

Manufacturing in Ireland 2022

Today, Tomorrow and beyond
Navigating Turbulence,
Sustaining Growth



“The manufacturing sector in Ireland, as diverse and resilient as it is, will require support from government to keep the sector competitive and thriving.”

Sharon Higgins,
Director of Membership & Sectors, Ibec

Foreword	3
Manufacturing in Ireland by numbers	5
Manufacturing in Ireland – International rankings	6
2022 Irish Manufacturing Survey Findings	7
What Manufacturing Needs from Policy Makers	15
About Ibec	29

Foreword by Sharon Higgins,
Director of Membership & Sectors, Ibec

“Manufacturing continues to shine as the star performer in Ireland’s considerable economic success.”

This report spotlights our members’ priorities over the next period. We know confidence is down significantly, which is understandable given the current issues, although it is interesting that our members are more bullish about their own businesses than the wider economy, most notably in the medtech and biopharma sectors.

The only constant in today’s world is that we will continue to be presented with ‘unprecedented’ challenges. Having successfully emerged from the pandemic, our manufacturing businesses now face into the energy cost crisis, the highest inflation in many years, and continued supply chain issues, all playing out against the backdrop of war in Ukraine. We also have to deal with the more constant challenges; climate change, changes to the global tax regime and Brexit. And yet, throughout, manufacturing continues to shine as the star performer in Ireland’s considerable economic success. The state exported a record €165.2bn of total goods in 2021, which is a testament to this diverse sector’s ability to navigate through turmoil, while simultaneously growing their organisations, increasing their input into global markets, and delivering hugely significant levels of employment and tax revenue into the Irish economy.

Based on Ibec’s recent survey of members, this report spotlights our members’ priorities over the next period. In a sector that depends on energy for production, the cost of energy for the manufacturing industry is currently the top challenge, with cost of materials second, cost of labour a close third, and availability of raw materials and energy also cited as major challenges. Encouragingly, the majority of CEOs will continue to advance sustainability by increasing investment in this area over the next six months, and acceleration of digital technology also remains a priority for investment.

Our report also focuses on the key policy issues needed to underpin Ireland's manufacturing success and ensure our manufacturing companies, homegrown or multi-national, and continue on their growth trajectory. Key policy areas that Ibec will focus on include; sustainability & energy, trade & supply chains, innovation & skills, digitisation, taxation and regulation.

Ireland has achieved standout success in developing strong clusters in life sciences, technology, food and drink. But we know international competition for investment never stays still and competitor countries are constantly nipping at our heels. Ireland must anticipate this by never staying still ourselves; as well as nurturing our business friendly environment, we also need to take care of the social infrastructure that is key to being a great place to live and work. We know where the problems are; housing, broadband, and still some bottlenecks in road infrastructure. We also know how important it is to focus on education, so that access to talent remains one of our key strengths.

Manufacturing is mostly a modern game, with leading edge technologies deployed in high tech, ultra modern, purpose built facilities. Careers in manufacturing are highly skilled, high value and highly rewarding, with Irish employees and executives achieving great things on daily basis that resonate globally.

In this report, Ibec wants to highlight manufacturing success in Ireland, its fundamental importance to our economy, and the importance of getting the policy environment right so that we have what it takes to deepen investment and innovation into the future.

Sharon Higgins,
Executive Director, Membership & Sectors, Ibec



Manufacturing in Ireland by the numbers

260,000

260,000 people -
12% of total employment

€12.5 billion

€12.5 billion in wages and
employment taxes annually

150,000

Irish manufacturers employ
150,000 people abroad; 60,000
in the US and 25,000 in the UK.

€1.7 billion

€1.7 billion of tangible
investment

28.8%

28.8%, or over €4.4 billion
of corporation tax

€20 billion

€20 billion spent each year
on goods and services from
suppliers in the Irish economy

90%

Irish owned manufacturing
exporters grew sales by over
80% between 2010 and 2021

64%

Inward FDI manufacturers
grew their exports by 64%
in the same period

€165.2bn

The state exported a record €165.2
billion worth of goods in 2021

Manufacturing in Ireland – International rankings



No. 2
exporter of medical
devices in Europe



No. 1
exporter of contact
lenses in Europe



No. 2
exporter of orthopaedic
products in Europe



No. 2
exporter of complex
pharmaceutical goods
and medicines in Europe



No. 1
exporter of antisera
and immunological
products in Europe



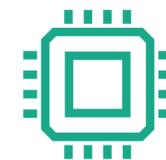
No. 2
exporter of
vaccines in Europe



No. 1
net exporter of dairy
ingredients, beef, lamb
and spirits in Europe



No. 1
exporter in Europe
of specialised
nutrition products



No. 5
exporter of data
processing machines.

Irish Manufacturing Survey Findings 2022



Key Insights Summary



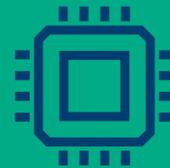
While confidence is down from last year, more than half of the manufacturers surveyed continue to be positive about the external environment (53%) and their own businesses (65%)



Despite rising costs on several fronts, 62% of CEOs intend to increase their investment in sustainability over the next 6 months to future proof their business for sustainable long term value



However, optimism around sales/profitability are held in check by caution from rising costs and supply chain instability



Acceleration of digital technology also remains a priority with 53% expecting to increase investment in digitisation, potentially with a view to bring operational efficiencies to scale



