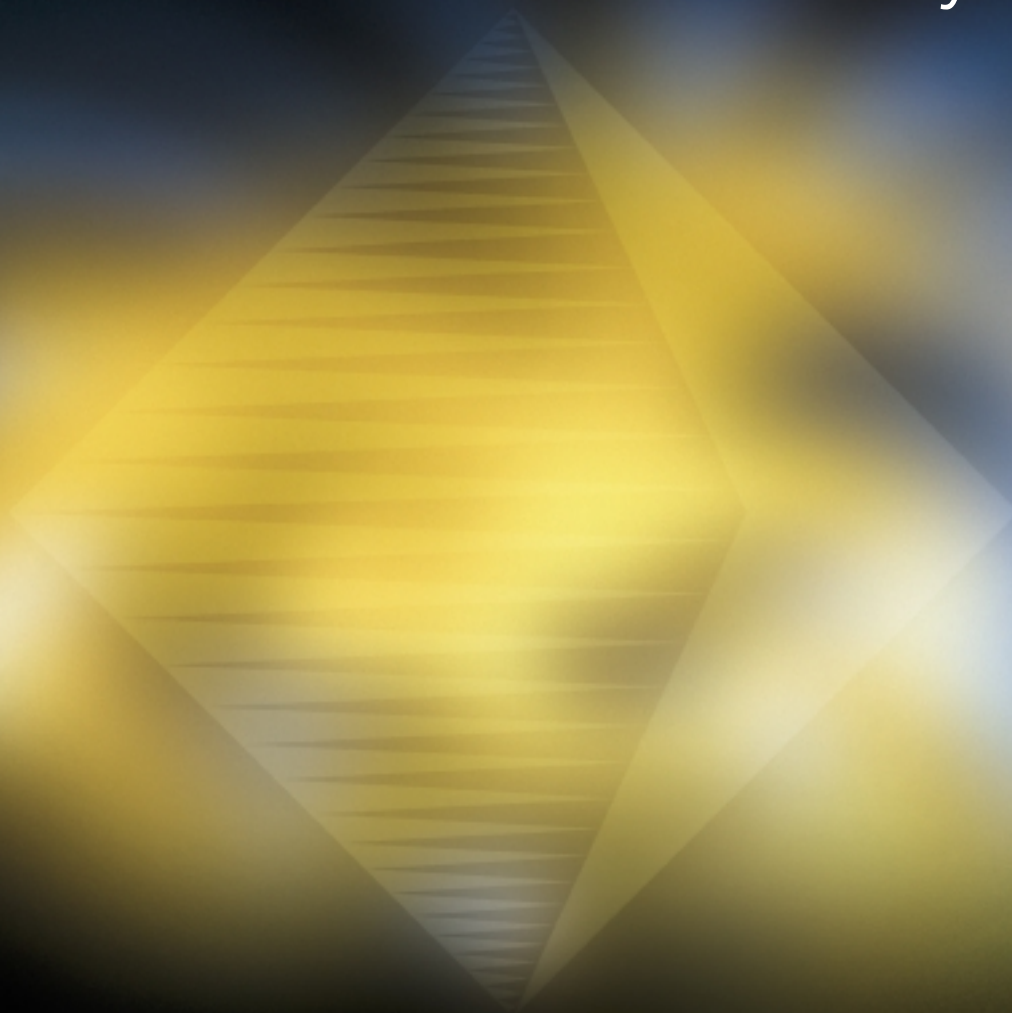


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Annual Employment Survey 2002

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Annual
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Survey 2002



Annual Employment Survey 2002

September 2003

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Introduction

This document sets out the final results of the 2002 Annual Employment Survey¹. The survey is an annual census of employment in all known manufacturing, internationally traded and financial services and other service companies supported by the Agencies, and has been carried out each year since 1973.

Forfás, in line with its mandate to co-ordinate the activities of Enterprise Ireland and IDA Ireland continues to carry out the survey with the co-operation of Enterprise Ireland and IDA Ireland regional staff. Shannon Development carry out the survey for companies falling within its remit (Irish-owned companies in the Mid-West region and foreign-owned companies in the Shannon Zone) and provide the results for incorporation in the Forfás database. Similarly, Údarás na Gaeltachta carries out the survey for client companies in its portfolio and provides the results for inclusion in the Forfás database.

The survey results analysed in Section 1 include the manufacturing and internationally traded/financial services and other service employment of Enterprise Ireland, IDA Ireland, Shannon Development and Údarás na Gaeltachta and cover the period 1993-2002. Historic employment figures differ from those previously reported due to factors such as the inclusion of new companies, transfer of ownership and/or transfers within Agencies.

Data on part-time, temporary and short-term contract employment is also provided for companies within the remit of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta. Shannon Development currently does not collect data on 'non-permanent' forms of employment.

Section 2 provides comparative international employment trend data.

Section 3 (and Appendices 1 and 2) provides a regional analysis of permanent full-time employment and part-time temporary and short-term contract employment.

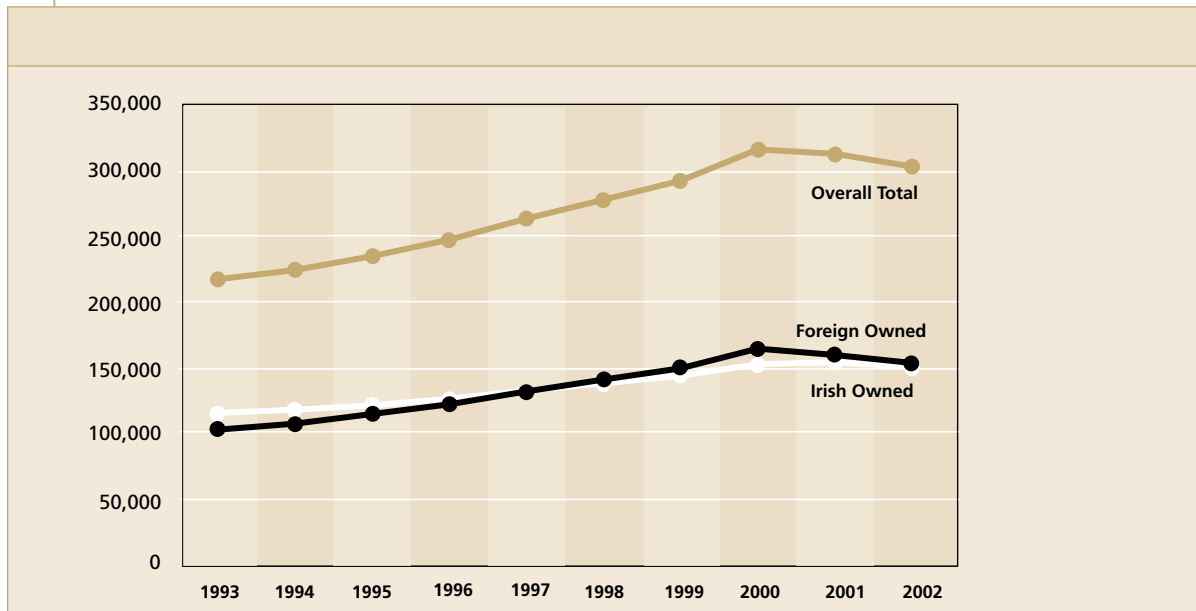
Section 4 (and Appendices 3 and 4) analyses sectoral trend data for permanent full-time and part-time temporary and short-term contract employment.

¹ *An overview of this survey, together with the methodology and definitions used for each employee category is provided in Appendix 5*

1

Survey Results – Employment Trends 1993-2002

Chart 1 : *Trends in Permanent Full-time Employment 1993-2002
Overall Irish and Foreign Components
IDA Ireland, Enterprise Ireland², Shannon Development
& Údarás Na Gaeltachta*

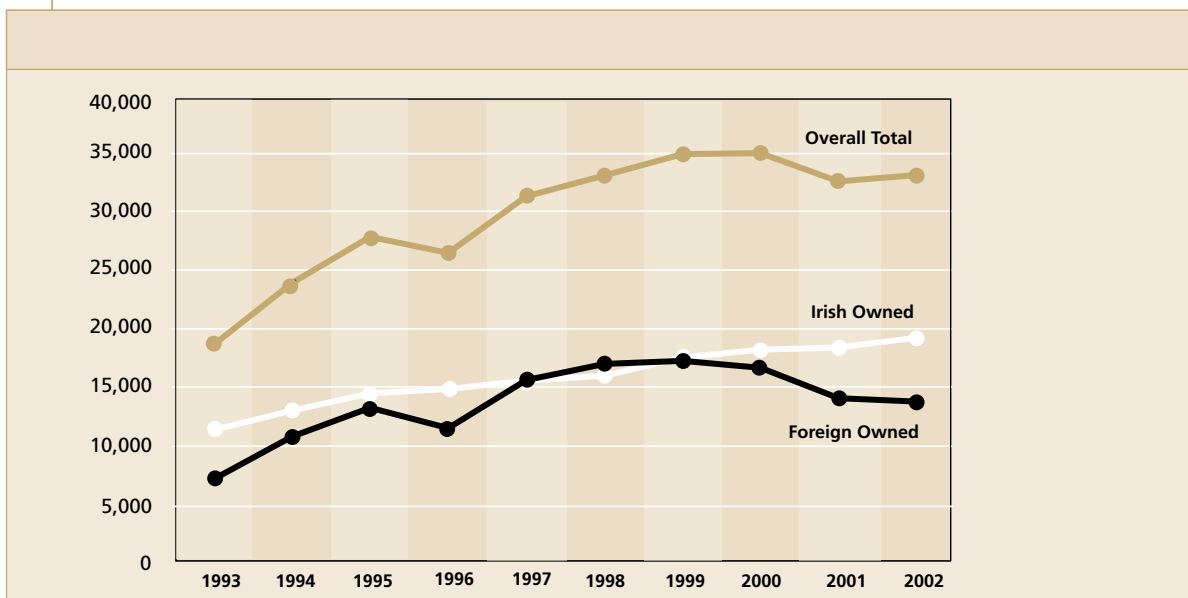


	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	217,402	224,436	235,099	247,679	263,776	278,294	292,844	316,746	313,456	303,707
Irish Owned	115,112	117,549	120,836	125,998	132,217	137,648	143,576	152,410	153,988	150,349
Foreign Owned	102,290	106,887	114,263	121,681	131,559	140,646	149,268	164,336	159,468	153,358

- ▶ Overall permanent full-time employment (i.e. for manufacturing, internationally traded and financial services and other activities supported by the agencies increased by 86,305 (39.7%) over the ten year period 1993-2002. In 2002, total permanent full-time employment amounted to 303,707, a decrease of 9,749 (-3.1%) over 2001.
- ▶ In 2002, foreign-owned companies recorded a decrease in full-time employment of 6,110 (-3.8%) over 2001.
- ▶ In 2002, Irish-owned companies recorded a decrease in full-time employment of 3,639 (-2.4%) over 2001.
- ▶ Over the past ten years, permanent full-time employment in foreign-owned companies grew by 51,068 (49.9%) with employment in Irish-owned companies increasing by 35,237 (30.6%).
- ▶ Permanent full-time employment in foreign-owned companies now accounts for 50.5% of total employment in manufacturing, internationally traded and financial services and other activities supported by the agencies compared with 50.9% in 2001 and 47.1% in 1993.

