



Life Sciences

Delivering for patients & enhancing
Ireland's competitiveness

The American Chamber of Commerce Ireland

The Voice of US-Ireland Business

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Contents

Key Recommendations	4
Foreword	6
National Strategic Importance of the Life Sciences Sector	8
Why Ireland Matters	10
RD&I Excellence & Global Leadership	13
Patient Access & Clinical Trials	14
Talent, Skills & Workforce Resilience	16
Integrated Life Sciences Ecosystem	18
Manufacturing, Infrastructure and Sustainability	19
Ireland's Role in Europe & Global Competitiveness	20
Conclusion	21

Key Recommendations:

National Strategic Importance of the Life Sciences Sector:

- Enhance Ireland as a location for clinical research and advance a fully digitalised healthcare system.
- Champion the importance of a strong IP environment at European level.
- Introduce measures to support the triaging of applications for critical infrastructure projects.
- Address housing and cost-of-living constraints impacting talent attraction and retention.

Why Ireland Matters:

- Position Ireland to remain a global leader in life sciences innovation, manufacturing and patient impact over the coming decade.
- Formally designate life sciences as a strategic national asset within Ireland's competitiveness and productivity framework.
- Explicitly align the National Life Sciences Strategy with the Action Plan on Competitiveness and Productivity.
- Adopt a whole-of-Government delivery model, spanning enterprise, health, education, infrastructure, digital and climate policy.

RD&I Excellence & Global Leadership:

- Encourage convergence between life sciences and adjacent high-tech sectors, including AI, data analytics, advanced manufacturing and digital platforms.
- Use Ireland's EU Council Presidency and ongoing EU engagement to influence life sciences, digital health and biotech regulation.
- Prioritise early-stage discovery science, translational research and commercialisation, alongside manufacturing excellence.

Patient Access & Clinical Trials:

- Design, govern, resource, and operate the medicines pricing and reimbursement system to ensure compliance with statutory timelines for decision-making on reimbursement of new medicines.
- Expand programmes which foster collaboration between multinationals, researchers and academia.
- Deliver formalised benchmarking processes for cyber security to ensure Ireland meets and maintains global best practice standards.

Integrated Life Sciences Ecosystem:

- Maintain and enhance Ireland's R&D tax credit regime to remain internationally competitive.
- Reduce administrative barriers to accessing R&D supports and improve certainty for investors.
- Evaluate the benefit of modernising health technology assessment methodologies to reflect the full value of innovation.
- Improve predictability and transparency in pricing and reimbursement decision-making through adherence to statutory timelines.
- Develop a national, government-supported early access pathway that is commercially viable, enables real-world evidence collection, and operates explicitly as a bridge to a sustainable long-term reimbursement decision.

Talent, Skills & Workforce Resilience:

- Streamline and enhance immigration pathways for highly skilled international talent.
- Prioritise the investment in STEM education in secondary level schools in tandem with strategic investment in secondary school infrastructure.
- Address housing and cost-of-living constraints impacting talent attraction and retention.
- Implement a co-ordinated national skills strategy for life sciences aligned with industry needs.

Manufacturing, Infrastructure & Sustainability:

- Provide clarity with regard to timelines for planning applications given the importance of such timelines for investor confidence.
- Prioritise the delivery of critical road infrastructure to support balanced regional development.
- Accelerate planning and permitting processes for strategic manufacturing projects.
- Prioritise delivery of energy, water, wastewater, grid and planning infrastructure critical to life sciences investment.

Ireland's Role in Europe & Global Competitiveness:

- Enhance Ireland as a location for clinical research and advance a fully digitalised healthcare system.
- Protect and enhance Ireland's position as a digital regulatory hub within the EU.

Foreword

With a rich history of innovation, a thriving ecosystem, and a talented workforce, Ireland has firmly established itself as a global powerhouse in the life sciences sector, attracting some of the world's most prestigious pharmaceutical, MedTech and biotechnology companies.

The life sciences sector, in the Irish context, has experienced remarkable growth over the past decades, supported by the implementation of pro-enterprise policies by consecutive Governments. This has enabled Ireland to position itself as a prime location for the life sciences sector, now boasting an impressive concentration of industry leaders, with 19 of the top 20 global pharmaceutical companies and 18 of the top 20 medical device companies maintaining a presence in Ireland.

