td>350</td>
</tr>
<tr>
<td>Company</td>
<td>Description</td>
<td>Location</td>
<td>Value</td>
</tr>
<tr>
<td>---------</td>
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</tr>
<tr>
<td><strong>Teva</strong></td>
<td>Pharmaceutical company that specialises in the development, production and marketing of generic and proprietary branded pharmaceuticals as well as active pharmaceutical ingredients</td>
<td>Waterford</td>
<td>700</td>
</tr>
<tr>
<td><strong>Eirgen Pharmaceuticals / OPKO</strong></td>
<td>Develop, registration, manufacture and supply of high-potency pharmaceutical products to global markets.</td>
<td>Waterford</td>
<td>120</td>
</tr>
<tr>
<td><strong>Clonmel Healthcare</strong></td>
<td>In the domestic market Clonmel Healthcare have three distinct businesses, Clonmel Ethical Division, Clonmel Special Product Division, and its Over The Counter (OTC) medicines Division, ClonMedica. Additional sales are generated through its Export Division into several international markets.</td>
<td>Clonmel Co. Tippeary</td>
<td>50</td>
</tr>
<tr>
<td><strong>Pinewood Healthcare</strong></td>
<td>Pinewood is the leading and fastest growing branded generic company in Ireland. The Company manufactures liquids, creams/ointments and powders under its own licenses in Ireland, which are distributed to its international markets directly. Pinewood also supplies contract manufacturing from this facility for the international market.</td>
<td>Ballymacarbry Co. Waterford</td>
<td>309</td>
</tr>
<tr>
<td><strong>Amneal</strong></td>
<td>Dedicated to the production of metered dose and dry powder inhalers (MDIs and DPIs), injectable products as well as biosimilars – all high-end specialty medications.</td>
<td>Cashel Tipperary</td>
<td>55</td>
</tr>
<tr>
<td><strong>AlbyPharma</strong></td>
<td>It consist of two business units. Firstly the Antibiotic plant which is a dedicated FDA approved beta-lactam facility. It has facilities to support the entire production process and produce antibiotics in the following forms, film coated tablets, hard gelatine capsules, powders for reconstitution. The second business produces solid dosage form tablets.</td>
<td>Clonmel Tipperary</td>
<td>Startup</td>
</tr>
<tr>
<td>Medical Technology Companies</td>
<td>Type of Activity</td>
<td>Location</td>
<td>No. of employees</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Abbott Ireland Vascular</td>
<td>They focuses on improving treatment options for people with coronary artery disease, mitral regurgitation and peripheral artery disease. They manufacture a broad range of vascular devices, including stent delivery systems.</td>
<td>Clonmel Co. Tipperary</td>
<td>1200</td>
</tr>
<tr>
<td>Boston Scientific Clonmel Limited</td>
<td>Manufacture pacemakers, ICDs and CRT-Ds (defibrillators).</td>
<td>Clonmel, Tipperary</td>
<td>450</td>
</tr>
<tr>
<td>Clearstream Technologies Group / CR Bard</td>
<td>Design, develop and manufacture angioplasty devices specifically for the OEM and contract manufacturing sectors</td>
<td>Enniscorthy, Co. Wexford</td>
<td>370</td>
</tr>
<tr>
<td>Nypro</td>
<td>Manufactures advanced respiratory and injectable devices for healthcare and pharmaceutical customers worldwide</td>
<td>Waterford</td>
<td>150</td>
</tr>
<tr>
<td>Lake Region Medical Limited</td>
<td>Manufacturer Guide Wires for Diagnostic and Interventional Procedures</td>
<td>New Ross Co. Wexford</td>
<td>750</td>
</tr>
<tr>
<td>Valeant Pharmaceutical Ireland - Bausch &amp; Lomb</td>
<td>Manufacturer in contact lenses and pharmaceutical care Businesses include ophthalmic pharmaceuticals, contact lenses, lens care products, ophthalmic surgical devices and instruments.</td>
<td>Waterford</td>
<td>1200</td>
</tr>
<tr>
<td>Waters Technologies Ireland Limited</td>
<td>The company designs, manufactures, sells and services ultra performance liquid chromatography (UPLC), high performance liquid chromatography (HPLC),</td>
<td>Wexford</td>
<td>325</td>
</tr>
<tr>
<td>Company</td>
<td>Description</td>
<td>Location</td>
<td>Employees</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
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</tr>
<tr>
<td>CRI Wexford</td>
<td>CRI is a leading medical device manufacturer specializing in interventional delivery devices, custom complex balloon development and high volume assembly.</td>
<td>Wexford</td>
<td>15</td>
</tr>
<tr>
<td>United Chemical Technologies</td>
<td>The company is a world leader in the field of silica-based Solid Phase Extraction (SPE) technology, routinely used in Clinical, Forensic &amp; Environmental Laboratories for the extraction of trace analytes in complex samples. The main functions of the Irish operations will include manufacturing, quality assurance, distribution and technical support services for the European market.</td>
<td>Wexford</td>
<td>17</td>
</tr>
<tr>
<td>West Pharmaceuticals</td>
<td>West Pharmaceuticals are a leading global manufacturer in the design and production of technologically advanced, high-quality, integrated containment and delivery systems for injectable medicines.</td>
<td>Waterford</td>
<td>47</td>
</tr>
</tbody>
</table>
The profile of the labour force depends upon which category of employer is being considered i.e. pharmaceutical, bio pharmaceutical and medical device.