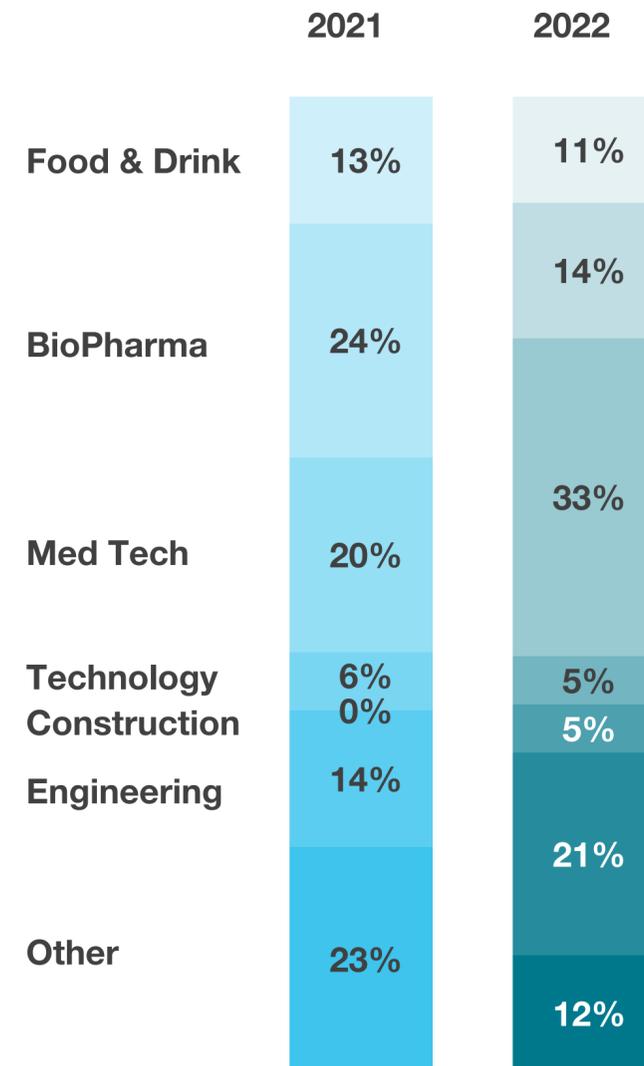
Energy costs/efficiency is the greatest challenge for all businesses, followed by 77% citing cost of raw materials and 74% calling out cost of labour as major challenges



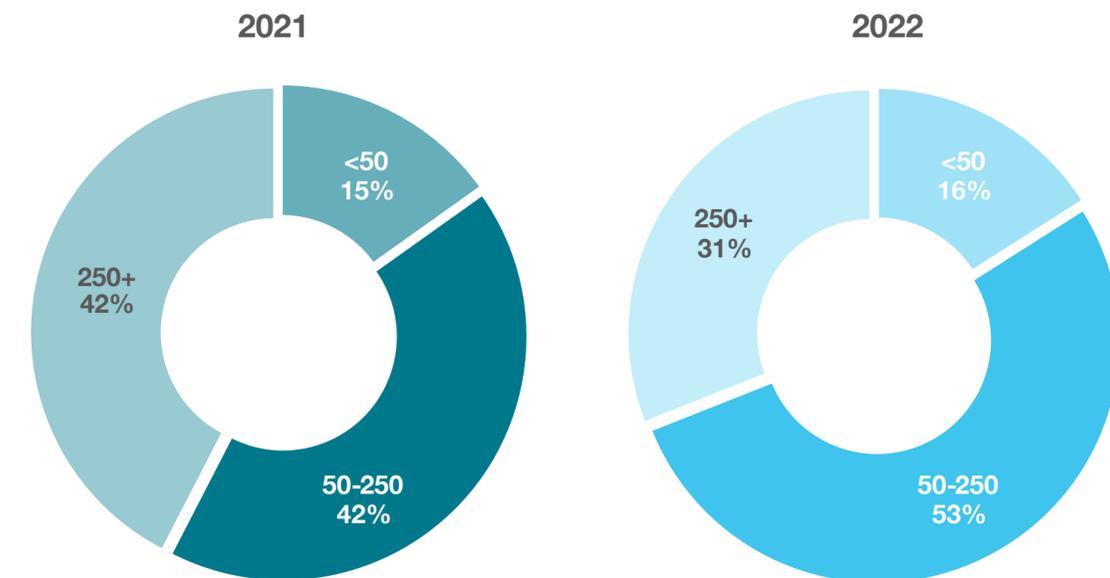
Leading priority for manufacturers is access to labour and immediate capital investment

Participant Profile

A wide range of industry sectors and company sizes are represented in the 2022 report, consistent with previous years surveys.



