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ANNUAL EMPLOYMENT SURVEY 2012

Item Type	report
Publisher	Forfás
Download date	2026-04-20 03:38:52
Link to Item	https://hdl.handle.net/20.500.14765/70210

ANNUAL
EMPLOYMENT
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2012

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Executive Summary

The Annual Employment Survey provides an analysis of employment levels in Industrial (including Primary Production) and Services companies under the remit of IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta¹. The Annual Employment Survey 2012 looks at employment trends over the 10 year period 2003 to 2012. The main findings of the 2012 survey are set out below.

Overall

Total permanent full-time employment in agency-assisted companies operating in all sectors amounted to 294,785 in 2012. This is an increase of 8,975 jobs (3.1 per cent) on employment levels in 2011 and continues the trend of positive growth in employment following three consecutive years of employment losses totalling 45,764 jobs (2007-2010). Gross job gains for 2012 are 26,005, which is slightly down on the 2011 figure of 27,201 (-4.4 per cent), and gross job losses (17,030) are at their lowest level for more than a decade.

Total full-time employment among Irish-owned companies amounted to 144,964 in 2012, an increase of 3,228 jobs (2.3 per cent) on the previous year. This increase continues the trend of positive employment growth for Irish-owned firms following the loss of 28,671 jobs between 2007 and 2010. Irish-owned companies account for 49% of total full-time employment in agency-assisted firms in 2012. Employment in Irish-owned firms had increased from 148,362 in 2003 to 166,560 in 2007 (12.3 per cent), but fell by 13 per cent (21,596 jobs) in 2012 from this recent pre-recession peak. There was a small increase of 0.2 per cent (48 jobs) in part-time temporary jobs in 2012, a continuation of a trend started in 2009, when many companies began to substitute full-time employment for part-time employment.

Among foreign-owned companies², total full-time employment amounted to 149,821 in 2012, an increase of 5,747 (4.0 per cent) on the previous year and the second year of growth. Following the dot-com bubble, employment in foreign-owned firms stood at 151,839 in 2004, increasing to 157,332 in 2006. Over the recent recession, employment in foreign-owned companies has decreased by 17,093 (10.9 per cent), over the period 2007-2010 to 140,067. In 2011, there was an increase of 4,007 jobs or 2.9 per cent over the previous year. As with Irish-owned companies, foreign-owned part-time employment also increased, by 593 jobs (3.4 per cent) in 2012.

Regional

All regions saw increases in employment levels over 2011, giving a consecutive year of employment growth for all regions. The South and East (S&E) region excluding Dublin remains the largest region in employment terms, accounting for 123,250, or 41.8 per cent, of total agency employment followed by the Dublin region, with 105,758 full-time jobs (35.9 per cent of the total) and the Borders, Midland and West (BMW) region with 65,777 employed (22.3 per

¹ The population of firms covered in the survey includes companies receiving assistance at any stage from these agencies or their predecessor agencies.

cent of total). Employment peaked in the South and East region in 2006, with 139,870 jobs recorded, and saw losses of 16,620 (11.9 per cent) by 2012.

Irish-owned Industrial and Services firms located in the South and East (S&E) accounted for 41.4 per cent (60,076 jobs) of total Irish-owned full-time employment in 2012, compared with 41.3 per cent (68,708 jobs) in 2007. The BMW region accounted for 25.9 per cent (37,548 jobs) of Irish-owned employment in 2012, compared with 27.4 per cent (45,605 jobs) in 2007, and the remainder were in the Dublin region.

Foreign-owned Industrial and Services firms located in the S&E accounted for 63,174 jobs in 2012, down 11.5 per cent from a peak of 71,359 jobs in 2006. In overall terms, the BMW region's share of full-time employment in foreign-owned companies has remained around 18 per cent between 2006 and 2012, despite a reduction in absolute terms of 1,222 jobs from 29,451 to 28,229 over the same period.

Sectoral

The sectoral employment breakdown shows evidence of continuing structural change in agency-assisted companies towards Services sectors. Full-time employment in all Industrial sector companies increased from 213,110 in 2003 to 214,454 in 2007 (0.6 per cent), while Services employment increased 25.4 per cent, from 87,130 in 2003 to 109,266 in 2007. Between 2007 and 2011, employment in Industry declined 18.1 per cent from 214,454 to 175,644 during the recession, while services employment increased by 9 per cent over the same period (109,266 in 2007 to 119,141 in 2012).