² Former Client companies under the remit of Forbairt

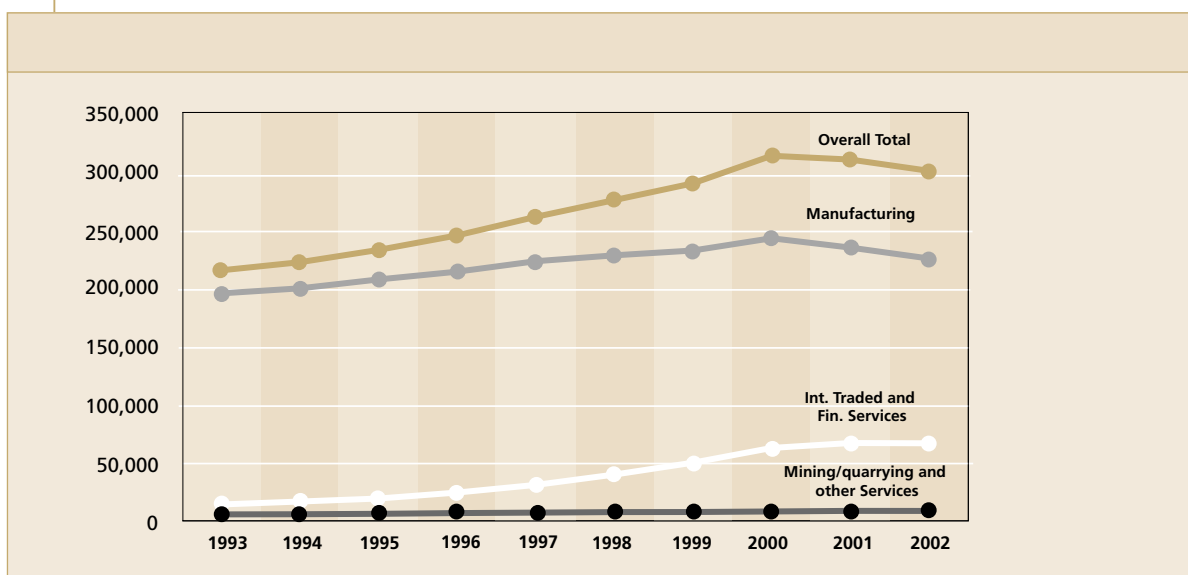
**Chart 2 : Trends in Part-time, Temporary and Short-Term Contract Employment
1993-2002**
Overall Irish and Foreign Components
IDA Ireland, Enterprise Ireland & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	18,678	23,911	27,827	26,461	31,274	33,045	34,861	34,941	32,541	33,085
Irish Owned	11,428	13,060	14,526	14,892	15,620	16,019	17,572	18,243	18,425	19,260
Foreign Owned	7,250	10,851	13,301	11,569	15,654	17,026	17,289	16,698	14,116	13,825

- ▶ Part-time, temporary and short-term contract employment rose by 77.1% over the ten year period 1993-2002. Employment in these categories increased by 1.7% in 2002. This follows a decline of 6.9% in 2001. The only other year in which a decline in this form of employment occurred was 1996 (-4.9%). The decline in 2001, in this type of employment was entirely attributable to the foreign-owned sector, reflecting the decrease in full-time employment which also occurred in these companies in 2001. The decline in 1996 was mainly attributable to employees in this category moving into permanent employment in a number of companies in the foreign-owned electronics sector, reflecting the increased tightening/skills shortages in the labour market for highly skilled personnel.
- ▶ Employment in this category in Irish-owned companies grew by 7,832 (68.5%) over the 1993-2002 period, showing an increase in each year to reach 19,260 jobs in 2002. An increase of 835 jobs (4.5%) was recorded in 2002.
- ▶ Employment in this category in foreign-owned companies grew by 6,575 (90.7%) over the 10 year period 1993-2002. A decline occurred in 2002 (-2.1%). This follows a significant decline of 15.5% in 2001.

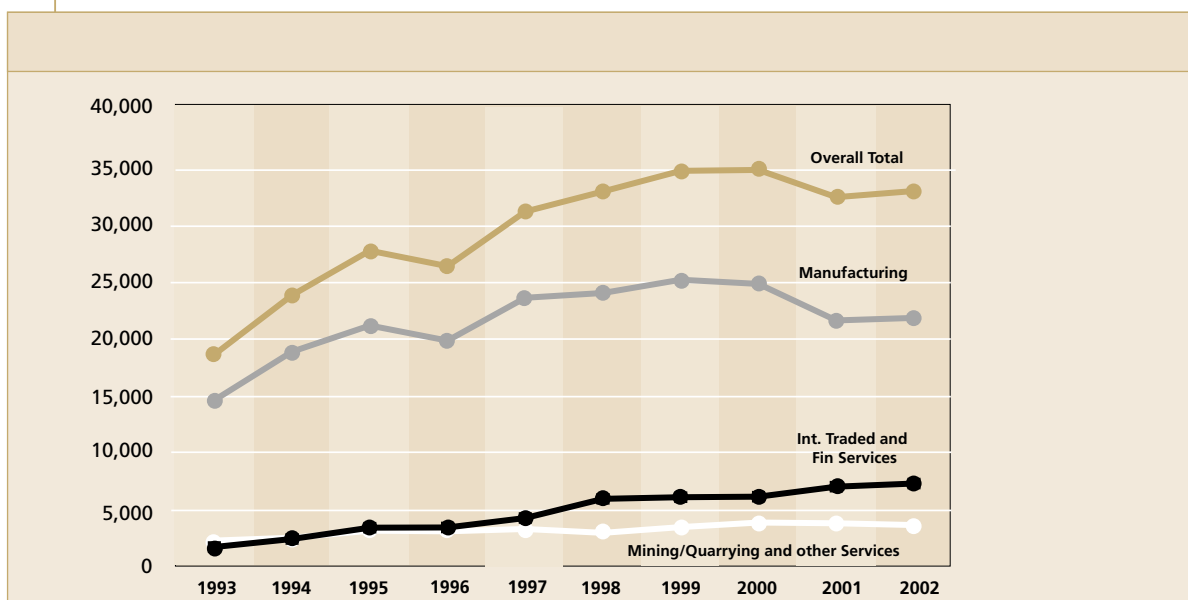
Chart 3: Trends in Permanent Full-time Employment 1993-2002
Manufacturing/Internationally Traded and Financial Services/Other Activities
 IDA Ireland, Enterprise Ireland, Shannon Development &
 Údarás Na Gaeltacht



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	217,402	224,436	235,099	247,679	263,776	278,294	292,844	316,746	313,456	303,707
Manufacturing	197,413	201,759	209,475	216,216	225,287	230,397	234,571	245,208	237,119	227,666
Int. Traded and Fin. Services	14,299	16,851	19,444	24,640	31,261	40,221	50,529	63,316	67,598	67,359
Mining/Quarrying and Other Services	5,690	5,826	6,180	6,823	7,228	7,676	7,744	8,222	8,739	8,682

- Over the ten year period 1993-2002, permanent full-time manufacturing employment has risen from 197,413 in 1993 to 227,666 in 2002, an increase of 30,253 jobs (15.0%). In 2002, there was a decline of 9,453 jobs (-4.0%). This follows a decline of 8,089 (-3.3%) in 2001, the first year a decline occurred during the ten year period. Manufacturing employment stood at 245,208 in 2000, the highest recorded level of manufacturing employment in the past ten years.
- Permanent full-time employment in internationally traded and financial services companies displayed consistent growth from 14,299 in 1993 to 67,598 in 2001, a rise of 371.1%. A small decline occurred in 2002 (-0.4%). The rise over the 10 year period (371.1%) accounted for 53,060 (61.5%) of the rise in total employment in manufacturing and internationally traded and financial services companies of 86,305 over the ten year period 1993-2002.

**Chart 4 : Trends in Part-time, Temporary and Short-Term Contract Employment³
1993-2002**
Manufacturing/Internationally Traded and Financial Services/Other Activities
IDA Ireland, Enterprise Ireland & Údarás Na Gaeltachta

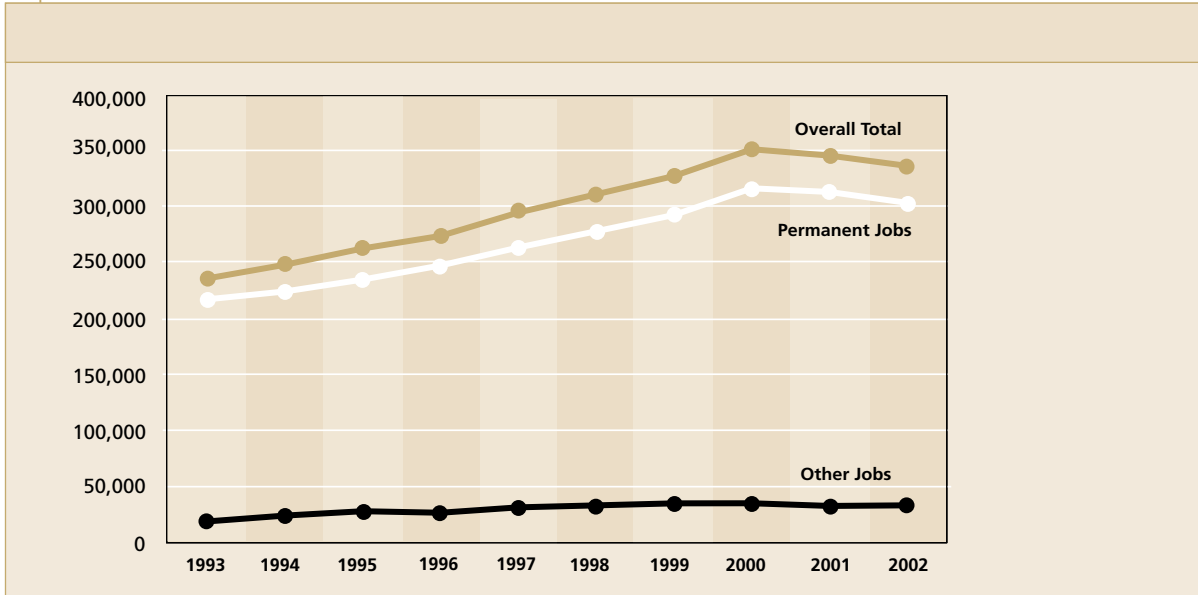


	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	18,678	23,911	27,827	26,461	31,274	33,045	34,861	34,941	32,541	33,085
Manufacturing	14,660	18,933	21,236	19,905	23,680	24,103	25,269	24,900	21,684	21,907
Int. Traded and Fin. Services	1,725	2,433	3,429	3,448	4,280	5,969	6,112	6,159	7,041	7,317
Mining/Quarrying and Other Services	2,293	2,545	3,162	3,108	3,314	2,973	3,480	3,882	3,816	3,661

- ▶ Part-time, temporary and short-term contract employment in manufacturing grew by 49.4% (7,247 jobs) over the 1993-2002 period. Employment in this category peaked in 1999 at 25,269 jobs and in the following year (2000) declined marginally by 1.5% to 24,900 jobs. In 2001, a significant decline (-12.9%) was recorded. In 2002, a marginal increase occurred (+1.0%).
- ▶ Employment in this category in internationally traded and financial services grew by 324.2% (5,592 jobs) over the period 1993-2002 to 7,317 jobs in 2002.