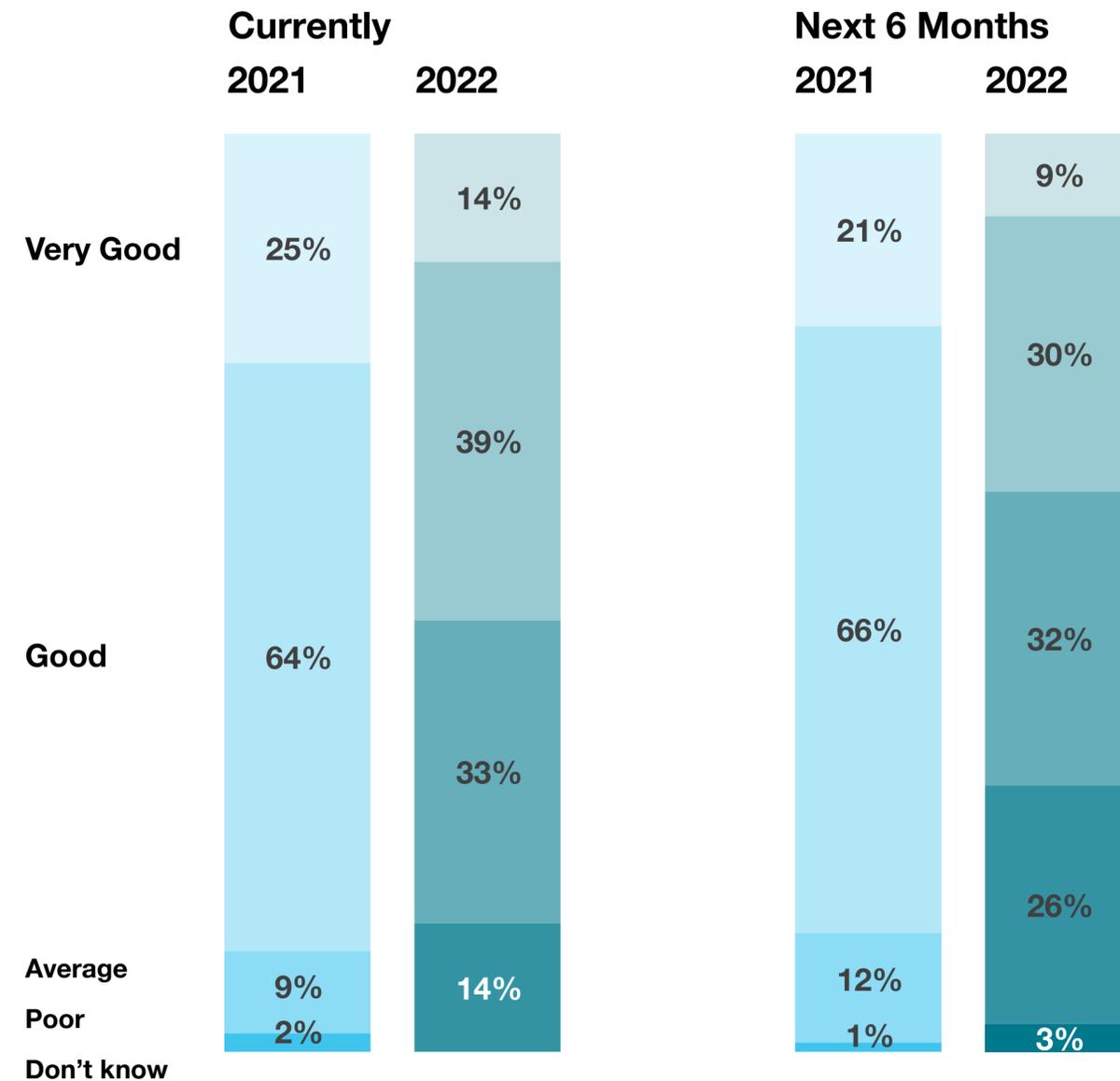
Which one of the following best describes your organisations main manufacturing activity in Ireland?



How many full and part-time employees does your organisation have in Ireland?

How CEOs feel about the manufacturing environment (2021 v 2022)

The manufacturing environment in Ireland is felt to have deteriorated considerably between 2021 and 2022 (the very good and good rating has gone from 89% to 53%) and is expected to get worse in the next 6 months with the poor rating moving from 14% currently to 26% in the short term .