This has proved transformative in terms of Ireland's manufacturing capabilities, as 127 medical device manufacturing facilities and 109 pharmaceutical manufacturing facilities now operate across the country. Regional locations such as Cork and Galway have emerged as hubs for life sciences, attracting a diverse array of multinational businesses and fostering a thriving ecosystem of innovation and collaboration.

Notwithstanding, global competition for investment, talent, and innovation is intensifying, and geopolitical shifts, EU regulatory reform, and rapid technological advances are reshaping the pharmaceutical and MedTech landscape. These factors, if neglected, have the potential to impact Ireland's competitiveness as a destination of choice for the life sciences sector.

In line with the Government's 2025-29 Programme for Government, a whole-of-government Action Plan on Competitiveness and Productivity has been delivered, acknowledging that improving competitiveness and productivity is critical to Ireland's ability to sustain economic resilience and attract high value investment. Successful implementation, and ongoing review of this plan will be key in supporting Ireland's capacity to compete effectively on the global stage over the next decade.

This White Paper proposes a bold national mission to position Ireland as the most dynamic and innovative life sciences ecosystem in Europe, combining industry leadership, research excellence, rapid patient access to innovation, talent and workforce development, digital health transformation and proactive international engagement. It integrates the Government's competitiveness commitments with industry-based insights from AmCham and others, aligning public policy with the strategic needs of the life sciences sector.

The overarching vision articulated in this paper would see Ireland become the most attractive, innovative and responsive life sciences location in Europe. This requires the delivery of an environment where cutting-edge research thrives, clinical trials are initiated swiftly, manufacturing remains globally competitive, digital health and data serve as enablers for innovation, and regulatory processes facilitate, rather than hinder, progress. It also necessitates the embedding of a culture of continuous improvement in productivity and competitiveness across the broader economy to ensure the life sciences sector can flourish in a rapidly evolving global landscape.



National Strategic Importance of the Life Sciences Sector

Ireland's life sciences sector is a foundational pillar of the national economy, exemplifying the success of a small, open economy that has harnessed FDI, advanced manufacturing capability and research excellence to become a globally recognised hub for pharmaceuticals, medical technology and digital health. Ireland's economic model has historically prioritised openness, enterprise attraction and integration into global value chains. Life sciences companies have played a central role in this model by driving innovation, fostering high-skilled employment and stimulating inward investment.

The presence of global pharmaceutical and medical technology leaders in Ireland has not only bolstered manufacturing excellence but also contributed to research investment, STEM employment and integration with education and clinical research institutions across the country.

US multinational companies alone directly employ nearly 245,000 people in Ireland, illustrating that Ireland is viewed positively as a location for investment and growth. However, in recent AmCham member surveys, respondents have consistently emphasised that addressing competitiveness, infrastructure, skills, and innovation ecosystems is essential if Ireland is to maintain and deepen this role amid intensifying global competition.

Pharmaceuticals, MedTech, and associated digital health technologies are not simply industries, they are strategic national assets. Ireland's future competitiveness depends on its ability to sustain and evolve this ecosystem in an increasingly complex global environment. The next decade will determine whether Europe, and Ireland, remains a global leader in life sciences or cedes ground to more agile competitors.

Despite these successes, Ireland's life sciences system risks stagnation without coherent and coordinated policy action. Clinical trial set-up times remain protracted relative to emerging competitor nations such as the United Kingdom and Singapore, which are implementing reforms to reduce trials approval timelines by more than two thirds to attract industry investment. It is imperative that Ireland develops a regulatory framework that is agile and robust in order to remain competitive in the global race for innovation. Key to this will also be aiming for ambitious improvements to the clinical research environment at European level, specifically the Biotech Act which will be a live policy file during the EU presidency.

AmCham recommends:

- Enhance Ireland as a location for clinical research and advance a fully digitalised healthcare system.
- Champion the importance of a strong IP environment at European level.
- Introduce measures to support the triaging of applications for critical infrastructure projects.
- Address housing and cost-of-living constraints impacting talent attraction and retention.