³ Excludes Shannon Development

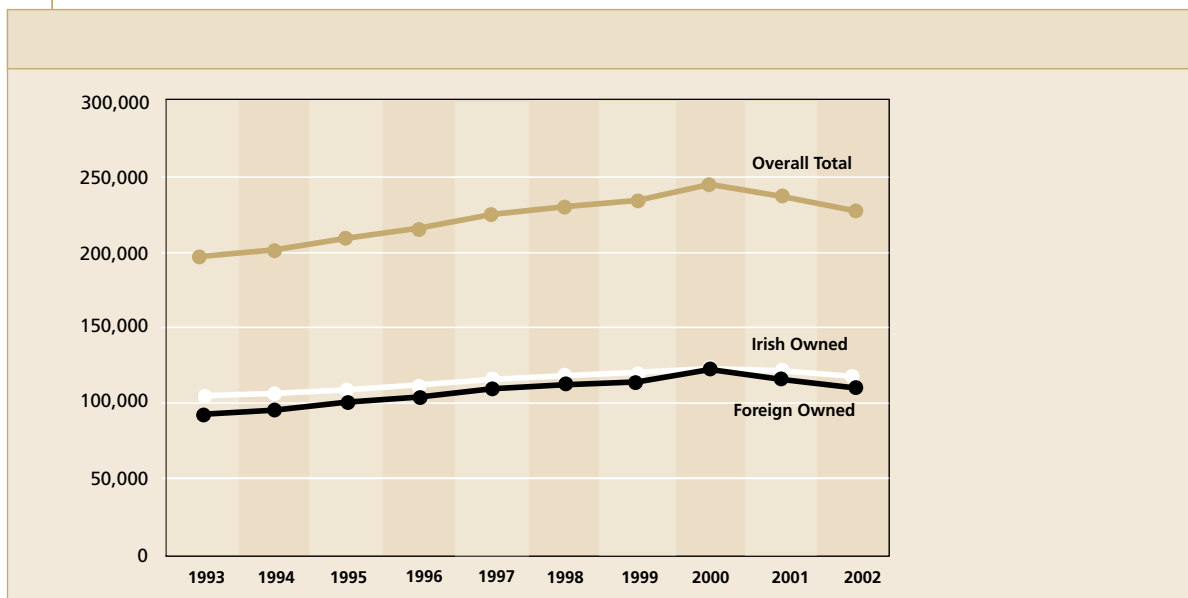
Chart 5 : Trends in Permanent and Part-time, Temporary and Short-term Contract Employment 1993-2002
Manufacturing/Internationally Traded and Financial Services/Other Activities
 IDA Ireland, Enterprise Ireland & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Permanent Jobs	217,402	224,436	235,099	247,679	263,776	278,294	292,844	316,746	313,456	303,707
Other Jobs	18,678	23,911	27,827	26,461	31,274	33,045	34,861	34,941	32,541	33,085
Overall Total	236,080	248,347	262,926	274,140	295,050	311,339	327,705	351,687	345,997	336,792

- ▶ The share of total employment accounted for by part-time temporary and short-term contract employment (excluding Shannon Development who do not currently record this form of employment) has increased over the past ten years (from 7.9% of all jobs in 1993 to 9.8% in 2002).

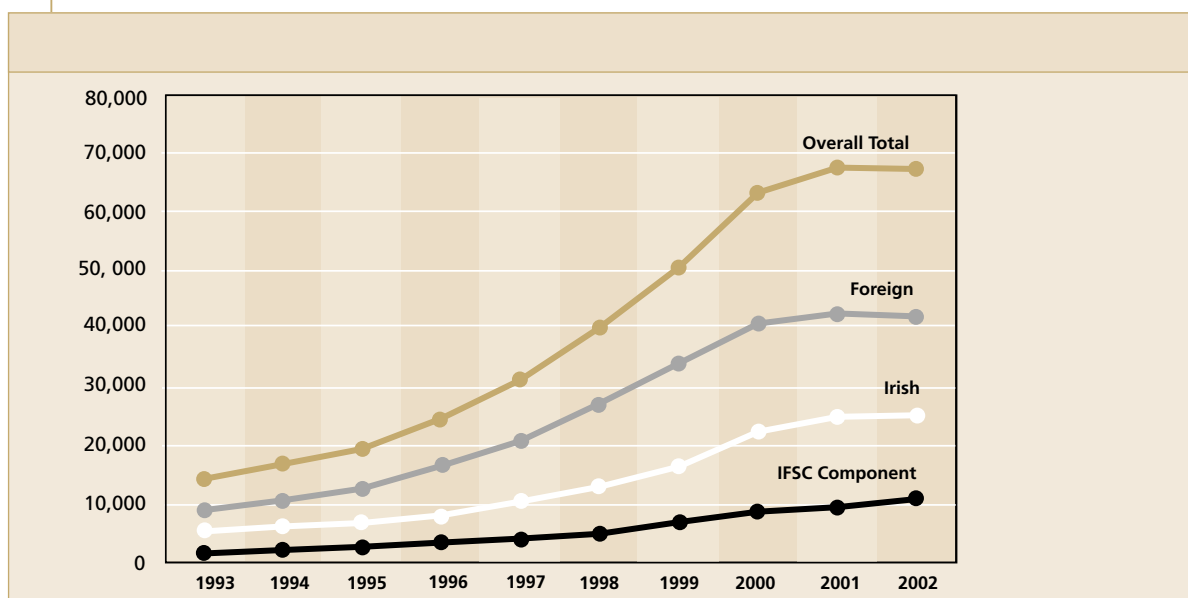
Chart 6 : Trends in Permanent Full-Time Manufacturing Employment 1993-2002
Overall / Irish / Foreign-owned Components
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	197,413	201,759	209,475	216,216	225,287	230,397	234,571	245,208	237,119	227,666
Irish	104,854	106,429	108,820	112,147	115,749	118,204	120,486	122,899	121,480	117,592
Foreign	92,559	95,330	100,655	104,069	109,538	112,193	114,085	122,309	115,639	110,074

- Permanent full-time employment in manufacturing decreased by 9,453 jobs (-4.0%) in 2002. This follows a decline of 8,089 jobs (-3.3%) in 2001, the only two years in which declines occurred over the past 10 years. The highest increase was recorded in 2000 (+4.5%) which represented 1.4 percentage points above the average year on year growth for the period 1993-2000. Over the ten year period as a whole, employment increased by 15.3%, which compares with declines in manufacturing employment recorded by most major economies (Chart 11).
- Permanent full-time employment in Irish-owned manufacturing companies increased by 17.2% over the period 1993-2000, rising in each year to reach a peak of 122,899 jobs in 2000. In the following two years manufacturing employment declined by 1.2% in 2001 and 3.2% in 2002 and now stands at 117,592 jobs. Employment in Irish-owned companies represented 51.7% of total permanent full-time employment in manufacturing in 2002, compared to 51.2% in 2001 and 53.1% in 1993.
- Employment in foreign-owned manufacturing companies declined by 5,565 jobs (-4.8%) in 2002. This follows a decline of 6,670 jobs (-5.5%) in 2001. Employment in foreign-owned manufacturing companies displayed consistent growth from 1993 to reach a peak of 122,309 in 2000. Over the ten year period as a whole, manufacturing employment increased by 17,515 jobs (+18.9%) and in 2002 represented 48.3% of permanent full-time employment in manufacturing compared with 48.8% in 2001 and 46.9% in 1993.

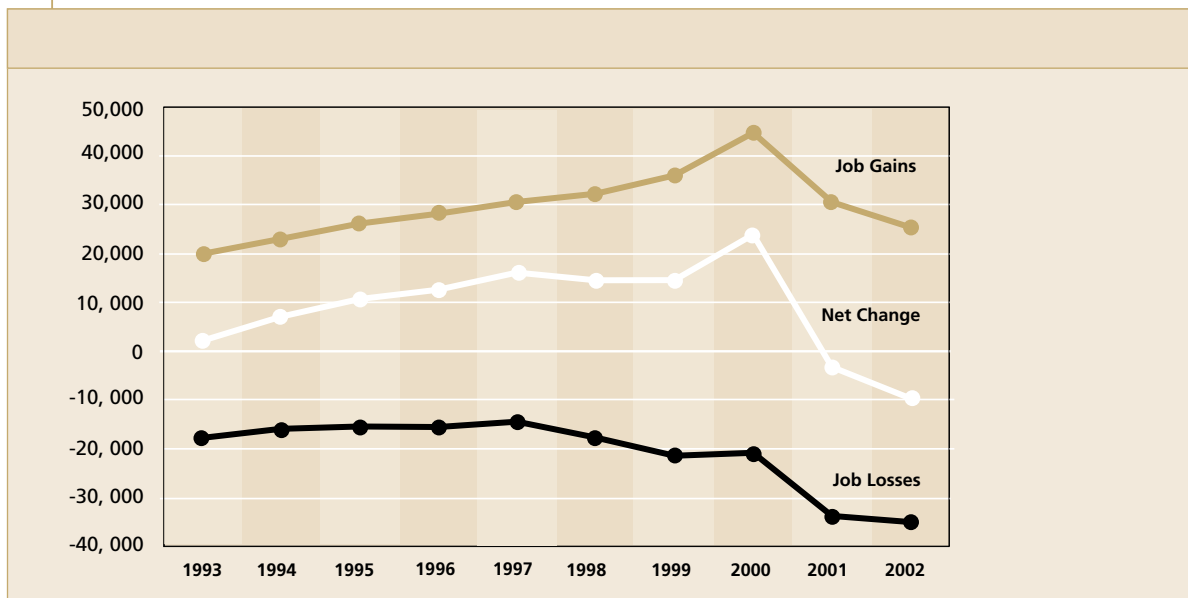
Chart 7 : Trends in Permanent Full-Time Internationally Traded and Financial Services Employment 1993-2002
Overall / Irish / Foreign-owned Components
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Overall Total	14,299	16,851	19,444	24,640	31,261	40,221	50,529	63,316	67,598	67,359
Foreign	8,964	10,657	12,661	16,549	20,813	27,234	34,099	40,912	42,642	42,138
Irish	5,335	6,194	6,783	8,091	10,448	12,987	16,430	22,404	24,956	25,221
IFSC Component	1,567	2,160	2,710	3,437	4,117	4,941	6,933	8,724	9,494	10,892

- ▶ Permanent full-time employment in Irish-owned internationally traded and financial services companies increased by 19,886 (372.7%) from 5,335 in 1993 to 25,221 in 2002. In 2002, the increase was 265, an increase of 1.1% over 2001. The highest increase over the ten year period 1993-2002 was achieved in 2000 (36.4%).
- ▶ Permanent full-time employment in foreign-owned internationally traded and financial services companies increased by 33,174 jobs (370.1%) over the ten year period 1993-2002. In 2002, a small decline occurred (-1.2%). This follows an increase of 1,730 jobs (4.3%) achieved in 2001.
- ▶ Permanent full-time employment in international financial services (IFSC approved companies) increased to 10,892 in 2002 and accounts for 16.2% of the internationally traded/financial services total. The international financial services increase in 2002 was 1,398 (14.7%).