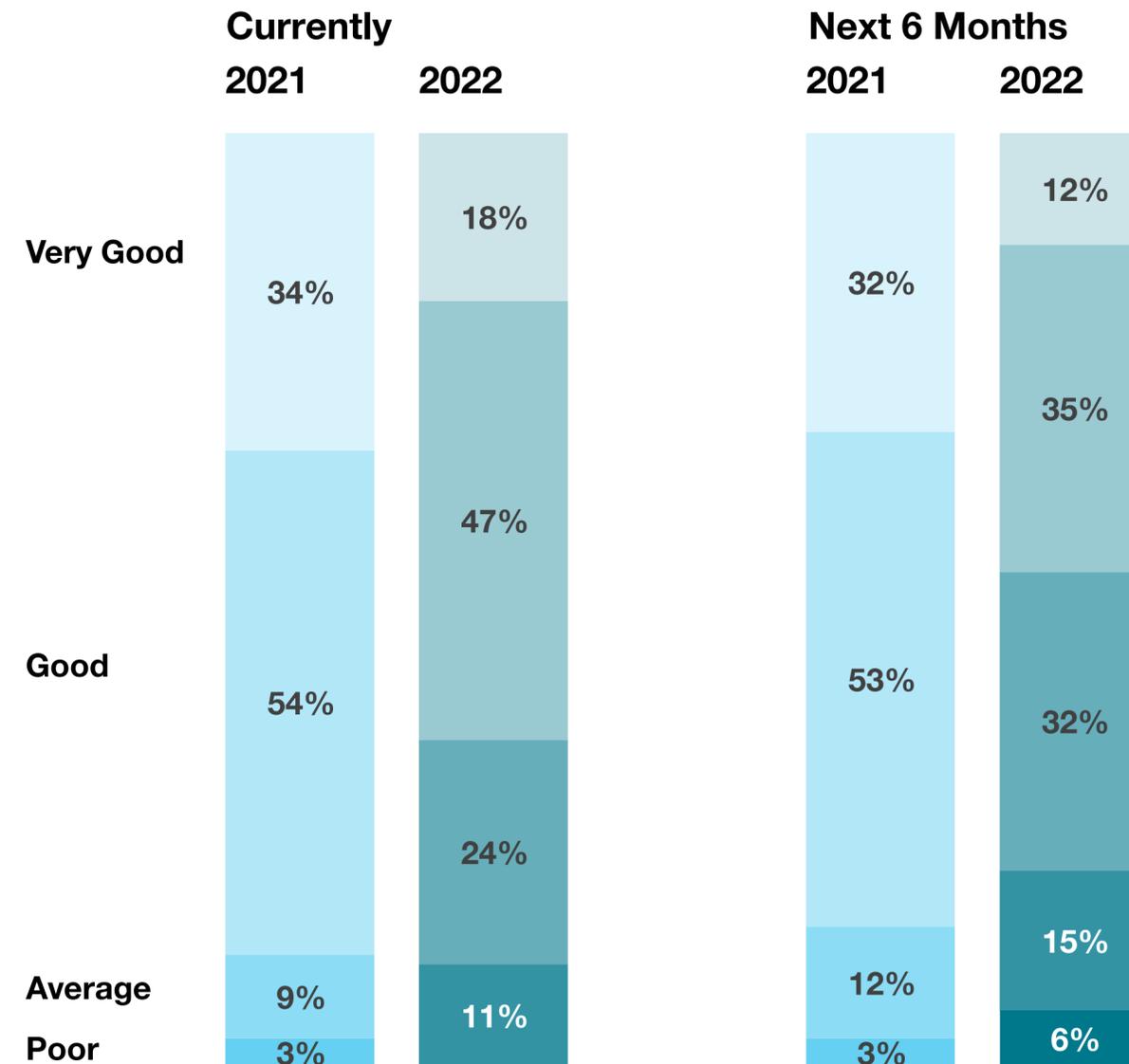


How would you assess the manufacturing environment in Ireland as it is currently and how it will be over the next 6 months?

How CEOs feel about their manufacturing business (2021 v 2022)

65% of business leaders, mostly from the pharma and medtech sectors, continue to be more bullish about the prospects for their own businesses currently.

However, a similar pattern is evident in that the current climate is not as good as this time last year and expected to get worse. Fewer business leaders (47%) are positive about their business prospects over the next 6 months.

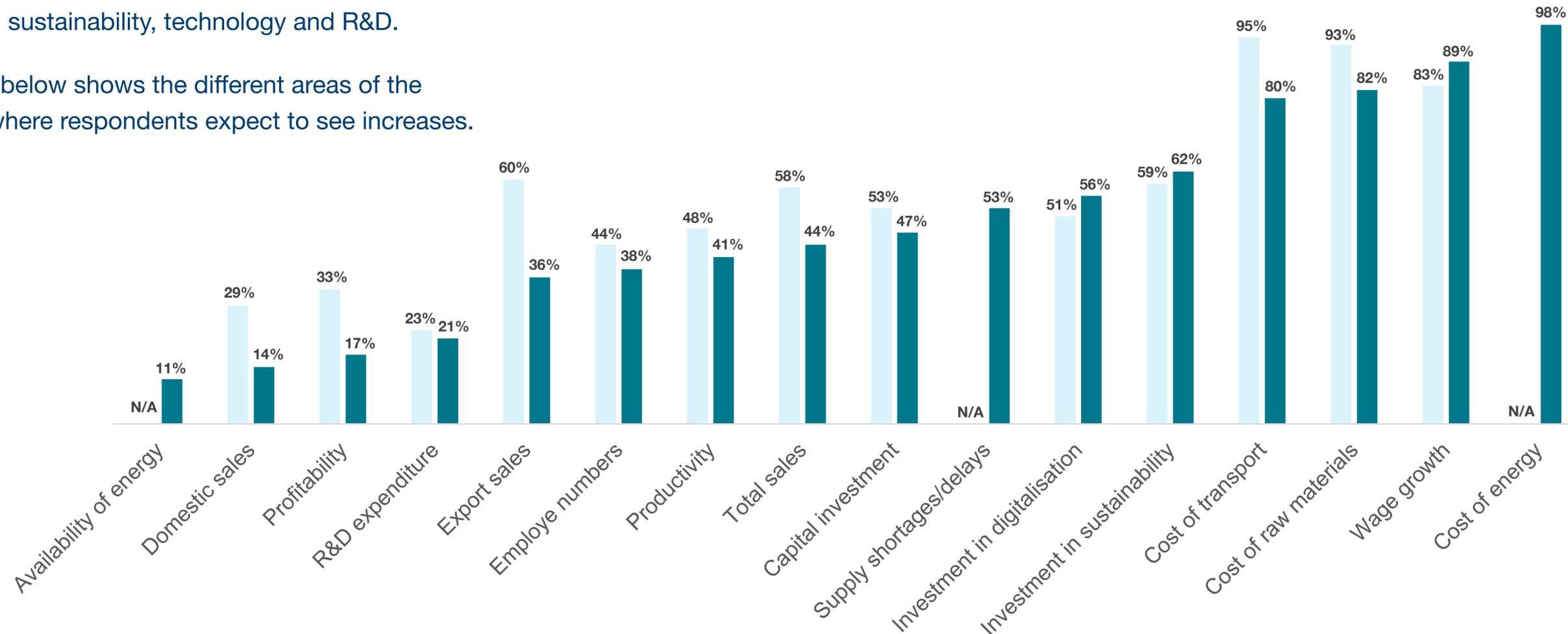


How would you assess your manufacturing business in Ireland as it is currently and how it will be over the next 6 months?

Expected outlook over the next 6 months

While manufacturing businesses are facing increased costs on a number of fronts and have lower expectations in terms of increased sales/profitability, they still expect to invest in sustainability, technology and R&D.