2.2 Profile of the Biopharma Workforce

Over the period 2010-2015, the share of professional occupations within the total Biopharma industry employment increased from 23% to 29% while Craft and related occupations increased from 5% to 7%. There was a slight reduction in the share of plant and machine operatives - down from 20% to 18%, and a greater fall for managers and administrators - from 18% to 10%. The occupational profile of the Biopharma industry in 2015 is outlined in Figure 2.

Figure 2: Biopharma Industry Occupational Profile 2015

Source: Skills and Labour Market Research Unit, SOLAS, Q3, 2015.
Medical Devices

IBEC Irish Medtech Association, Q4 2016 provided a detailed analysis of skills requirements by role within the medical devices sub sector:

Profile of employment

- Operations 71%
- Engineering 12%
- Quality 8%
- R&D 3%
- Supply Chain 3%
- Other functions 3%

There is no current profile of the pharmaceutical drug manufacturers’ labour force, however, it is considered to be somewhere in between that of the bio pharma sector and the medical devices sector.

According to the EGFSN Report on the Future Skills Needs of the Biopharma Industry in Ireland 2016, most of the growth will be in the bio pharma sector.

Furthermore, pharmaceutical manufacturers and medical devices manufacturers in the region highlight the ongoing drive for greater process efficiencies, automation and higher standards of regulatory control, all of which demand new and increased levels of skills across the production and quality control functions.
5.3 Anticipated changes in the nature of employment over next 3-5 years

It is considered likely that the recent investment in Biologics manufacturing will continue while the level of activity/employment in Pharma activities will be modest / static.

Current recruitment demand is for NFQ Level 8 for Process Engineering and Scientist roles, with a stream at NFQ Level 9 - particularly for persons with experience (companies such as Regeneron are hiring high potential graduates at Level 8 without prior experience. These are trained further by Regeneron and NIBRT). A level of recruitment and training is also taking place at NFQ Levels 6/7 supported by in-company upskilling to fill Quality Assurance/Validation and Operator roles. Soft skills such as leadership, teamwork, communications and problem solving are essential for all roles. There is a strong demand for Quality Assurance/Validation skills with analytical experience as start-up operations scale up, and for technicians with analytic skills due to ongoing plant automation. A lot of project managers and schedulers are being hired during the start-up stage.

Figure 5: Biopharma Related Roles

Molecular Biology
Biochemistry
Cell Culture
Engineering
Purification
Formulation
Quality Assurance/Validation

Source: EGFSN Secretariat, Department of Jobs, Enterprise and Innovation.
The following is a summary of the key findings of the South East Regional Skills Forum from the various consultations in Q1 2017.