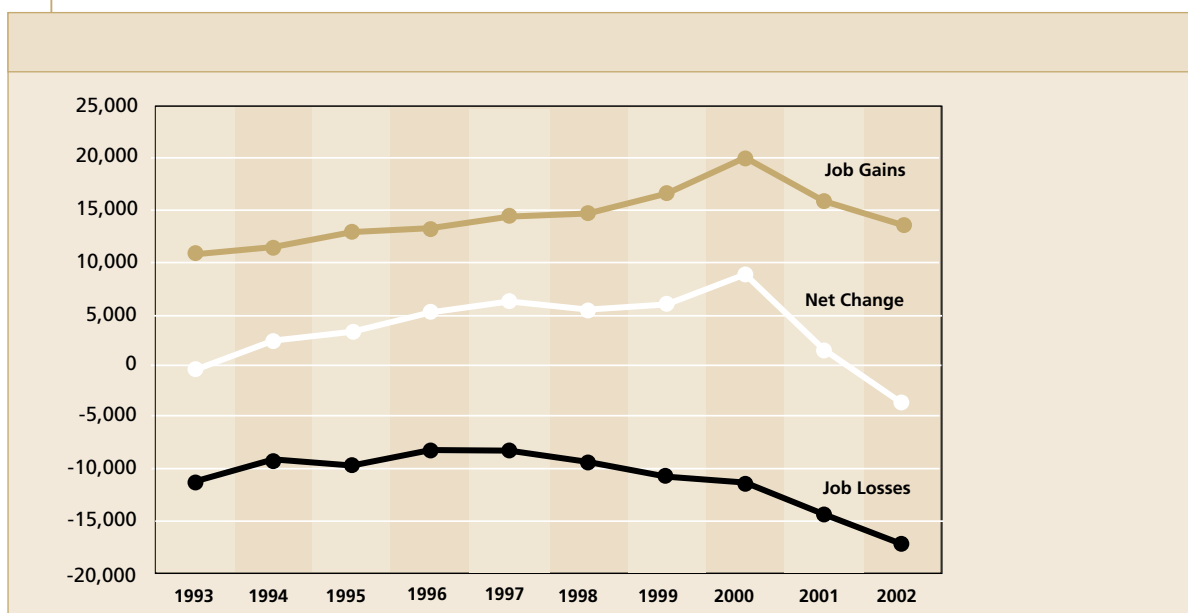
Chart 8 : Trends in Permanent Full-Time Employment 1993-2002
Job Gains/ Job Losses / Net Change
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Job Gains	19,919	23,008	26,151	28,177	30,597	32,282	36,045	44,789	30,553	25,360
Job Losses	-17,838	-15,974	-15,488	-15,597	-14,500	-17,764	-21,495	-20,887	-33,843	-35,109
Net Change	2,081	7,034	10,663	12,580	16,097	14,518	14,550	23,902	-3,290	-9,749

- ▶ In 2002, the level of total gross job gains in manufacturing, internationally traded/financial services and other activities supported by the agencies stood at 25,360 which represents a drop of 17.0% on the level achieved in 2001 and the lowest level of gains recorded since 1995. Over the ten year period 1993-2002 the level of job gains increased by 27.3% (5,441).
- ▶ The level of job losses increased by 96.8% over the ten year period to reach 35,109 in 2002. This represents an increase of 3.7% on the level of job losses recorded in 2001 and the highest level of losses over the past ten years.
- ▶ Overall net change has moved from a positive 2,081 in 1993 to a negative 3,290 in 2001 and a negative 9,749 in 2002. The intervening years 1994-2000 showed a net change position increasing from a positive 7,034 in 1994 to 23,902 in 2000.

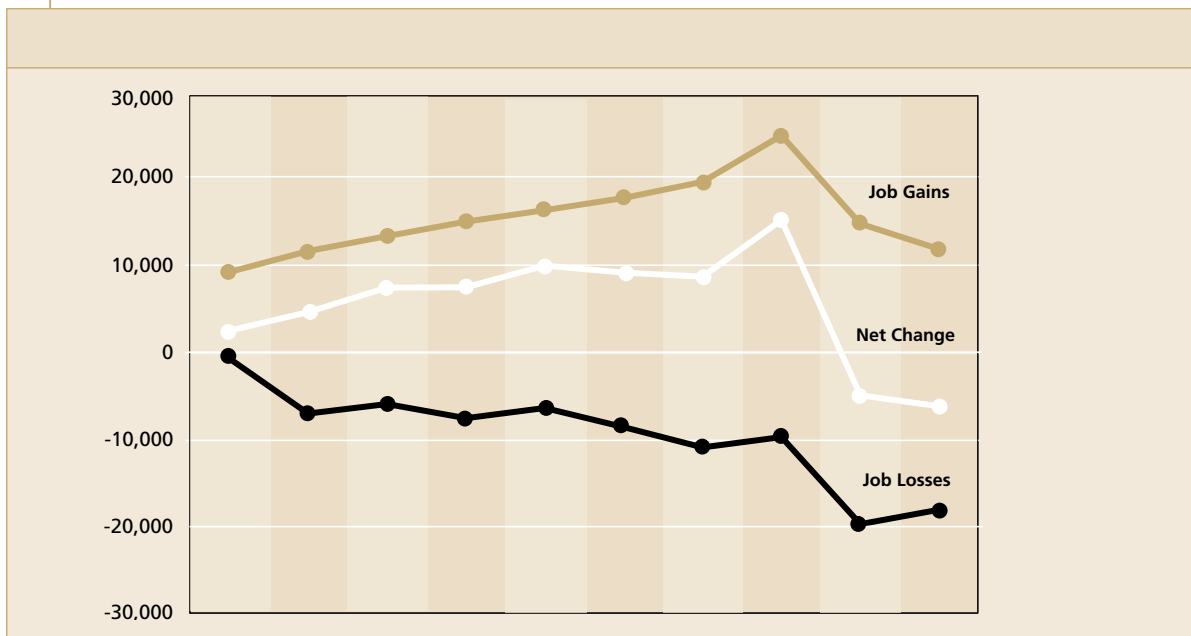
Chart 9 : Trends in Permanent Full-Time Employment in Irish Owned Firms 1993-2002
Manufacturing/Internationally Traded and Financial Services/Other Activities
Job Gains/ Job Losses / Net Change
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Job Gains	10,770	11,474	12,919	13,297	14,412	14,714	16,636	20,111	15,913	13,605
Job Losses	-11,171	-9,037	-9,632	-8,135	-8,193	-9,283	-10,708	-11,277	-14,335	-17,244
Net Change	-401	2,437	3,287	5,162	6,219	5,431	5,928	8,834	1,578	-3,639

- Gross job gains increased by 2,835 (+26.3%) to a level of 13,605 over the period 1993-2002. In 2002, gross gains declined by 2,308 (-14.5%) on the level achieved in 2001 (15,913) which represented a decline in that year of 4,198 (-20.9%) over 2000. The level of gross gains (20,111) in 2000 was the highest achieved over the ten year period.
- In 2002, the level of job losses increased by 20.3% to 17,244, the highest level recorded since 1993 when job losses stood at 11,171. The rate of job losses (-8,135) in 1996 was the lowest level recorded to date. In 1997, job losses rose to 8,193 and increased further in the following 5 years (by 110.5%) to 17,244 in 2002. Over the ten year period 1993-2002 as a whole, the level of job losses increased by 54.4%.
- Over the ten year period 1993-2002, net change in Irish-owned industry improved from a net loss of -401 in 1993 to a positive 2,437 in 1994. Net change then increased each year (with a small decline occurring in 1998) to reach a level of 8,834 in 2000, the highest level recorded over the ten year period. However, net change declined dramatically to 1,578 in 2001 and then moved to a negative 3,639 in 2002.

Chart 10: Trends in Permanent Full-Time Employment in Foreign Owned Firms 1992-2002
Manufacturing/Internationally Traded and Financial Services/Other Activities
Overall / Job Gains/ Job Losses / Net Change
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta

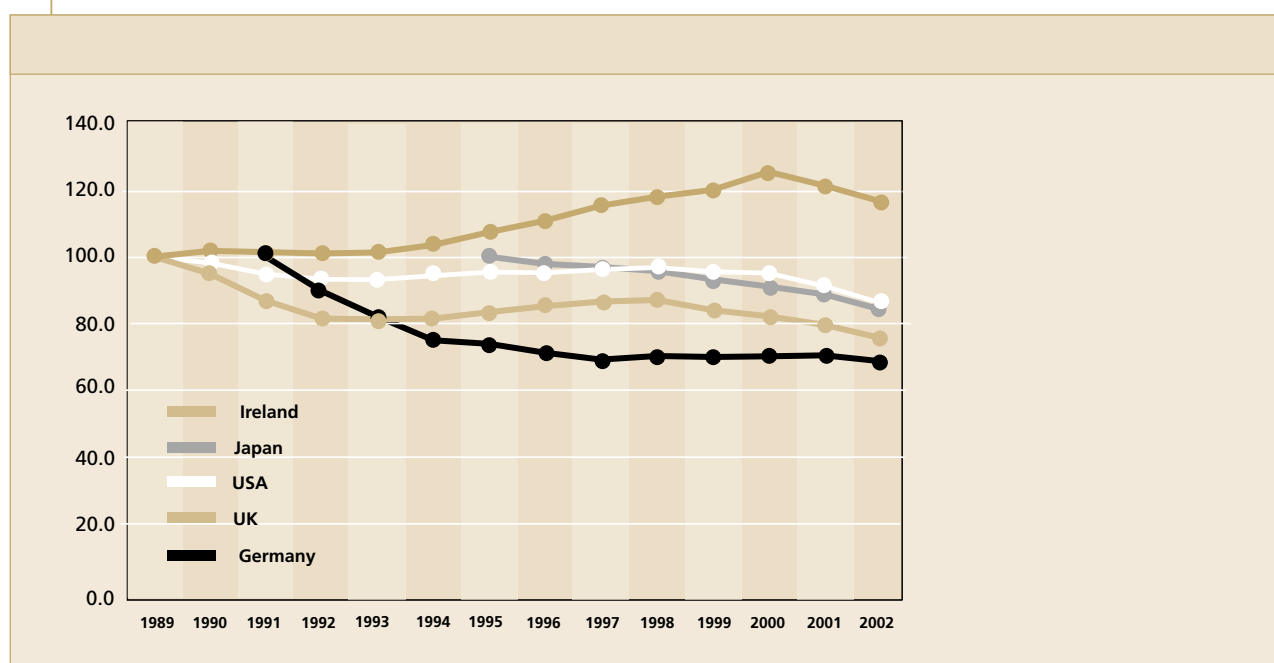


	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Job Gains	9,149	11,534	13,232	14,880	16,185	17,568	19,409	24,678	14,640	11,755
Job Losses	-6,667	-6,937	-5,856	-7,462	-6,307	-8,481	-10,787	-9,610	-19,508	-17,865
Net Change	2,482	4,597	7,376	7,418	9,878	9,087	8,622	15,068	-4,868	-6,110

- Gross job gains increased by 2,606 (28.5%) to a level of 11,755 over the period 1993-2002. A decline was recorded in 2002 (-19.7%) from 14,640 in 2001. This followed a decline of 40.7% in 2001, the first year a decrease was recorded over the 10 years.
- Job losses rose from 6,667 in 1993 to 17,865 in 2002 (+168.0%). The level of job losses in 2002 is a decline of 8.4% on the level sustained in 2001 (19,508), the highest number of losses over the 10 year period.
- Net change in foreign-owned companies stood at a positive 2,482 in 1993 and increased to a level of 15,068 in 2000. A significant decline occurred in 2001 when the net change position reduced to -4,868 and declined further in 2002 to -6,110, the lowest recorded over the 10 year period. The decline in 2002 is due to a deterioration in the number of gross job gains achieved coupled with a high level (2nd highest over the 10 years) of job losses in that year.

2. International Trends In Manufacturing Employment

Chart 11: International Trends in Manufacturing Employment
(Employment Expressed as a percentage of 1989 level)⁴



	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002*
Ireland **	100.0	101.8	101.4	101.0	101.3	103.6	107.5	111.0	115.6	118.3	120.4	125.9	121.7	116.9
UK	100.0	94.8	86.6	81.1	80.9	81.1	83.1	84.9	86.3	86.8	83.7	81.8	79.2	75.2
Germany			100.0	89.5	81.7	74.5	73.4	70.7	68.6	69.7	69.4	69.6	69.9	68.1
USA	100.0	98.1	94.7	93.1	93.0	94.2	95.3	95.1	96.1	96.7	95.4	95.0	91.0	85.9
Japan							100.0	97.8	96.9	95.6	93.1	90.9	88.5	83.9

Source: OECD Main Economic Indicators January 2003

* Quarter 3

** Forfás Employment Survey

OECD figures show that Ireland is unusual in displaying significantly increased manufacturing employment over the 14 year period 1989-2002. The above chart highlights the growth in manufacturing employment in Ireland over the last 14 years and contrasts with falls in the major economies for which these data are available. However, the data also shows that reductions in manufacturing employment occurred in most of the major economies in 2002 (including Ireland) in response to adverse economic conditions.