The graph below shows the different areas of the business where respondents expect to see increases.



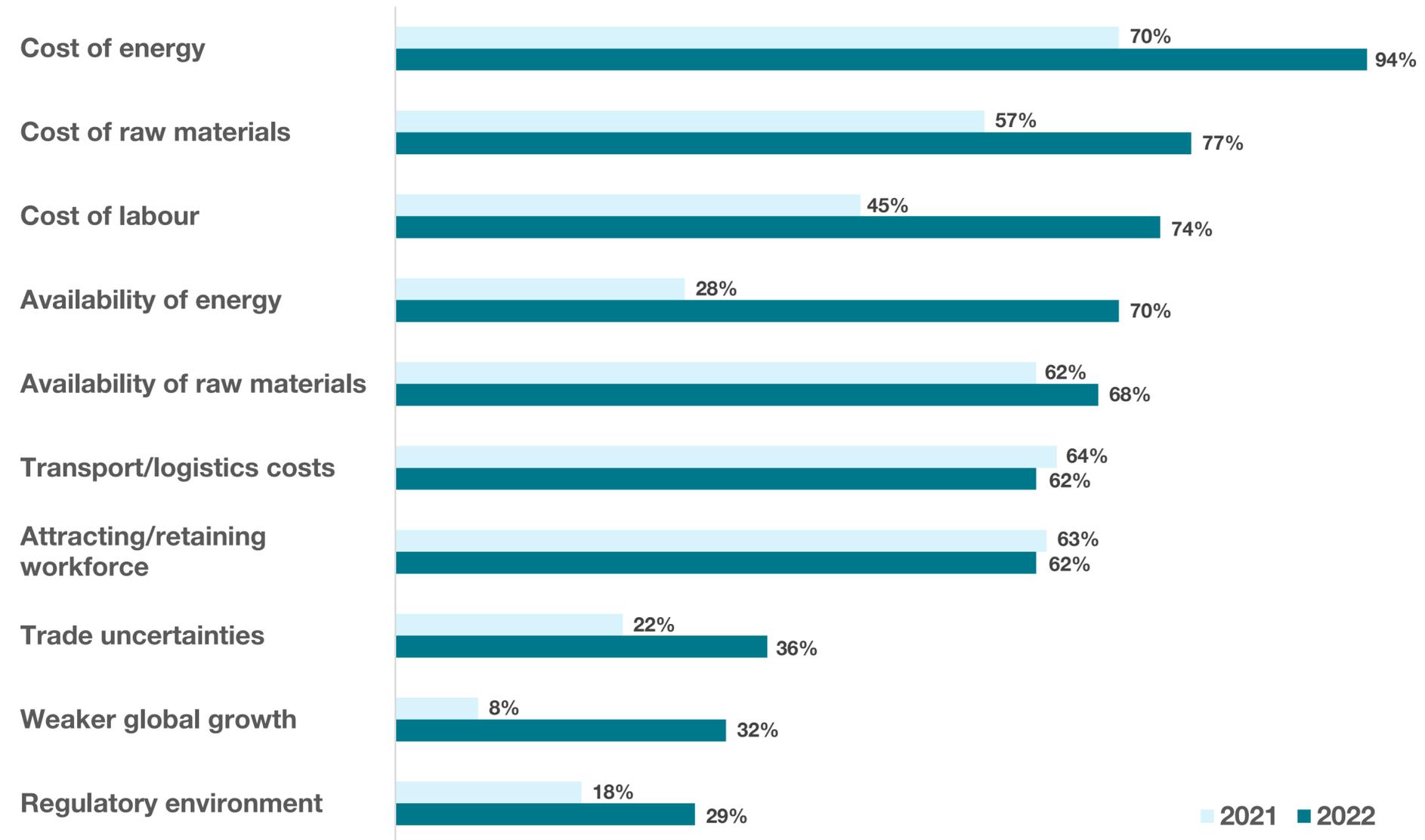
Q4 Do you expect the following to increase, stay the same or decrease for your manufacturing business in Ireland over the next six months (excluding seasonal factors)?

% Expected an increase in...
■ 2021 ■ 2022

Business challenges 2021 v 2022

The expectation of increased costs across energy, labour, raw materials and transport will pose a major challenge for all businesses in the next 6 months.

While many of the Covid related challenges assessed as major in 2021 are no longer perceived as significant challenges in 2022.



Which, if any, of the following do you expect to be a major challenge for your manufacturing business in Ireland over the next six months?

Significant cost increases expected

98%

Almost all respondents expect increases in cost of energy (98%), wage growth (85%) and cost of raw materials (82%).

Investment continues to be strong despite headwinds

62%

Three out of five (62%) expect investment in environmental sustainability to increase.

56%

Half (56%) expect to increase investment in digitisation/ advanced manufacturing

47%

Just under half (47%) expect to increase capital investment

38%

38% expect to increase employee numbers

The top challenges for manufacturers are:



Cost (94%) and availability (70%) of energy



Transportation and logistics (major challenge for 62%)



Attracting and retaining a quality workforce (major challenge for 62%).



Cost (77%) and availability (68%) of raw materials



Cost of labour (major challenge for 74%)

The number 1 priority identified for companies was:

27%

Energy costs (27%)

20%

Managing supply chains (20%)

6%

Increasing production (6%)

12%

Access to labour (12%)

2%

Cost of labour (2%) with 30% citing it as in the top 3 priorities

What Manufacturing Needs from Policy Makers



Recommendations to Government



Energy & Sustainability

- Ensure new energy cost supports provide sufficient cover for firms facing exceptional price increases and competitive pressure.
- Address short & long-term energy security risks through a new comprehensive energy transition plan.
- Accelerate the transition to a sustainable zero carbon economy by expanding supports for renewables, energy efficiency and circular economy product design.