Purpose: To identify practical actions that industry considers necessary and will support to meet future skills needs.

Action 1. Companies to ask ‘Area Leads’ to identify skills needs / gaps and identify these by roles, levels (NFQ level or level of competency), numbers.

Areas where there are skills gaps.

The continuous changing of the regulatory environment is presenting a challenge for skills. This is relevant for both existing staff and new recruits.

While the skills gaps may be similar, the required responses will differ.

The following skills / competencies were identified as often lacking in graduates:
- Good Manufacturing Practices (GMP) and LEAN principles
- Data Integrity and its implications for
  - Systems validation
  - IT Implementation / IT Systems
- Understanding the regulatory environment (which is subject to change)
- Technical writing skills – poor skills here are a significant deficiency
- Moulding skills – lacking in most graduates
- Automation at a practical level seen as weak.
- Software design validation
- Basic lab skills
- Microbiology
**Recruitment Challenges**

Companies are finding it particularly difficult to secure talent with between 5 and 15 years industry experience.

On the other hand, companies do not have much difficulty in recruiting technicians and operators. Nonetheless, there is a need for these to be trained as technicians and operators.

The requirement here is for short targeted training courses at Level 5 and 6 on the National Framework of Qualifications (NFQ).

- Good Manufacturing Practice (GMP) and LEAN principles
- Technical writing
- Statistical analysis
- Report Writing

Companies have ample experience of recruiting top class graduates who lack the necessary ‘soft’ or ‘transversal’ skills such as problem solving, communications and team work.

There was also evidence of a lack of relevant practical skills (which may have been taught but forgotten) and a lack of appreciation of the important practical skills needed in these industries.

Private training providers such as Innopharma are quite responsive to training needs and can customize programmes and deliver training on site or locally to suit the company.

Companies were advised that the Education & Training Boards (ETB’s) currently offer the following courses at L5 in the region (Waterford, Enniscorthy & Clonmel):

- Cleanroom & Packaging Operations (26 week full time & 12 week placement)
- Pharma manufacturing Technologies (26 wks f/t & 12 week placement)
- Laboratory Techniques (26 – 33 weeks full time)
Action 2. The local Education & Training Boards (ETBs) to be approached to determine if they can provide additional training for
(a) Workforce development up to Level 6.
(b) Additional training programmes for operators.

Companies also expressed a preference for such training for existing staff to be delivered on site. This is attractive for short skills courses.

Hard-to-fill positions include
- Quality Assurance,
- Regulatory Affairs,
- Chemists
- Quality Engineers.
- Production Supervisors/Team Leaders

This is resulting in a greater focus among companies to
(a) Upskill existing staff from technical / production roles to supervisory management roles, quality assurance, regulatory affairs
(b) Conversion training of existing staff from other roles to hard-to-fill areas.
(c) In house training programmes.
(d) Contracted training by private training providers, delivered in-house or locally.

Companies pointed to a shortage of training that trains people to be ‘Front line team leaders’. It was acknowledged that such training is more appropriate for staff with a few years of experience of the production environment. Additionally, companies have often found it difficult to upskill staff from technical roles to ‘team leader’ roles. It was suggested that graduates from other disciplines eg business disciplines, could be suitable for such roles and that the technical skills may be easier to teach them. Many of the core competencies required are ‘soft skills’ or ‘transferrable skills’ related to problem solving, teamwork, communications and leadership.

It was also noted by the companies that the level of applications from candidates within the region to advertised vacancies is quite low. In other words, the pool of available talent with the required experience from within the region is quite small.
**Action 3.** Explore the establishment of a ‘Production Manufacturing Supervisor’ course for existing employees in pharma and medtech (this would likely also be relevant for companies engaged in food production).

(Note existing Level 6 ‘Supervisory Management’ QQI award.)

This could be developed by Skillnet or an Institute of Technology.