⁴ Except Germany and Japan where employment is expressed as a percentage of the 1991 and 1995 levels respectively in the OECD statistics.

USA

The USA suffered a decline in manufacturing employment of 14.1% since 1989. In contrast, Ireland's rate of manufacturing employment growth over the 14 year period was 16.9%. Manufacturing employment in the USA declined by 7.0% between 1989 and 1993. Employment then recovered and increased by 2.2% between 1993 and 2000. However, employment declined by 4.2% in 2001 and this was followed by a further decline of 5.6% in the first 9 months of 2002.

Japan

Manufacturing employment in Japan declined by 16.1% between 1995 (when OECD statistics re-based) and the third quarter of 2002.

Germany

The most substantial change has been evident in Germany. OECD statistics show that manufacturing employment in enterprises with 20 or more employees reduced by 31.9% between 1991 and the third quarter of 2002. The decline over the third quarter of 2002 was 2.6%.

United Kingdom

The decline in the UK continues a trend evident since the early 1980's. Between 1994 and 1998 the trend reversed. However, since 1998 manufacturing employment has continued to decline, falling by 13.4% between 1998 and the third quarter of 2002.

Spain/Portugal

Industrial employment in Spain declined by 16.5% between 1989 and 1994. However, since 1994 employment has increased each year, rising by a very substantial 23.7% between 1994 and the third quarter of 2002. Industrial employment actually increased by 0.7% in the first 9 months of 2002.

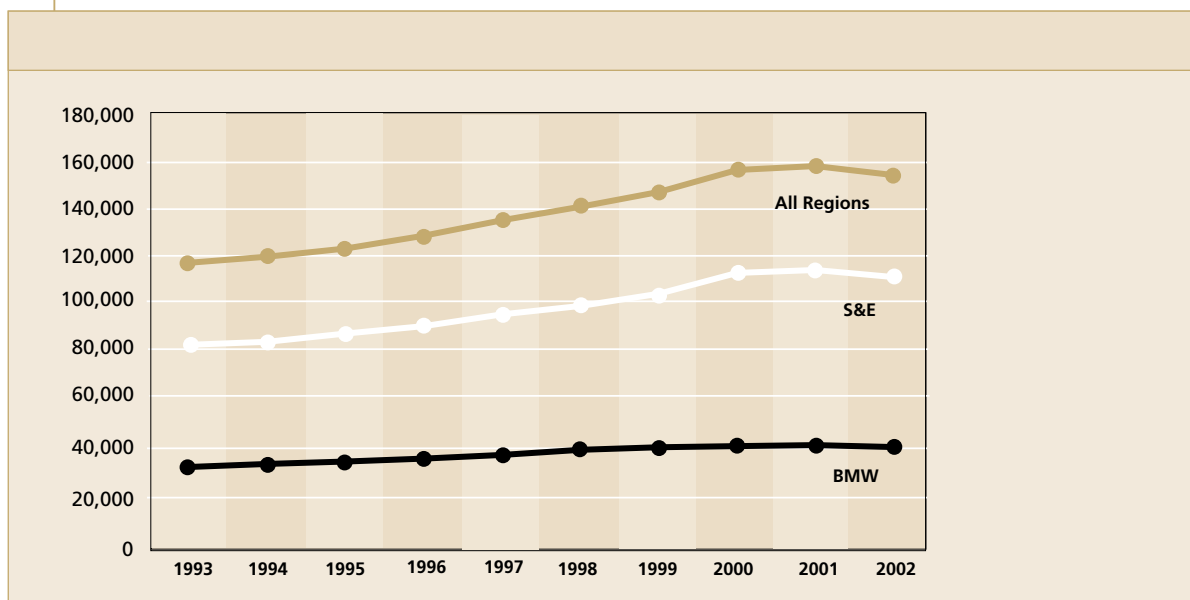
Industrial employment in Portugal declined by 17.8% between 1995 (when the OECD statistics were re-based) and the third quarter of 2002.

Other

Manufacturing employment in Norway declined by 6.3% between 1989 and the third quarter of 2002, while industrial employment in Sweden fell by 26.1% over this period.

3. Regional Trends

Chart 12: *Regional Trends in Irish Owned Permanent Full Time Employment Manufacturing/Internationally Traded and Financial Services/Other Activities IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta*



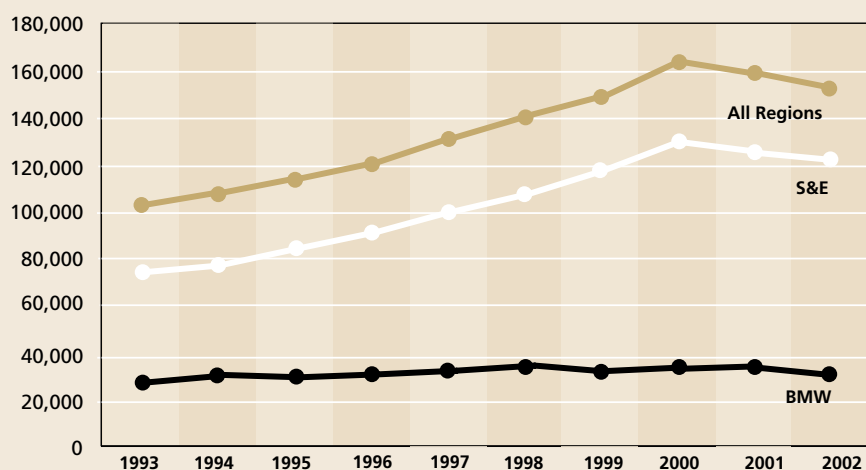
	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	30,098	30,547	31,724	33,591	36,701	38,576	41,073	46,390	47,580	44,998
Mid East	9,701	10,029	10,440	11,100	11,702	11,830	12,657	13,430	14,340	14,235
Mid West	9,501	9,847	10,199	10,624	10,736	11,338	11,868	11,933	11,350	11,152
South West	17,900	17,952	18,466	18,920	19,518	20,083	20,538	22,673	22,197	22,377
South East	14,921	14,955	14,821	15,399	15,715	15,921	16,515	16,603	16,730	16,585
Midlands	5,059	5,378	5,715	5,859	6,368	6,785	7,064	7,054	7,272	7,221
Border	18,113	18,497	18,913	19,346	19,642	20,464	20,782	20,512	20,456	19,913
West	9,819	10,344	10,558	11,159	11,835	12,651	13,079	13,815	14,063	13,868
All Regions	115,112	117,549	120,836	125,998	132,217	137,648	143,576	152,410	153,988	150,349

On a Regional basis permanent full-time Employment in Irish-owned companies in the Southern and Eastern Regions reached a peak of 112,197 in 2001 before declining to 109,347 (-2.5%) in 2002. Over the 10 year period 1993-2002, permanent full-time employment in these regions increased by 27,226 (33.2%).

- The **South West** region was the only region to record an increase in 2002 (+0.8%), while employment increased by 25.0% over the ten year period as a whole. This region now accounts for 20.5% of permanent full-time employment in Irish-owned companies in the Southern and Eastern regions as a whole, which is a decrease of 6.0% on its percentage share since 1993.

- The **Mid East** region recorded a small decline in 2002 (-0.7%), while employment increased by 46.7% over the ten year period as a whole. This region now accounts for 13.0% of permanent full-time employment in Irish-owned companies in the Southern and Eastern regions as a whole, which is an increase of 10.2% on its percentage share since 1993.
- The **South East** region recorded a small decline in 2002 (-0.9%) while employment increased by 11.2% over the ten year period as a whole. This region now accounts for 15.2% of permanent full-time employment in Irish-owned companies in the Southern and Eastern regions as a whole compared to 18.2% in 1993, a decline in its percentage share of 16.5%.
- The **Mid West** region recorded a decline (-1.7%) in 2002 and recorded an increase of 17.4% over the ten year period as a whole. This region now accounts for 10.2% of permanent full-time employment in Irish-owned companies in the Southern and Eastern regions which represents a decrease of 12.1% on its percentage share in 1993.
- **Dublin** recorded the largest decline (-5.4%) in 2002, while employment increased by 49.5% over the ten year period as a whole. Dublin now accounts for 41.2% of permanent full-time employment in Irish-owned companies in the Southern and Eastern regions as a whole, which is an increase of 12.3% on its percentage share since 1993.
- ▶ Permanent full-time employment in Irish-owned companies in the **Border, Midlands and West** regions increased each year from 1993-2001, rising by 26.7% before recording a small decline (-1.9%) in 2002.
- Employment in the **Midlands** region decreased by 0.7% in 2002, the lowest decrease in the BMW region in that year. Over the ten year period 1993-2002, this region recorded an increase in employment of 42.7%, the highest in the BMW region.
- The **West** region recorded a decline in employment of 1.4% in 2002 and a growth rate of 41.2% over the 1993-2002 period as a whole.
- The **Border** region recorded a decline of 2.7% in 2002, the highest in the BMW region and an overall growth rate of 9.9% over the 1993-2002 period as a whole.

Chart 13: Regional Trends in Foreign Owned Permanent Full Time Employment Manufacturing/Internationally Traded and Financial Services/Other Activities
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta

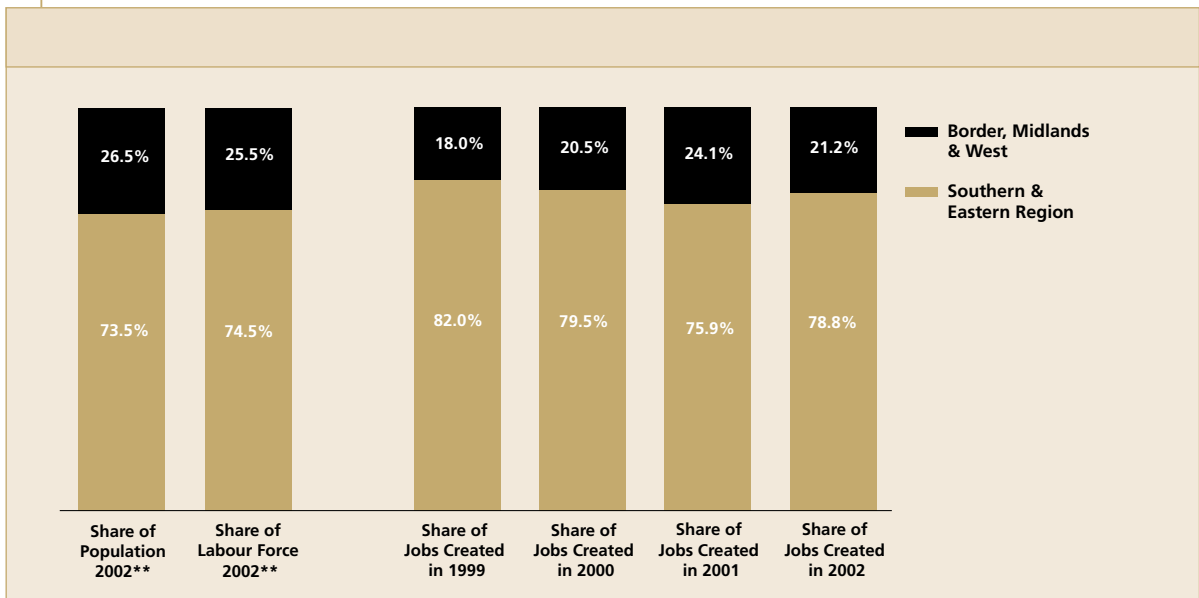


	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	28,386	29,286	32,387	35,704	40,111	45,056	51,402	57,609	55,011	54,003
Mid East	7,255	8,228	9,736	11,239	13,406	13,629	14,101	16,012	15,140	15,408
Mid West	14,014	14,733	15,609	16,435	17,329	18,976	20,492	22,187	21,119	18,730
South West	15,241	15,150	15,581	16,271	16,712	17,967	19,586	22,788	23,614	22,508
South East	9,762	9,923	10,156	11,033	11,436	11,288	11,405	11,363	11,706	12,071
Midlands	5,896	6,099	5,951	6,018	6,120	6,136	5,679	5,758	5,503	5,389
Border	12,762	13,916	14,439	13,718	14,104	14,118	13,162	13,300	12,207	11,523
West	8,974	9,552	10,404	11,263	12,341	13,476	13,441	15,319	15,168	13,726
All Regions	102,290	106,887	114,263	121,681	131,559	140,646	149,268	164,336	159,468	153,358