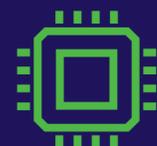
Trade & Supply Chains

- Support an ambitious EU trade agenda which promotes trade at multilateral and bilateral levels.
- Support businesses efforts to better anticipate risks and minimise exposure to supply chain shocks and consult with the private sector to advance national security interests and enhance open strategic autonomy.



Innovation & Skills

- Develop a national skills strategy for manufacturing. Identify the next generation skills required to support Industry 5.0 and invest in targeted supports and training programmes to ensure necessary pipeline of diverse talent.
- The creation of a globally competitive innovation ecosystem.



Digitisation

- Engage industry, shape and turn new digital policies, rules and targets to 2030 into clear trajectories, actions, and implementation that enhance our manufacturing base.
- Ireland must develop, co-ordinate and adequately resource national cybersecurity and regulatory capacities in expected digital regulation impacting advanced manufacturing.



Taxation

- Improve our R&D Tax credit, CGT and EIS regimes.
- Introduce accelerated capital allowances for advanced manufacturing.



Regulation

- Ensure that regulatory frameworks keep pace with new technologies in a way that facilitates and does not hinder innovation, ensuring compliance.
- Critically assess all new regulations during development to avoid any negative impact on the business environment.

Energy & Critical infrastructure

To remain competitive and achieve growth and scale, businesses must be supported by world class infrastructure. Roads, bridges, transport systems, airports, ports, power, broadband, water, sewage and other utilities have a direct impact on a firm's productivity, competitiveness, and investment potential. Meanwhile, affordable housing, healthcare, education, leisure and transport services are critical to ensuring Ireland remains an attractive place to live and work. Ireland's ability to deliver this critical infrastructure and keep pace with growing demand has been frustrated by costly and cumbersome planning processes, poor spatial planning, and high development costs.

In the short-medium term, access to secure and affordable energy remains the primary concern for business. Ireland faces significant energy challenges because of the war in Ukraine and a domestic electricity supply constraint. These are unrelated developments coming to a head at the same time. Ireland must introduce effective supports to help Irish firms manage exceptional energy price increases. Ireland is already behind the UK and other EU Member States in this regard and Irish firms already face a competitive disadvantage.

The schemes announced in Budget 2023 are welcome and must be strengthened in 2023 if necessary. Meanwhile, Ireland must develop a robust long term energy transition plan to avoid a repeat of the current electricity supply challenges and ensure Ireland transitions to carbon neutrality in a secure and cost effective way.

Recommendations

- Ensure new energy cost supports are fit for purpose and provide sufficient cover for firms facing exceptional price increases and competitive pressure.
- Undertake a comprehensive review of Ireland's energy security and take action to address risk areas and give regulatory certainty to key technologies
- For An Bord Pleanala to exercise its discretion under sections 131 and 137 of the Planning Act to seek stakeholder feedback on 'draft' decisions.
- Ramp up investment in critical infrastructure using public-private partnerships (PPPs)
- Adequately resource the registration and licensing regime for commercial water abstraction

Ibec's [Better Lives, Better Business](#) Campaign aims to make Ireland a better place to live and work by persuading policymakers to address these challenges around the country's burgeoning capacity and infrastructure constraints.

Sustainability

Corporate sustainability has taken on new meaning and importance in recent years. What was once primarily an environmental concern, now encompasses a wide range of environmental, social and governance (ESG) risks. Forward thinking firms are now making sustainability a mainstream strategic priority for their business and embedding good ESG practises across their organisation.

These firms recognise that investment, talent, and consumers will increasingly flow to businesses that champion the interests of all stakeholders not just shareholders.

Government policy must also be enhanced to ensure Irish firms can meet their sustainability goals in a timely and cost-effective way.

New policies are particularly needed to help address Ireland's many environmental challenges from climate change to air quality. This is the primary focus of Ibec's Better Lives Better Business campaign.

Recommendations

- Strengthen financial and advisory supports for Irish firms developing ESG/ sustainability strategies in line with industry best practice
- Accelerate the transition to carbon neutrality by scaling up and expanding industry supports for renewables and energy efficiency
- Review the R&D tax credit to ensure it supports low/zero carbon technologies
- Provide new financial supports and incentives to help embed circular economy product design and innovation and stimulate indigenous reprocessing of end-of-life materials

Ibec is working with industry leaders and ESG experts to develop training programmes and resources for firms at various stages of their sustainability journey. Ibec's forums keeps members abreast of key developments and best practice on ESG topics like sustainability reporting, supply chain due diligence, carbon budgets, whistleblowing legislation, and diversity in the workplace.

Sustainability (continued)

“We need to continue to focus on the things that made us successful to date and sustain the whole ecosystem of what makes Ireland a good place to do business.”

Pfizer



Ibec's commitment to the United Nations' 17 Sustainable Development Goals

The Sustainable Development Goals are a call for action by all countries to promote prosperity while protecting the planet.

Ibec's new **SDG Hub** demonstrates Ibec's commitment to the Sustainable Development Goals, outlining our ongoing work towards each goal through collaboration with members, Government, enterprise and other stakeholders and to ensure their delivery by 2030.

[Click here.](#)



Trade & Supply Chain

As a small, open economy, Ireland is critically dependent on the free flow of global trade for its economic wellbeing.