Companies will have to give time / input during course development phase and also support such a course with candidates. Training costs could be part funded by Skillnets and participating companies.

There may also be an opportunity to develop such a programme under the forthcoming Springboard funded training by Institutes of Technology.

Appropriate accreditation is regarded as valuable and worthwhile.

**Engagement with Educators**

The range of engagement by industry with educators in the region is varied, sometimes quite limited and usually on an ad hoc basis.

Education providers could better understand the requirements of the workplace and thus convey this to under-graduates.

Undergraduate work placement (for a minimum of 6 months) is recognized as an excellent means of helping to produce a ‘work-ready’ graduates and is beneficial for the company and the candidate.

Programmatic reviews that take place every five years are not catering for the regular changes that are taking place in industry. Five years is too long a gap to capture and keep up to date with changes in industry.
**Action 4. Organise for Course leaders and lecturers in IoTs to visit pharma and medtech sites and meet the experts on-site to understand the current requirements of such work environments.**

Companies agreed that it is necessary to have the right person linking in with education providers and help address skills gaps – the message was ‘if you don’t have time to commit share it with someone else in your organisation.’

**Industry forums.**

Companies felt that there are so many forums and groups attempting to support and address enterprise needs that it is confusing and difficult to engage with them effectively and efficiently. There needs to be a more cohesive provision of information.

Nonetheless it was noted that industry needs to become more involved in programme design with education and training providers.

It was noted that the South East Regional Skills Forum should help deliver a more cohesive approach to the provision of information.

**Profile of the Region**

Companies noted the need for better promotion of the south east region as an attractive region to live, work and learn.

Individual companies do engage with schools in their areas to promote careers in science, technology and engineering.

It is a significant challenge to better promote such careers and better co-ordination is required at a regional level.

It was also noted that there must be opportunities to target people on the live register for programmes that lead to employment in the pharma and medtech sectors.
Best Practice – what is working well?

Some companies have developed programmes in response to the need for supervisors and team leaders.

Eg GSK (emanating from Global GSK) – three internal programmes including a new GSK apprenticeship.

MSD in collaboration with University of Limerick (Flexible Learning Department) – a six month programme for the development of professional skills leading to a ‘Supervisory Management Certificate’.

Sanofi in collaboration with WIT, currently developing ‘Good Manufacturing Practice - Way of Working’ part time course for staff.

Companies also commended the on-line courses available from Sligo IT and observed that they are highly regarded within the industry.

Boston Scientific collaboration with WIT on LEAN Principles in Manufacturing – highly regarded.

WWETB collaboration with Nypro for training operators led to a Cleanroom & Packaging course which was very successful.
Additionally, WIT’s Department of Science conducted a scientific skills needs analysis of the pharma and medtech companies in the region in Q1 2017. The following is a summary of their findings.

**Summary of Skills Shortages identified by WIT**

- Laboratory Supervisors/Managers
- R&D Project Managers
- Formulation Scientists
- Analytical Development Chemists
- Laboratory Analysts (cross-trained in both microbiology techniques and analytical techniques)
- PhD Analytical Chemists
- Quality Assurance Personnel/Officers and Regulatory Affairs Personnel

**Other skills shortages include:**

- Aseptic Techniques
- Advanced scientific skills (i.e. Chromatography, Spectroscopy)
- Process Analytical Technologies, Chemometrics, Multivariate Data Analysis
- Knowledge of EudraLex (EU Regulations)
- Data Integrity and Regulatory Affairs
- Technical writing

**Work Based training at Level 6 / Level 7**

- **Current and future technical operators** will require 3rd level qualifications
- **GMP training** is currently required to close a significant skills gap
Advanced Training at level 8 / Level 9

• Currently no degree specific to Quality Assurance
• No graduates available
• Companies must hire people with a science degree + 4/5 years’ experience
• BSc + experience before you can register for a QP programme – very expensive
• Relevant to industry – Food, Pharma and Medical Devices