- On a regional basis, permanent full-time employment in **foreign-owned** companies in the **Southern and Eastern** regions declined by 3.1% in 2002, from 126,590 in 2001. Employment over the 10 year period peaked at 129,959 in 2000 before declining in the following year to 126,590 (-2.6%). Over the ten year period, permanent full-time employment in these regions increased by 48,062 (64.4%).
 - The **South East** was one of two regions to record an increase in 2002 (+3.1%), while employment increased by 23.7% over the ten year period as a whole. The region now accounts for 9.8% of permanent full-time employment in foreign-owned companies, a decrease of 25.2% on its percentage share in 1993.
 - The **Mid East** recorded an increase of 1.8%, the only other regional positive increase in 2002. Permanent full-time employment in the Mid East increased by 112.4% over the ten year period 1993-2002 as a whole. The region now accounts for 12.6% of permanent full-time employment in foreign-owned companies, an increase of 29.9% on its percentage share in 1993.

- The **Mid West** region recorded a decline of 11.3% (the highest regional decrease) in 2002. However, employment in the Mid West increased by 33.6% over the ten year period 1993-2002 as a whole.
- The **South West** region recorded a decline in employment of 4.7% in 2002, while employment increased by 47.7% over the ten year period as a whole.
- **Dublin** recorded a decline of 1.8% in permanent full-time employment in 2002, the lowest decline in the Southern and Eastern regions in that year, while employment increased by 90.2% over the ten year period 1993-2002 as a whole.
- ▶ Permanent full-time employment in **foreign-owned** companies in the **Border, Midlands and West** regions declined by 6.8% in 2002. Overall, these regions recorded an increase of 10.9% over the period 1993-2002. The increase recorded for all regions of Ireland over the same period was 49.9%.
- Employment in the **West** region declined by 9.5% in 2002, the highest decline in that year in the BMW region. Over the ten year period 1993-2002, this region recorded an increase in employment of 53.0%.
- The **Border** region recorded a decline of 5.6% in 2002 and an overall decline of 9.7% over the 1993-2002 period as a whole.
- The **Midlands** region recorded a decline of 2.1% in 2002 and an overall decline of 8.6% over the 1993-2002 period as a whole.

Chart 14: *Regional Distribution of Employment Creation*
Share of Jobs Created in Agency Supported Companies by Region
1999-2002 Relative to Share of Population and Labour Force



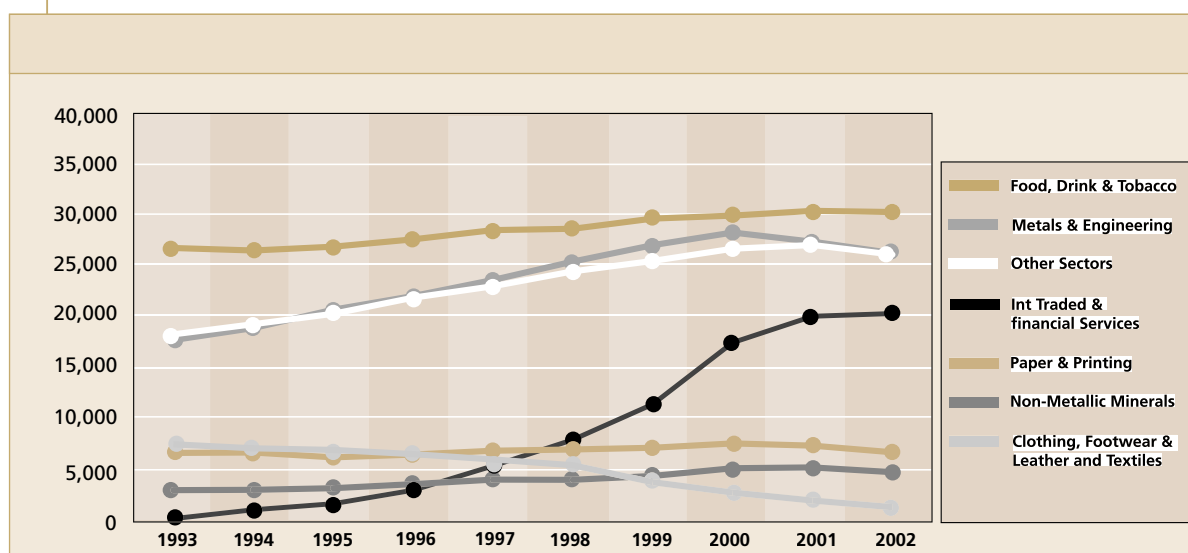
** CSO Statistics

Chart 14 shows the distribution of jobs created in agency-supported companies between the **Southern and Eastern Region** (Objective 1 in Transition) and the **Border, Midland and West region**. The **Border, Midlands and West (BMW)** region has tended in the past to perform less satisfactorily than the rest of the country in terms of increasing and sustaining its employment in manufacturing and internationally-traded services.

The chart shows that the BMW region accounts for 26.5 per cent of the population and 25.5 per cent of the labour force. In 1999, the region accounted for 18.0 per cent of gross job gains in agency-assisted companies. This share has increased to more than 21 per cent in 2002, a figure that is lower than that recorded in the previous year. Forfás will continue to monitor the regional share of employment gains in agency-assisted companies into the future.

4. Sectoral Trends (1993-2002)

Chart 15: Sectoral Trends in Permanent Full-time Irish-Owned Employment Manufacturing and Internationally Traded and Financial Services Employment (1993-2002)
IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

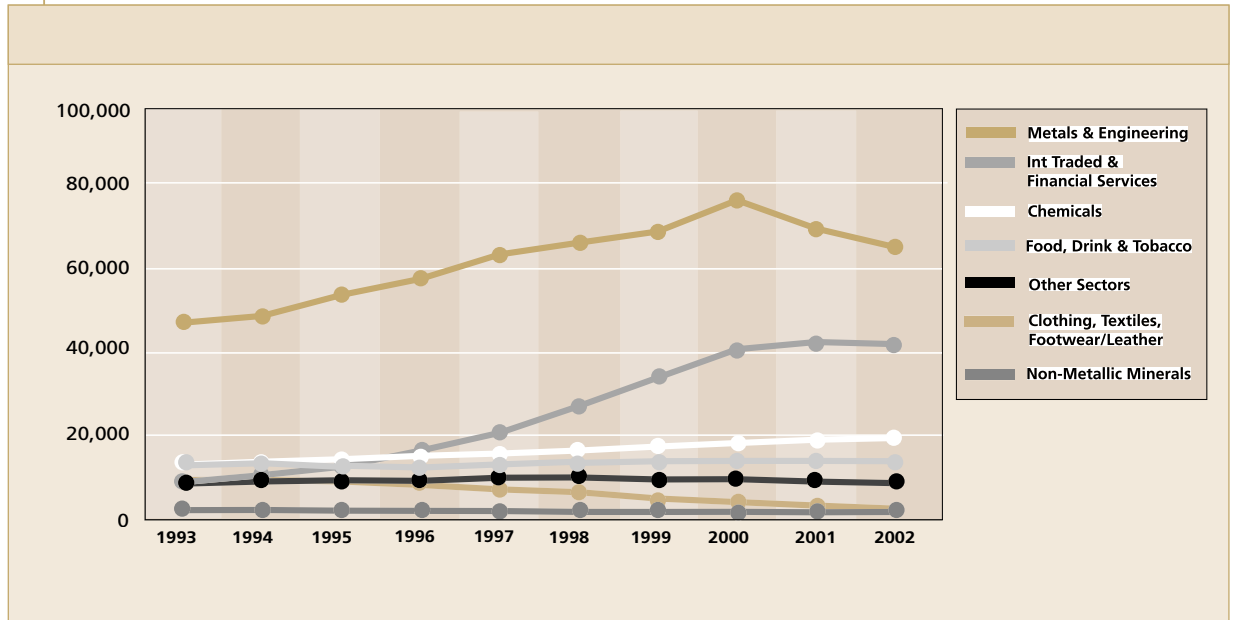


Sectors	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Food, Drink & Tobacco	31,575	31,332	31,702	32,414	33,310	33,438	34,425	34,715	35,178	35,062
Clothing, Footwear & Leather and Textiles	12,545	12,152	11,998	11,589	11,076	10,512	8,868	7,862	7,089	6,446
Paper & Printing	11,706	11,741	11,276	11,548	11,921	12,040	12,207	12,627	12,412	11,768
Non-Metallic Minerals	8,097	8,129	8,285	8,680	9,118	9,099	9,473	10,223	10,301	9,840
Metals & Engineering	22,650	23,814	25,595	26,918	28,476	30,261	31,852	33,074	32,185	31,078
Int Traded & Financial Services	5,335	6,194	6,783	8,091	10,448	12,987	16,430	22,404	24,956	25,221
Other Sectors	23,204	24,187	25,197	26,758	27,868	29,311	30,321	31,505	31,867	30,934
Overall Total:	115,112	117,549	120,836	125,998	132,217	137,648	143,576	152,410	153,988	150,349

- Total permanent full-time employment in Irish-owned companies stood at 150,349 in 2002, a decline of 2.4% on 2001. Employment in 2002 was 30.6% higher than in 1993.
- Internationally Traded and Financial Services has been the fastest growing sector over the 10 year period (an increase of 372.7% or 19,886 jobs). This is the only sector to record an increase in 2002 with permanent full-time employment rising by 1.1% or 265 jobs. This sector employed 16.8% of the permanent full-time workforce in Irish-owned industry in 2002, compared with 4.6% in 1993.

- ▶ The Food Drink & Tobacco sector now accounts for 23.3% of total permanent employment in Irish-owned companies, down from 27.4% in 1993. This is still the highest employing sector where employment fell by a marginal 0.3% in 2002.
- ▶ Metals & Engineering now accounts for 20.7% of total Irish-owned permanent employment but recorded a decline in 2002 (-3.4% or 1,107 jobs). This sector's employment grew by 37.2% (8,428 jobs) since 1993.
- ▶ Permanent full-time employment in the Paper & Printing sector grew by only 0.5% over the ten year period 1993-2002 and recorded a decline of 5.2% in 2002.
- ▶ Permanent full-time employment in Non-Metallic Minerals grew by 21.5% over the ten year period 1993-2002. The decline in 2002 was 4.5% (461 jobs).
- ▶ The Clothing, Textiles, Footwear/Leather sectors suffered a major decline in permanent full-time employment over the ten year period, decreasing by 48.6% (6,099 jobs). In 2002, this sector's employment declined by 9.1% (643 jobs). This sector's share of employment has declined from 10.9% in 1993 to 4.3% in 2002.