Why Ireland Matters

Ireland continues to be a stable, secure, and pro-enterprise environment and ranks favourably relative to many competitor jurisdictions as a place to do business. Ireland's position as a common-law, English-speaking gateway to the EU and beyond is attractive for inward investment and Ireland remains the fastest growing economy in the Eurozone.¹

Ireland also offers attractive EU state aid-compliant grant incentives for biopharma companies to build sustainable facilities in the country, upskill staff, invest in digitalisation and upgrade their operations. This is in addition to the recently enhanced R&D Tax credit regime (35%). Given the cascading benefits to the life sciences sector, as well as the overall economy, there is real potential to increase this credit as part of future Budget negotiations.

Importantly, the credit should better reflect how R&D is delivered in a small, high-cost economy, which could be achieved by removing/relaxing caps on eligible outsourced R&D spend and enabling eligibility for related-party R&D costs where the Irish entity is the principal IP owner and directs/manages the R&D programme.

Over the past 40 years, Ireland has transformed itself into one of Europe's top ten innovation nations. The country is classed as a 'strong innovator' Member State in the 2025 European Innovation Scoreboard, which provides an analysis of innovation performance in EU countries. Ireland also has an established research base in life sciences, with notable global strengths in immunology, genetics, and data analytics.

Ireland's life sciences industry is advantageously positioned near other high-tech, digital-based industries that have attracted large-scale global investments. The presence of multinational corporations (MNCs) and indigenous companies in high-tech sectors such as software engineering and cloud, microelectronics and chip manufacturing, data analytics, high-performance computing, artificial intelligence (AI), and robotics, offers excellent opportunities for convergence and partnership activities among leading companies in Ireland. Ireland must actively shape EU regulatory frameworks to support innovation, rather than merely adapt to them.

This includes championing adaptive regulatory approaches for generative AI, large language models in healthcare and advanced digital platforms, as highlighted by global calls for regulatory science innovation in AI-enabled health technologies.. Strategic engagement during Ireland's EU Council Presidency also offers the opportunity to influence the future direction of EU life sciences policy and strengthen integration with broader European markets.

¹ <https://www.idaireland.com/why-companies-choose-ireland/ireland-s-economy>

In the short-term, Ireland can build on its geopolitical stability and good reputation to reinforce its resilience and stability with US firms who may be concerned about foreign supply chain risk. Medium-term investment in cross-sector training and national skills standards means that Ireland will remain competitive in the rapidly changing world market. A glimpse into the future sees a clear potential to make Ireland a biopharma centre of sustainable production, not only on the environmental front, but also in building strong, agile operations sensitive to worldwide demand.

A whole-of-Government approach is vital to drive progress in the implementation and execution of actions to enhance Ireland's global competitiveness. National strategies focused on fostering innovation, talent development and supporting sustainable economic growth, already being implemented by Irish government agencies IDA Ireland, Enterprise Ireland (EI), and Research Ireland play a pivotal role in strengthening Ireland's global competitiveness. Furthermore, Ireland's Action Plan on Competitiveness and Productivity contains policy recommendations to government, ensuring Ireland can adapt to evolving market challenges.

With more than €15 billion in FDI in biopharma over the past decade, the employment of more than 50,000 people, and exports of more than €100 billion, Ireland ranks among the world's top life sciences manufacturing hubs. These measures should be delivered through the whole-of-Government adoption of an ambitious Life Sciences Strategy, one that aligns national stakeholders across health, enterprise, research, and education, and positions Ireland to actively shape EU biopharma and biotech policy.

Ireland's biopharma future will be marked by leadership, collaboration, and innovation. With decisive, collective action, Ireland can use its excellent foundation to shape the future of global biopharma, create high-value employment, drive sustainable economic growth, and deliver life-saving medicines to patients around the world.

AmCham recommends:

- Position Ireland to remain a global leader in life sciences innovation, manufacturing and patient impact over the coming decade.
- Formally designate life sciences as a strategic national asset within Ireland's competitiveness and productivity framework.
- Explicitly align the National Life Sciences Strategy with the Action Plan on Competitiveness and Productivity.
- Adopt a whole-of-Government delivery model, spanning enterprise, health, education, infrastructure, digital and climate policy.



RD&I Excellence & Global Leadership

Ireland's approach must evolve from passive compliance with international norms to proactive global leadership. The overarching mission proposed in this paper is to make Ireland the most dynamic and innovative life sciences ecosystem in Europe, characterised by rapid access to breakthrough therapies, world-leading research and development capacity, advanced manufacturing excellence, and a digitally connected health system that fosters real-world evidence generation and personalised care.