Under Graduate Work Placement Programme Feedback

• ‘The placement programme is what sets WIT graduates apart from other graduates’
• ‘There are placement programmes in other colleges which offer a longer placement duration but there is no return in investment – i.e. graduates do not return for future employment’
• ‘The placement programme almost becomes the interview for future employment within the company’
• ‘Exposure to the company and to the region’
• ‘Graduates will have the competitive edge over others who do not have any industry experience’
• Companies would like to see the duration extended – limited laboratory based work which a short-time placement student can perform
  • Minimum 6 months
  • Preferably 6-9 months or 1 year

Full WIT report available from Dr June Frisby, Department of science, WIT
jfrisby@wit.ie
Key Actions in the short-term for addressing the Skills needs of the Biopharma industry

- Develop Communications tools to better promote the sector.
- Maximise use of Springboard+ and Skillnets programmes to upskill jobseekers (935 Springboard+ Biopharma training places are approved for 2016).
- Improve the alignment of Biopharma education and training programmes.
- Increase the scale of Graduate Entry Development Programmes.
- Raise awareness of the range of rewarding careers in Biopharma including through increased Industry presence at Career Fairs, and Open Days.
- Engage with the Regional Skills Fora to highlight skills requirements and career opportunities in Biopharma.
- Increase the provision of work placements on a regional basis.
- Invest in the continuing professional development of the Workforce.
- Increase awareness of Ireland as a location of choice for workers with Biopharma skills.
- Develop a Biopharma Apprenticeship and Biopharma Career Traineeship.
<table>
<thead>
<tr>
<th>Provider</th>
<th>Course</th>
<th>Award</th>
<th>Mode</th>
<th>NFQ Level</th>
<th>ECTS Credit</th>
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<tr>
<td>IT Carlow</td>
<td>Certificate in Microbiology for the Pharmaceutical and Medical Devices Industries</td>
<td>Certificate</td>
<td>Part-Time</td>
<td>7</td>
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<td>IT Carlow</td>
<td>Certificate in Microbiology of Environmental Contaminants</td>
<td>Certificate</td>
<td>Part-Time</td>
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<td>IT Carlow</td>
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<td>Master of Science</td>
<td>Part-Time</td>
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<td>90</td>
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<tr>
<td>IT Carlow</td>
<td>Master of Science in Medical Device Regulatory Affairs</td>
<td>Master of Science</td>
<td>Part-Time</td>
<td>9</td>
<td>90</td>
</tr>
<tr>
<td>WIT</td>
<td>Certificate in Pharmaceutical Technology</td>
<td>Certificate</td>
<td>Part-Time</td>
<td>6</td>
<td>60</td>
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<tr>
<td>WIT</td>
<td>Higher Diploma in Science in Computer Science</td>
<td>Certificate</td>
<td>Part-Time</td>
<td>8</td>
<td>90</td>
</tr>
</tbody>
</table>
HIGHER EDUCATION IN THE SOUTH EAST RELATED TO THE PHARMACEUTICAL SECTOR

Education & Training Boards
Provide up to 150 places per annum on L5 Science / Laboratory / Cleanroom / Pharma one year courses.

Institutes of Technology
- Range of undergraduate full time science related programmes L6 – L8
- Range of undergraduate full time engineering related programmes L6 – L8
- Range of postgraduate full time & part time science related L9 – L10
- Range of postgraduate full time & part time engineering related L9 – L10
- Capacity to deliver these to employees through ‘Life Long Learning’ departments

Skillnets
- Range of undergraduate full time science related programmes L6 – L8

Engineering- related to MedTech

Offered in WIT & IT Carlow across L6, L7 & L8
- Mechanical Engineering
- Electronic Engineering
- Electrical Engineering
- Manufacturing Engineering

In demand from a wide variety of manufacturing sectors
The following provides an overview of the numbers of graduates from various programmes in Further and Higher education in the South East

QQI (FET) major awards* by field & level, South-East, 2016
APPENDIX

Schedule of existing courses relevant to the pharmaceutical and medical device sectors in the South East.