Chart 16: Sectoral Trends in Permanent Full-time Foreign-Owned Employment Manufacturing and Internationally Traded and Financial Services Employment (1993-2002)
 IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta



Sectors	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Metals & Engineering	47,285	48,922	53,957	57,821	63,692	66,509	69,210	76,725	69,911	65,444
Int Traded & Fin Services	89,64	10,657	12,661	16,549	20,813	27,234	34,099	40,912	42,642	42,138
Chemicals	13,181	13,881	14,472	15,292	15,844	16,563	17,525	18,366	19,158	19,568
Food, Drink & Tobacco	12,525	12,543	12,504	12,382	11,932	11,877	11,988	12,646	13,599	13,096
Non-Metallic Minerals	2,237	2,277	2,111	2,064	2,021	1,812	1,801	1,833	1,722	1,798
Clothing, Textiles, Footwear/Leather	9,487	9,482	9,135	8,296	7,225	6,556	5,033	4,177	3,341	2,586
Other Sectors	8,611	9,125	9,423	9,277	10,032	10,095	9,612	9,677	9,095	8,728
Overall Total	102,290	106,887	114,263	121,681	131,559	140,646	149,268	164,336	159,468	153,358

- ▶ Total permanent full-time employment in foreign-owned companies stood at 153,358 in 2002, a decline of 3.8% on 2001, but 49.9% higher than in 1993.
- ▶ Employment in the Metals & Engineering sector (which includes electronics), the highest employment sector, accounts for 42.7% of total employment in foreign-owned companies (65,444). This represents a decline of 6.4% on 2001, but a growth of 38.4% (18,159 jobs) over the ten year period as a whole. This sector accounted for 73.1% of the decline in permanent full-time employment in foreign-owned firms in 2002.

- ▶ The Internationally Traded and Financial Services sector has been the fastest growing sector over the ten year period (370.1% or 33,174 jobs). Permanent full-time employment in this sector declined by 1.2% or 504 jobs in 2002. This sector accounted for 27.5% of total employment in foreign companies (42,138 jobs) in 2002, up from 8.8% in 1993.
- ▶ The Pharmaceuticals/Chemicals sector now accounts for 12.8% of total foreign-owned permanent full-time employment. This represents an increase of 2.1% on 2001, and a rise of 48.5% or 6,387 jobs over the ten year period as a whole.
- ▶ Employment in the Food, Drink & Tobacco sector decreased by 3.7% (503 jobs) in 2002. Over the ten year period 1993-2002, as a whole, employment grew by 4.6% (571 jobs).
- ▶ Permanent full-time employment in the Clothing, Textiles, Footwear/Leather sector declined by 72.7% over the ten year period 1993-2002. A decline occurred in each year over the period with a year on year decrease occurring in 2002 of 22.6%. This process of decline has been accelerating in recent years with employment decreasing by 68.8% since 1996.

Appendix 1

Regional trends in Permanent Full-Time Employment and Part-Time, Temporary/short-term Contract Employment (1993-2002)

All Ownership

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 3: Trends in Permanent Full-Time Employment

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Dublin	58,484	64,111	76,812	92,475	102,591	99,001	-3,590	-3.5	69.2
Mid East	16,956	20,176	25,108	26,758	29,480	29,643	163	0.6	74.8
Mid West	23,515	25,808	28,065	32,360	32,469	29,882	-2,587	-8.0	27.0
South West	33,141	34,047	36,230	40,124	45,811	44,885	-926	-2.0	35.4
South East	24,683	24,977	27,151	27,920	28,436	28,656	220	0.8	16.0
West	18,793	20,962	24,176	26,520	29,231	27,594	-1,637	-5.6	46.8
Midlands	10,955	11,666	12,488	1,743	12,775	12,610	-165	-1.3	15.1
Border	30,875	33,352	33,746	33,944	32,663	31,436	-1,227	-3.8	1.8
All Regions	217,402	235,099	263,776	292,844	313,456	303,707	-9,749	-3.1	39.7

Table 4 Trends in Part-time, Temporary and Short-term Contract Employment*

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Dublin	4,004	5,916	7,894	11,134	9,477	9,978	501	5.3	149.2
Mid East	1,547	3,171	2,313	2,652	2,363	2,056	-307	-12.9	32.9
Mid West	669	1,746	1,483	940	848	763	-85	-10.0	14.5
South West	4,248	5,895	5,647	5,689	5,486	6,328	842	15.3	48.9
South East	2,124	2,906	3,859	3,606	3,677	3,895	218	5.9	83.3
West	1,916	3,429	4,689	5,366	4,876	4,904	28	0.6	155.9
Midlands	863	1,050	961	1,235	1,313	1,075	-238	-18.1	24.6
Border	3,307	3,714	4,428	4,239	4,501	4,086	-415	-9.2	23.6
All Regions	18,678	27,827	31,274	34,861	32,541	33,085	544	1.7	77.1

* excludes Shannon Development

Appendix 2

*Regional trends in Permanent Full-Time Employment and Part-Time, Temporary/short-term Contract Employment (1993-2002)
Irish/Foreign Component
IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta*

Table 5: *Trends in Irish-Owned Permanent Full-Time Employment*

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	30,098	30,547	31,724	33,591	36,701	38,576	41,073	46,390	47,580	44,998
Mid East	9,701	10,029	10,440	11,100	11,702	11,830	12,657	13,430	14,340	14,235
Mid West	9,501	9,847	10,199	10,624	10,736	11,338	11,868	11,933	11,350	11,152
South West	17,900	17,952	18,466	18,920	19,518	20,083	20,538	22,673	22,197	22,377
South East	14,921	14,955	14,821	15,399	15,715	15,921	16,515	16,603	16,730	16,585
West	9,819	10,344	10,558	11,159	11,835	12,651	13,079	13,815	14,063	13,868
Midlands	5,059	5,378	5,715	5,859	6,368	6,785	7,064	7,054	7,272	7,221
Border	18,113	18,497	18,913	19,346	19,642	20,464	20,782	20,512	20,456	19,913
Overall Total	115,112	117,549	120,836	125,998	132,217	137,648	143,576	152,410	153,988	150,349

Table 6: *Trends in Irish-Owned Part-Time, Temporary and Short-term Contract Employment**

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	1,991	2,361	2,789	2,895	3,491	4,090	4,846	4,689	5,074	5,630
Mid East	968	1,057	1,265	1,265	1,480	1,730	1,691	1,654	1,466	1,319
Mid West	63	120	130	140	102	46	41	78	64	39
South West	2,186	2,377	2,602	2,781	2,556	2,590	2,429	2,950	3,078	3,025
South East	1,503	1,934	1,836	1,706	1,628	1,528	1,983	1,811	1,605	2,207
West	1,655	1,853	2,474	2,652	3,090	2,702	2,836	3,110	3,149	3,168
Midlands	474	617	534	435	387	509	632	598	458	602
Border	2,588	2,741	2,896	3,018	2,886	2,824	3,114	3,353	3,531	3,270
Overall Total	11,428	13,060	14,526	14,892	15,620	16,019	17,572	18,243	18,425	19,260

* excludes Shannon Development

Table 7: Trends in Foreign-Owned Permanent Full Time Employment

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	28,386	29,286	32,387	35,704	40,111	45,056	51,402	57,609	55,011	54,003
Mid East	7,255	8,228	9,736	11,239	13,406	13,629	14,101	16,012	15,140	15,408
Mid West	14,014	14,733	15,609	16,435	17,329	18,976	20,492	22,187	21,119	18,730
South West	15,241	15,150	15,581	16,271	16,712	17,967	19,586	22,788	23,614	22,508
South East	9,762	9,923	10,156	11,033	11,436	11,288	11,405	11,363	11,706	12,071
West	8,974	9,552	10,404	11,263	12,341	13,476	13,441	15,319	15,168	13,726
Midlands	5,896	6,099	5,951	6,018	6,120	6,136	5,679	5,758	5,503	5,389
Border	12,762	13,916	14,439	13,718	14,104	14,118	13,162	13,300	12,207	11,523
Overall Total	102,290	106,887	114,263	121,681	131,559	140,646	149,268	164,336	159,468	153,358

Table 8: Trends in Foreign-Owned Part-Time, Temporary and Short-term Contract Employment*

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
Dublin	2,013	2,570	3,127	3,615	4,403	5,471	6,288	5,510	4,403	4,348
Mid East	579	1,898	1,906	1,116	833	1,259	961	1,030	897	737
Mid West	606	891	1,616	663	1,381	1,096	899	431	784	724
South West	2,062	2,829	3,293	2,415	3,091	3,715	3,260	3,313	2,408	3,303
South East	621	756	1,070	1,231	2,231	1,584	1,623	1,,980	2,072	1,688
West	261	364	955	1,147	1,599	2,151	2,530	2,394	1,727	1,736
Midlands	389	602	516	326	574	634	603	1,019	855	473
Border	719	941	818	1,056	1,542	1,116	1,125	1,021	970	816
All Regions	7,250	10,851	13,301	11,569	15,654	17,026	17,289	16,698	14,116	13,825

* excludes Shannon Development

Appendix 3

Sectoral Trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1993-2002)

All Ownership

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 9: *Sectoral Trends in Full-Time Permanent Employment*

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Chemicals	16,198	17,666	19,329	21,273	23,356	23,550	194	0.8	45.4
Clothing, Footwear & Leather	11,275	10,919	9,192	6,899	4,574	4,025	-549	12.0	64.3
Textiles	10,757	10,214	9,109	7,002	5,856	5,007	-849	14.5	54.5
Food	37,501	37,713	39,286	40,209	41,641	41,447	-194	0.5	10.5
Drink & Tobacco	6,599	6,493	5,956	6,204	7,136	6,711	-425	6.0	1.7
Internationally Traded Services	12,732	16,734	27,144	43,596	58,104	56,467	-1,637	2.8	343.5
Financial Services	1,567	2,710	4,117	6,933	9,494	10,892	1,398	14.7	595.0
Metals & Engineering	69,935	79,552	92,168	101,062	102,096	96,522	-5,574	5.5	38.1
Mining, Quarrying & Indigenous Services	5,690	6,180	7,228	7,744	8,739	8,682	-57	0.7	52.6
Miscellaneous Manufacturing	8,417	9,113	9,882	10,158	9,794	9,487	-307	3.1	12.7
Non-Metallic Minerals	10,334	10,396	11,139	11,274	12,023	11,638	-385	3.2	12.6
Paper & Printing	13,798	13,442	13,818	14,009	13,945	13,298	-647	4.6	3.6
Plastics & Rubber	8,274	9,135	9,865	10,148	10,216	9,746	-470	4.6	17.8
Wood & Wood Products	4,325	4,832	5,543	6,333	6,482	6,235	-247	3.8	44.2
Overall	217,402	235,099	263,776	292,844	313,456	303,707	-9,749	-3.1	39.7

Table 10: Sectoral Trends in Part-Time, Temporary and Short-Term Contract Employment*