A sustainable life sciences future requires deep anchoring in discovery science, translational research, and the commercialisation of breakthrough technologies. Ireland's strengths in manufacturing must be complemented by a sharpened focus on drug discovery, biologics, orphan drugs and innovative medicines, advanced therapies and digital therapeutics.

The strategic expansion of research centres, enhanced support for collaborative research between academia, industry and the health system, and targeted incentives for R&D investment will be essential. Nationwide digital transformation of healthcare delivery and research capability is essential. A fully interoperable digital health ecosystem will enable real-world evidence generation, personalised care pathways, AI-driven research and novel health interventions. Ireland's commitment to digital infrastructure must extend to health data spaces aligned with European frameworks, ensuring secure, ethical and patient-centric data use.

AmCham recommends:

- Encourage convergence between life sciences and adjacent high-tech sectors, including AI, data analytics, advanced manufacturing and digital platforms.
- Use Ireland's EU Council Presidency and ongoing EU engagement to influence life sciences, digital health and biotech regulation.
- Prioritise early-stage discovery science, translational research and commercialisation, alongside manufacturing excellence.

Patient Access & Clinical Trials

Ireland's current medicines access performance has significant scope for improvement. Slow reimbursement processes have left Irish patients waiting far longer than statutory timelines for access to lifesaving treatments that are available elsewhere in Europe. The Government's commitment to achieving the 180-day timeline for HSE decisions is welcome but reform of the health technology assessment, pricing and reimbursement processes and stronger alignment with European early access frameworks, are required to ensure that Ireland is seen as a priority for innovative treatments.²

The priority in the coming years should be a focus on implementing the new Framework Agreement commitments on pricing and reimbursement system reform and adhering to statutory timelines for decision-making. In terms of HTA modernisation, there is always scope to work with industry stakeholders to develop methodologies that reflect the full societal and clinical benefits of innovation. This may include a dedicated assessment pathway for orphan medicines to account for severity, rarity, unmet need, limited alternatives, and broader societal value (including non-medical costs).

Clinical research infrastructure must be modernised to reduce administrative friction and accelerate study initiation. Streamlining ethical approvals, enhancing regulatory coordination, and integrating research into routine healthcare delivery will make Ireland a more attractive destination for multinational and investigator-initiated clinical trials. Investment in national digital infrastructure to support secure, high-quality data access and interoperability, will further solidify Ireland's appeal as a clinical research hub.

The attractiveness of Ireland as a location for clinical research has been hindered by protracted approval processes and fragmented infrastructure. A modern clinical research environment requires integrated ethical and regulatory frameworks, streamlined governance, and investment in digital and data infrastructure, that enables secure and efficient trial conduct.

Timely patient access to innovative medicines and technologies is both a moral imperative and a marker of national competitiveness. AmCham welcome the recent conclusion of two new Framework Agreements on the supply and pricing of medicines and more needs to be done to ensure that access to medicines for patients, security of supply, reducing shortages and safeguarding the health service.

Data from the European Federation of Pharmaceutical Industries and Associations (EFPIA) highlights the ongoing challenges of providing equal access to medicines for all Europeans. The W.A.I.T. Indicator provides a comprehensive analysis of 173 new medicines approved between 2020 and 2023. In 2024, using the EU average across 27 member states, the data shows that average time from approval to patient access has now reached 578 days.

² <https://www.ipha.ie/new-ipha-framework-agreement-to-accelerate-patient-access-and-drive-investment-in-innovative-medicines/>

³ [efpia-patients-wait-indicator-2024-final-110425.pdf](#)

AmCham recommends:

- Design, govern, resource, and operate the medicines pricing and reimbursement system to ensure compliance with statutory timelines for decision-making on reimbursement of new medicines.
- Expand programmes which foster collaboration between multinationals, researchers and academia,
- Deliver formalised benchmarking processes for cyber security to ensure Ireland meets and maintains global best practice standards.



Integrated Life Sciences Ecosystem

Ireland must substantially elevate its research and development system from a model predominantly based on manufacturing support toward one that also anchors early-stage innovation, discovery science and translational research. The life sciences ecosystem must integrate industry and academic partnerships with the health system to accelerate the development of novel therapies, advanced biologics and digital health innovations.