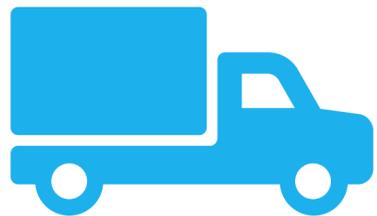
Ibec recommendations are:

- Ireland should support an ambitious EU trade agenda which promotes trade at multilateral and bilateral levels.
- Governments should support businesses efforts to better anticipate risks and minimise exposure to supply chain shocks and consult closely with the private sector in any efforts to advance national security interests and enhance open strategic autonomy.
- Predictable regulatory, trade and investment policy environment remain indispensable to alleviate uncertainty about the framework conditions in which global supply chains operate.
- Ireland should support measures to deepen the Single Market for goods and services across the EU and avoid all market renationalisation, protectionism, and fragmentation measures.
- The EU should seek to establish positive and stable relations, building on the EU-UK Trade and Cooperation Agreement as the retention of free access to the UK market remains of critical importance to Irish manufacturing.
- Relations with the US should remain a key priority in the EU's trade policy. Strong coordination and cooperation in the Transatlantic relationship is ongoing under the EU-US Trade and Technology Council where we seek concrete outcomes from the working groups and establish a regular dialogue with business.
- With regard to the temporary suspension of the trade tariff disputes in the aviation and steel sectors, it is important that permanent solutions are found to secure improved transatlantic relations.
- The export capability of indigenous Irish manufacturing can be further improved by introducing a State supported export credit insurance scheme to make up for the anticipated gap in the supply of such insurance in the market.
- Further funding for direct grant supports should be provided for innovation, marketing and trade promotion for firms building new markets.

Trade & Supply Chain (continued)

Harmonising regulations across the EU and beyond as much as possible is important to us. We would also like to see the process around geographic origin strengthened. Anything that supports open and fair trade is important to us as an industry on an island of 5 million people. We must export to survive.

Shed Distillery



Innovation and Skills

Innovation in manufacturing is changing people's lives, from smart communication technologies, digital health, new drug development and new food and diet solutions. Irish manufacturing is at the leading edge of this innovation, with an increasing number of global and European R&D centres locating here, with a strong focus on developing new opportunities for a digital future.

The availability of highly skilled people, and the ability to collaborate with third level gives confidence to global manufacturers to bring the world's most advanced technologies to Ireland.

Major technology disruptions and mega trends are changing the core activity of manufacturing. New technologies including autonomous transportation, 5G and next generation connectivity, digital health, Industry 5.0, smart energy, and immersive consumer experiences are transforming the way goods and services are produced and distributed.

The challenge is determining, developing, and deploying the skills that industry needs today and the new skills of the future.

Ibec recommendations are:

- Develop a national skills strategy for manufacturing. Identify the next generation skills required to support advanced manufacturing and invest in targeted supports and training programmes to ensure necessary pipeline of diverse talent
- The creation of a globally competitive innovation ecosystem
- Co-locating R&D and production is a strategic choice that enables many organisations to step up the value chain. Ireland's offering must remain internationally attractive to secure global innovation projects that have a positive net benefit to cost ratio for Ireland.
- Underpin the rollout of Impact 2030: Ireland's Research and Innovation Strategy with a commitment to increased multiannual investment in research and innovation to transform and drive innovation in the manufacturing sector.
- Create a network of innovation districts throughout Ireland and increase collaboration between key stakeholders in the innovation ecosystem to drive innovation activity.
- Support lifelong learning for the innovative manufacturing sector

Innovation and Skills (continued)

- Leverage the National Training Fund to support enterprise-led skills development.
- Close the €307 million funding gap in higher education to deliver a sustainable funding model for the sector
- Invest in skills relevant to business and increase investment in research in higher education.
- Create leadership programmes that deliver immersive innovation training to support industry and entrepreneurs to build an innovation culture, teams, and gain insight to emerging technologies.



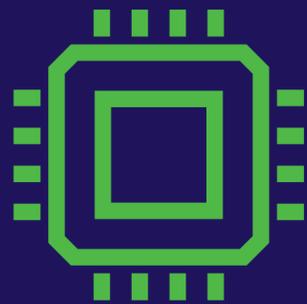
For the future, talent, and sustainability along with innovation remain top of the agenda for Thermo King Ireland. Innovation is vitally important, and we need to continue to attract talent.

Trane Technologies

Ibec's Smarter World, Smarter Work Campaign calls for reforms to position Ireland and the workplace for major labour market changes and new era of work.

Digital

Digital readiness matters. Our manufacturing is globalised, diverse, and smart. Digital and data-driven transformation is ‘integral to firms’ survival’, with more digitally advanced firms performing better than non-digital firms and better placed to cope with the disruption caused by the pandemic (European Investment Bank, 2022). While progress is being made, we must address gaps in the state and rate of our digital readiness. We recommend policy makers lead, safeguard and enable further digital and data enabled opportunities in manufacturing:



1. Lead.

- a. Work with partners to lead and shape EU governance and conditions impacting further digital transformation of our manufacturing.
- b. Actively engage industry and turn new policies, rules and targets to 2030 into clear trajectories, actions, and implementation. Report progress to support momentum.
 - i. Particular attention should be paid to supporting technology diffusion, skills development and training pathways, and research commercialisation.
 - ii. Ibec welcome the new overarching National Digital Strategy (NDS) and look forward to engaging further with Government in its implementation and related national AI and Industry 4.0 strategies.