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Chemicals	1,036	1,564	1,909	2,203	2,240	1,823	-417	18.6	76.0
Clothing, Footwear & Leather	380	581	494	565	381	381	0	0	0.3
Drink & Tobacco	643	543	739	840	816	863	47	5.8	34.2
Financial Services	82	205	266	309	390	474	84	21.5	478.0
Food	5,437	5,817	5,705	5,122	5,823	5,973	150	2.6	9.9
Internationally Traded Services	1,643	3,224	4,014	5,803	6,651	6,843	192	2.9	316.5
Metals & Engineering	4,006	8,994	10,182	10,538	7,398	7,578	180	2.4	89.2
Mining, Quarrying & Indigenous Services	2,293	3,162	3,314	3,480	3,816	3,861	45	1.2	183.5
Miscellaneous Manufacturing	469	750	1,389	1,693	1,349	1,633	284	21.0	248.2
Non-Metallic Minerals	608	778	702	1,199	700	849	149	21.3	39.6
Paper & Printing	736	820	861	1,194	1,121	1,109	-12	1.1	50.7
Plastics & Rubber	404	462	662	871	676	597	-79	11.7	47.8
Textiles	745	734	696	718	854	757	-97	11.4	1.6
Wood & Wood Products	196	193	341	326	326	344	18	5.5	75.5
Overall	18,678	27,827	31,274	34,861	32,541	33,085	544	1.7	77.1

* excludes Shannon Development

Appendix 4

Sectoral Trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1993-2002)

Irish-Owned / Foreign Owned Components

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 11: *Irish-Owned Sectoral Trends in Full-Time Permanent Employment*

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Chemicals	3,017	3,194	3,485	3,748	4,198	3,982	-216	5.1	32.0
Clothing, Footwear & Leather	8,214	7,848	6,952	5,178	3,817	3,462	-355	9.3	57.9
Drink & Tobacco	1,685	1,628	1,671	1,689	1,812	1,665	-147	8.1	1.2
Financial Services	508	714	949	1,705	2,775	3,314	539	19.4	552.3
Food	29,890	30,074	31,639	327,36	33,366	33,397	31	0.1	11.7
Internationally Traded Services	4,827	6,069	9,499	14,725	22,181	21,907	-274	99.0	354.2
Metals & Engineering	22,650	25,595	28,476	31,852	32,185	31,078	-1107	3.4	37.2
Mining, Quarrying & Indigenous Services	4,923	5,233	6,020	6,660	7,552	7,536	-16	0.2	53.1
Miscellaneous Manufacturing	6,595	7,027	7,908	8,503	8,591	8,389	-202	2.6	27.2
Non-Metallic Minerals	8,097	8,285	9,118	9,473	10,301	9,840	-461	4.5	21.5
Paper & Printing	11,706	11,276	11,921	12,207	12,412	11,768	-644	5.2	0.5
Plastics & Rubber	4,549	5,143	5,511	5,761	5,759	5,424	-335	5.8	19.2
Textiles	4,331	4,150	4,124	3,690	3,272	2,984	-288	8.8	31.1
Wood & Wood Products	4,120	4,600	4,944	5,649	5,767	5,603	-164	2.8	36.0
	115,112	120,836	132,217	143,576	153,988	150,349	-3639	-2.4	30.6

Table 12: Foreign-Owned Sectoral Trends in Full-Time Permanent Employment

	1993	1995	1997	1999	2001	2002	Change 01-02	% Change 01-02	% Change 93-02
Chemicals	13,181	14,472	15,844	17,525	19,158	19,568	410	2.1	48.8
Clothing, Footwear & Leather	3,061	3,071	2,240	1,721	757	563	-194	25.6	81.6
Drink & Tobacco	4,914	4,865	4,285	4,515	5,324	5,046	-278	90.5	2.7
Financial Services	1,059	1,996	3,168	5,228	6,719	7,578	859	12.8	615.6
Food	7,611	7,639	7,647	7,473	8,275	8,050	-225	2.7	5.8
Internationally Traded Services	7,905	10,665	17,645	28,871	35,923	34,560	-1363	3.8	337.2
Metals & Engineering	47,285	53,957	63,692	69,210	69,911	65,444	-4467	99.9	38.4
Mining, Quarrying & Indigenous Services	767	947	1,208	1,084	1,187	1,146	-41	3.5	49.4
Miscellaneous Manufacturing	1,822	2,086	1,974	1,655	1,203	1,098	-105	8.7	39.7
Non-Metallic Minerals	2,237	2,111	2,021	1,801	1,722	1,798	76	4.4	19.6
Paper & Printing	2,092	2,166	1,897	1,802	1,533	1,530	-3	0.2	26.9
Plastics & Rubber	3,725	3,992	4,354	4,387	4,457	4,322	-135	3.0	16.0
Textiles	6,426	6,064	4,985	3,312	2,584	2,023	-561	21.7	68.5
Wood & Wood Products	205	232	599	684	715	632	-83	11.6	208.3
	102,290	114,263	131,559	149,268	159,468	153,358	-6110	-3.8	49.9

Appendix 5

Overview of Methodology and Definitions

The Annual Employment Survey is carried out by postal card and extensive follow-up.

In line with previous years, census returns as at the last Friday in October for permanent and part-time, temporary and short-term contract employment were sought.

In the presentation of the results, we have reflected the nationality of any companies at the time of reporting. In the light of changes of ownership, the inclusion of new companies and the correction of identified errors, historic employment figures have been restated where appropriate. Therefore, the figures will differ slightly from those previously reported.

Definitions

Permanent Full-Time	Employees who will have been employed full-time for nine months or longer or who will be on contracts of nine months or longer on 31st October.
Temporary, Short-term Contract	Employees who will have been employed for less than 9 months to 31st October or who are employed on a casual basis or on employment contracts of less than 9 months
Part-Time	Employees who work on a continuous basis on agreed shorter working hours (less than twenty-five hours a week) but who are employed on 31st October. For example, job sharing or short extra shift staff.
Job Gains	Increase in employment (calculated on a company by company basis) arising in the survey year over and above the employment level in the previous year. Job gains include both grant-aided and non-grant aided companies.
Job Losses	Decrease in employment (calculated on a company by company basis) arising in the survey.
Net Change	Difference between the total job gains and the total job losses.

Reports Published by Forfás 2002 / 2003

The Labour Market Participation of Over 55s in Ireland <i>Expert Group on Future Skills Needs</i>	January 2002
International Trade and Investment Report	February 2002
Biotechnology <i>Irish Council for Science, Technology & Innovation (ICSTI)</i>	February 2002
Enlargement of the European Union <i>Forfás Submission to the National Forum on Europe</i>	February 2002
Broadband Investment in Ireland	March 2002
Research & Development in the Business Sector 1999	May 2002
Comparative Consumer Prices in the Eurozone	June 2002
Forfás Annual Report 2001	July 2002
e-Business: Where we are and where do we go from here	August 2002
Measuring and Evaluating Research <i>Irish Council for Science, Technology & Innovation (ICSTI)</i>	August 2002
Legislating for Competitive Advantage in e-Business and Information & Communications Technologies	October 2002
A Strategy for the Digital Content Industry in Ireland	November 2002
Annual Competitiveness Report 2002 & The Competitiveness Challenge Report <i>National Competitiveness Council (NCC)</i>	November 2002
World Trade Organisation Negotiating Objectives for Irish Enterprise Policy	February 2003
National Survey of Vacancies in the Private Non-Agricultural Sector National Survey of Vacancies in the Public Sector <i>Expert Group on Future Skills Needs</i>	March 2003
Utilising Intellectual Property for Competitive Advantage <i>Irish Council for Science, Technology & Innovation (ICSTI)</i>	April 2003

Design & Development <i>Irish Council for Science, Technology & Innovation (ICSTI)</i>	April 2003
Baseline Assessment of the Public Research System in Ireland in the areas of Biotechnology and Information and Communication Technologies	April 2003
The Demand and Supply of Skills in the Food Processing Sector <i>Expert Group on Future Skills Needs</i>	April 2003
State Expenditure on Science and Technology, 2001 <i>Volume One: The Total Science & Technology Budget</i> <i>Volume Two: The Research & Development Element of the Science & Technology Budget</i>	May 2003
Statement on Inflation <i>National Competitiveness Council</i>	May 2003
Consumer Pricing Report 2003	May 2003
Embedding the PharmaChem Industry in Ireland <i>Irish Council for Science, Technology & Innovation</i>	May 2003
The Economic Appraisal System for Projects Seeking Support from the Industrial Development Agencies	May 2003
International Trade and Investment	June 2003
The Demand and Supply of Engineers and Engineering Technicians <i>Expert Group on Future Skills Needs</i>	July 2003
State Expenditure Priorities for 2004 <i>Irish Council for Science, Technology & Innovation</i>	July 2003
Annual Report, 2002	July 2003
A Comparison of Starting Salaries for Science and Engineering Graduates	August 2003
Business Expenditure on Research and Development (BERD), 2001	September 2003

Functions of Forfás

Is é Forfás an bord náisiúnta um polasáí agus comhairle le haghaidh fiontraíochta, trádála, eolaíochta, teicneolaíochta agus nuála. Is é an comhlacht é a bhfuil comhactaí dlíthiúla an stáit maidir le cur-chun-cinn tionscail agus forbairt teicneolaíochta dílsithe ann. Is é an comhlacht é freisin trína dciomnaítear cumhachtaí ar Fhiontraíocht Éireann le tionscail dúchais a chur chus cinn agus ar ghníomhaireacht Forbartha Tionscail na hÉireann (GFT Éireann) le hinfheistíocht isteach sa tír a chur chun tosaigh. Is iad feighmeanna Fhorfáis:

- ▶ comhairle a chur ar an Aire ó thaobh cúrsaí a bhaineann le forbairt tionscail sa Stát
- ▶ comhairle maidir le forbairt agus comhordú polasaithe a chur ar fáil d'Fhiontraíocht Éireann, d'GFT Éireann agus d'aon fhoras eile dá leithéid (a bunaíodh go reachtúil) a d'fhéadfadh an tAire a ainmniú trí ordú
- ▶ forbairt na tionsclaíochta, na heolaíochta, na nuála agus na teicneolaíochta, na margaíochta agus acmhainní daonna a spreagadh sa Stát
- ▶ bunú agus forbairt gnóthas tionsclaíoch ón iasacht a spreagadh sa Stát, agus
- ▶ Fiontraíocht Éireann agus GFT Éireann a chomhairliú agus a chomhordú ó thaobh a gcuide feidhmeanna.

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

- ▶ advise the Minister on matters relating to the development of industry in the State
- ▶ advise on the development and co-ordination of policy for Enterprise Ireland, IDA Ireland and such other bodies (established by or under statute) as the Minister may by order designate
- ▶ encourage the development of industry, science and technology, innovation, marketing and human resources in the State
- ▶ encourage the establishment and development in the State of industrial undertakings from outside the State, and
- ▶ advise and co-ordinate Enterprise Ireland and IDA Ireland in relation to their functions.

Board Members

Peter Cassells	<i>Chairman</i>
Martin Cronin	<i>Chief Executive, Forfás</i>
Sean Dorgan	<i>Chief Executive, IDA Ireland</i>
Dan Flinter	<i>Chief Executive, Enterprise Ireland</i>
Paul Haran	<i>Secretary General, Department of Enterprise, Trade & Employment</i>
Professor Michael Hillery	<i>Chair of Manufacturing Engineering University of Limerick</i>
Rody Molloy	<i>Director General, FÁS</i>
William Murphy	<i>Partner, Tynan Dillon and Company</i>
Feargal O'Rourke	<i>Partner, Taxation Pricewaterhouse Coopers</i>
Dr Don Thornhill	<i>Chairman, Higher Education Authority</i>
Toni Wall	<i>Managing Director, Wall-2-Wall Ltd</i>
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