Government commitments to enhance R&D competitiveness through incentives and collaborative frameworks must be reinforced by targeted policies to further expand funding, reduce administrative barriers and foster university-industry cooperation.

AmCham's advocacy consistently highlights the need to enhance R&D tax credits and deepen collaboration between third level institutions and industry. The AmCham 2026 budget submission, for example, calls for a strengthened R&D tax incentive regime that supports innovation and underlines the importance of maintaining Ireland's position as a regulatory hub within the EU. These positions align with broader competitiveness goals in the Programme for Government and Action Plan on Competitiveness and Productivity, which emphasise innovation, productivity and investment in research infrastructure.

Timely patient access to innovative medicines and technologies is both a moral imperative and a marker of national competitiveness. Where delays in reimbursement and access occur, Ireland risks not only poorer health outcomes but also a diminished reputation as a priority market for global launch strategies.

AmCham recommends:

- Maintain and enhance Ireland's R&D tax credit regime to remain internationally competitive.
- Reduce administrative barriers to accessing R&D supports and improve certainty for investors.
- Evaluate the benefit of modernising health technology assessment methodologies to reflect the full value of innovation.
- Improve predictability and transparency in pricing and reimbursement decision-making through adherence to statutory timelines.
- Develop a national, government-supported early access pathway that is commercially viable, enables real-world evidence collection, and operates explicitly as a bridge to a sustainable long-term reimbursement decision.



Talent, Skills & Workforce Resilience

A resilient life sciences sector depends on a robust pipeline of skilled professionals. Ireland must prioritise the development of talent in areas such as regulatory science, data analytics, AI, bioinformatics and advanced manufacturing and clinical research.

Addressing skills shortages requires coordinated policy action spanning education, immigration pathways and lifelong learning. Education systems must align curricula with industry needs, and lifelong learning pathways must be supported. Ireland's historically strong STEM graduate base provides a foundation upon which to build, but ongoing investment in upskilling, reskilling and postgraduate training is necessary to sustain competitiveness.

AmCham's advocacy for improved immigration pathways reflects the sector's reliance on global talent and the need for faster, more streamlined processes to support project delivery and innovation capacity. Creating an environment where international talent can settle and thrive will reinforce Ireland's competitive position and support sector expansion.

AmCham recommends:

- Streamline and enhance immigration pathways for highly skilled international talent.
- Prioritise the investment in STEM education in secondary level schools in tandem with strategic investment in secondary school infrastructure.
- Address housing and cost-of-living constraints impacting talent attraction and retention.
- Implement a co-ordinated national skills strategy for life sciences aligned with industry needs.



Manufacturing, Infrastructure and Sustainability

Ireland's leadership in biopharmaceutical and MedTech manufacturing must be future-proofed through strategic investment in next-generation modalities such as cell and gene therapies, RNA platforms and personalised medicine manufacturing.

Efficient infrastructure delivery, including energy, utilities and planning systems, is critical to securing new investment and sustaining current facilities. The Government's Action Plan on Competitiveness and Productivity identifies infrastructure delivery and regulatory reform as central to national competitiveness, reinforcing that the life sciences ecosystem will benefit from broader improvements in delivery capacity, cost control and regulatory efficiency.

AmCham recommends:

- Provide clarity with regard to timelines for planning applications given the importance of such timelines for investor confidence.
- Prioritise the delivery of critical road infrastructure to support balanced regional development.
- Prioritise delivery of energy, water, wastewater, grid and planning infrastructure critical to life sciences investment.
- Accelerate planning and permitting processes for strategic manufacturing projects.