2. Safeguard trust.

- a. Ireland must develop, co-ordinate and adequately resource national cybersecurity and regulatory capacities in expected digital regulation impacting advanced manufacturing.

3. Enable.

- a. Develop a National Platform to support advanced manufacturing by adapting the existing National Digital Manufacturing Portal for companies to build awareness of digital manufacturing concepts, highlight supports and foster partnerships.

Digital (continued)

Delivery of the national broadband plan needs to be accelerated.

- Administrative and planning delays to digital infrastructure should be addressed with priority being given to strategic physical and institutional infrastructure that supports advanced manufacturing.

Attract and retain mobile digital talent

- Reform of the visa and work permit processes must continue.

If we want to continue to be competitive, digitalisation is very important. That requires skillsets that include data analysis, automation, systems engineering and analytics.

Stryker

Taxation

Overview

There is still significant work to be done before there is a global agreement on a permanent structure for international corporation tax. Ibec continues to be supportive of the Government position that support for a global deal, ahead of unilateral measures across countries, is the best way to protect competitiveness. Ireland will continue to offer an attractive corporate tax regime, consistent with the OECD outcome. The key differentiator will be that the regime will be underpinned by certainty and stability.

We also have an opportunity is to maximise what we have within the construct of a new international tax settlement. Tax will be less central to our offering in the future, but it will still be a lever of competition. This can be achieved through significant simplification of any new regime rather than layering on top of existing provisions, maximising our world-beating R&D tax credit and other investment supports, improving our supports for the growth of indigenous manufacturers and ensuring our personal taxation regime remains attractive to high skilled workers.

R&D Tax Credit

The Irish R&D Tax Credit regime should be improved to make it best in class internationally.

- Significantly increase the €100,000 or 15% limit on qualifying outsourced expenditure to Third Level Institutions and the restrictions on outsourcing to related parties
- Both any OECD GLOBE agreement and any changes to the US GILTI or SHIELD will have to be studied carefully to ensure the R&D tax credits benefits can be maximised under any new global regime.
- A pro-forma R&D tax credit should be introduced to help smaller firms overcome administrative costs.

Corporation tax

- Ibec supports a move to a territorial system of taxation for Ireland on the basis that there are many wide-reaching policy benefits of such a move
- Accelerated capital allowances should be introduced for advanced manufacturing and should include investments in computerised and computer aided machinery and robotics.

Taxation (continued)

Founder and SME supports

- Good practice in recent years has seen the Department provide roadmaps and feedback statements of great value on the direction of Corporate Taxation. The same should be given for SME taxation outlining a series of changes over a three-year time horizon to include changes in CGT, EIS and other tax measures
- Increase the lifetime limit on capital gains entrepreneurs' relief to €15 million and expand the relief to passive investors in areas with high growth potential.
- The EIS is an important scheme for the sector. It should be maintained and further improved by increasing annual investment limits and implementing the recommendations of the Indecon review to allow losses on EIS investment for CGT purposes and any capital gains on the sale of shares taxed as capital gains rather than as income.



Ireland will continue to offer an attractive corporate tax regime, consistent with the OECD outcome. The key differentiator will be that the regime will be underpinned by certainty and stability.

Ger Brady, Chief Economist, Ibec

Regulation

In a rapidly evolving environment characterised by accelerating regulatory changes and increased competitive pressures, Ireland's manufacturing industry plays a key role in the wellbeing of our economy and society. It does this by ensuring their products meet all safety, health, and environmental protection requirements.

- It is vitally important that regulatory frameworks keep pace with new technologies in a way that facilitates and does not hinder innovation. Effective regulation therefore needs to be designed and executed in consultation with industry to create a more competitive and a safer environment.
- All new regulations should be critically assessed during development and then harmonised across the EU to avoid any negative impact on the business environment.



- Regulations are necessary, but they should be transparent and cost-effective. Regular auditing and sense testing of rules is required to eliminate outdated and inefficient policies before new legislation is introduced.
- In addition, regulators must be properly resourced and funded to implement and enforce new rules and standards and avoid undue delays in the introduction of new products to the market.

The medtech industry is a proven supporter of the EU Medical Device Regulation (MDR) goals and has invested significantly into the transition process. A fit for purpose EU regulatory system is needed to ensure continued patient and physicians' access to medtech

Sinead Keogh,
Head of Sectors and Director Ibec
Medtech & Engineering Sectors

About Ibec

Ibec is Ireland's largest lobby group and business representative. We campaign for real changes to the policies that matter most to business. Policy is shaped by our diverse membership, who are home grown, multinational, big and small and employ 70% of the private sector workforce in Ireland. With 39 trade associations covering a range of industry sectors, 6 offices around Ireland as well as an office in Brussels.

With over 270 employees, Ibec communicates the Irish business voice to key stakeholders at home and abroad. Ibec also provides a wide range of professional services and management training to members on all aspects of human resource management, occupational health and safety, employee relations and employment law.



Ibec Trade Associations

Representing your industry

Ibec understands that every business is different. There are the general issues which face all businesses operating in Ireland and then there are the issues specific to individual sectors or categories of the economy. To reflect the distinct interests of all our members, there are 39 business associations within the Ibec group. Ibec's trade associations identify and champion issues of importance to their respective members and provide great knowledge sharing, networking and training for all these industries.

Ibec's trade associations are strong brands in their own right and those that represent the manufacturing sector include:

- BiopharmaChem Ireland
- Irish MedTech Association
- Technology Ireland
- Engineering Industries Ireland
- Food Drink Ireland
- Drinks Ireland



#ManufacturinginIreland
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