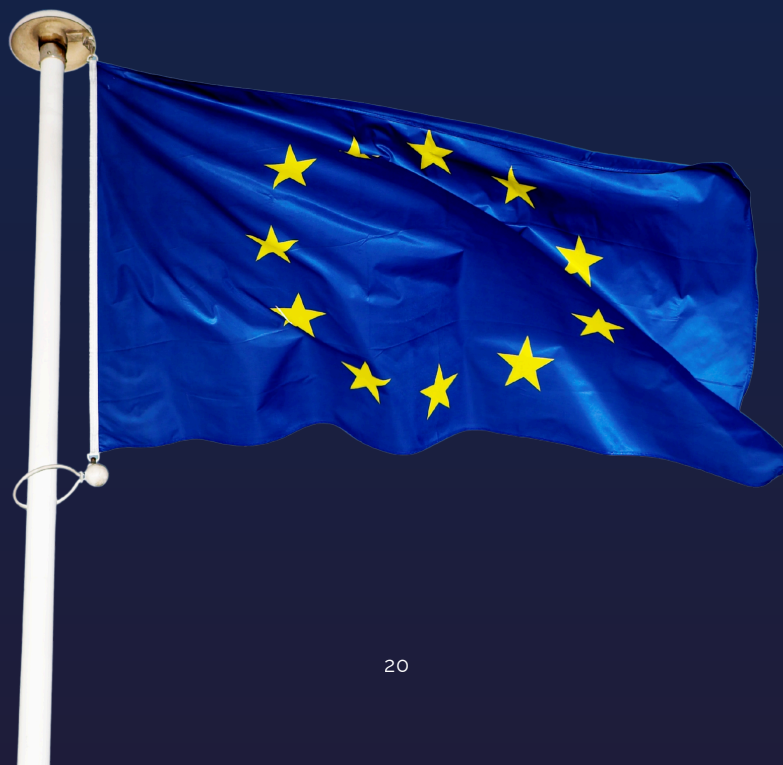
Ireland's Role in Europe & Global Competitiveness

A digitised health system is essential for research, patient care and economic competitiveness. Ireland must accelerate the deployment of fully interoperable electronic health records and real-world evidence platforms that support advanced analytics and AI-driven research. Aligning digital health development with European initiatives, including the EU Health Data Space, will enhance Ireland's position as a digital health innovation hub and enable secure, patient-centric data use for research and care delivery.

Ireland must transition from passive alignment with EU regulatory frameworks to proactive leadership that shapes policy environments favourable to innovation. The Government's recognition of the centrality of competitiveness to national prosperity, as articulated in the Programme for Government and associated Action Plan, underscores the need for Ireland to assert its voice in shaping European research funding, regulatory standards and international partnerships. Engagement during Ireland's EU Council Presidency and beyond presents opportunities to influence agendas that affect the life sciences sector, including digital policy, trade and EU research frameworks.

AmCham recommends:

- Enhance Ireland as a location for clinical research and advance a fully digitalised healthcare system.
- Protect and enhance Ireland's position as a digital regulatory hub within the EU.



Conclusion

In a pivotal moment for a sector that employs around 100,000 people in Ireland and delivers close to €100 billion in exports annually, the Department of Enterprise, Tourism and Employment (DETE) recently conducted a public consultation on shaping Ireland's planned new National Life Sciences Strategy. The delivery of a national strategy for life sciences will be essential to bolster Ireland's globally competitive position, grounded in its existing "strong competitive advantage" in the areas of pharma and MedTech.

Ireland's future competitiveness in life sciences rests on its ability to translate strategic ambition into sustained policy action. The sector's contributions to employment, export performance and innovation are a testament to Ireland's success as an open, investment-oriented economy. Yet significant challenges in access, infrastructure, talent and regulatory agility must be overcome. By integrating the Government's commitments on competitiveness and productivity with sector-specific strategic interventions, Ireland can secure its place as a global leader in life sciences innovation, manufacturing and patient impact, delivering economic and societal benefits for decades to come.

Additional risks to the sustainability of the Irish life sciences sector include infrastructure limitations, such as issues with water, wastewater, energy grids, and the ever-present issue of the dysfunctional housing market. These factors may affect Ireland's capacity to attract new investment and maintain current businesses. It is hoped that these limitations will be mitigated by the recently announced €200 billion National Development Plan (NDP). This represents the most ambitious investment programme in the State's history. A cross-government delivery structure with senior accountability is required to drive implementation. This structure must integrate policy development, regulatory reform, public investment, industry engagement and academic collaboration.

Successive governments have often demonstrated strong policy intent and significant effort. However, effort alone does not equate to results. The absence of structured performance accountability metrics has contributed to delays. Accountability rests on tangible and clear KPI's with measured goals and objectives delivered within the published timeframes.

Transparent governance mechanisms with clear milestones, performance indicators and regular reporting will ensure sustained focus and progress. Delivering on this national mission requires a governance architecture capable of integrating cross-government policy, industry engagement and accountability. Clear ownership of actions, transparent milestones, metrics for success and regular public reporting will ensure that strategic commitments become tangible outcomes.



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