Total full-time jobs in the Irish-owned industrial sector amounted to 94,933 in 2012 with a total net gain of 1,104 jobs (1.16 per cent) since 2011. The sectors with the most significant net jobs gains were Food (1,224 jobs; 3.8 per cent); Computer, Electronic and Optical (292, 6.9 per cent) Machinery and Equipment (177 jobs; 3.0 per cent) and Chemicals (176 jobs; 5.9 per cent). The sectors that suffered the highest net jobs losses were Non-Metallic Minerals (-370 jobs; -7.1 per cent), Basic and Fabricated Metals (-294 jobs; -3.6 per cent) and Construction, Energy, Water and Waste (-195 jobs; -2.4 per cent).

A total of 50,031 full-time jobs were recorded in the Irish-owned Services sector in 2012, with a net gain of 2,124 jobs (4.25 per cent) over 2011. The sectors with the highest net employment gain were Computer and Consultancy Activities (1,050, 9.6 per cent) and Business Services (903 jobs; 5.7 per cent). The only substantial loss was seen in Other IT and Computer Services (-422 jobs; -18.3 per cent).

In the foreign-owned industrial sector, total full-time jobs amounted to 80,711 in 2012 with a total net gain of 1,499 jobs (1.9 per cent) since 2011. The sectors with the most significant net jobs gains were Computer, Electronic and Optical equipment (483 jobs; 3.4 per cent); Medical and Dental Instruments and Supplies (356 jobs; 1.7 per cent), and Food (151 jobs; 2.8 per cent). The sector that suffered the highest net jobs losses was Textiles (-45 jobs; -40.5 per cent).

A total of 69,110 full-time jobs were recorded in the foreign-owned Services sector in 2012, with a very substantial net gain of 4,248 jobs (6.5 per cent) over 2011. The subsectors with the highest net employment gains were Computer Programming Activities (1,943 jobs; 9.7 per cent) and Computer Facilities Management (1,159 jobs; 15.1 per cent).

Introduction

This document sets out the final results of the 2012 Forfás Annual Employment Survey³. The survey is an annual census of employment in all manufacturing and services companies supported by the enterprise development agencies (IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta). The survey 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 and Údarás na Gaeltachta carry out the survey for companies falling within their remit and provide the results for inclusion in the Forfás database.

The data is presented by nationality of ownership rather than in terms of development agency responsibilities and hence the cohort of foreign-owned firms includes food and beverages and natural resource subsidiaries of overseas firms that are supported by Enterprise Ireland.

The structure of the main body of the report is as follows:

- Section 1 provides overall employment trends in manufacturing and services sectors, the results of which are broken down on the basis of Irish and foreign ownership. Data on part-time, temporary and short-term contract employment are also provided for companies within the remit of Enterprise Ireland, IDA Ireland, Shannon Development⁴ and Údarás na Gaeltachta.
- Section 2 provides a regional analysis of permanent full-time employment
- Section 3 analyses the agency employment data on the basis of industrial sector.

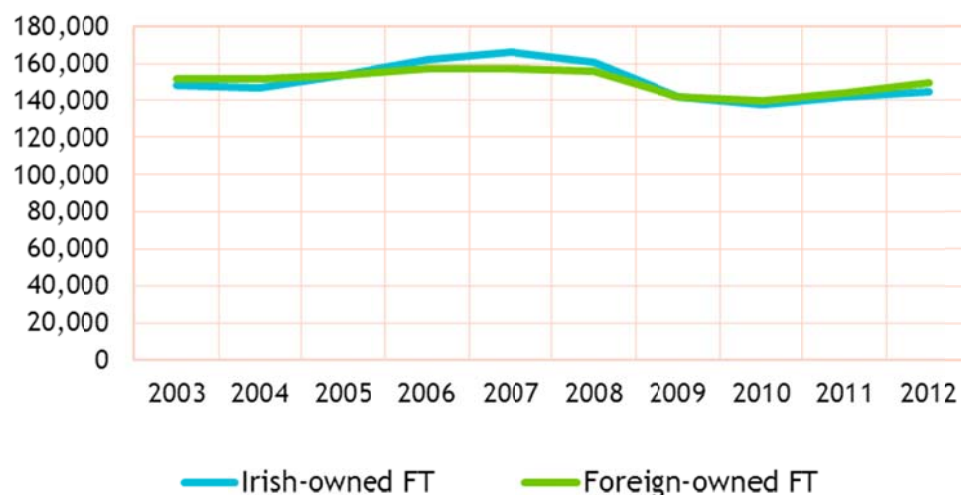
It should be noted that employment figures in this document may differ from those previously reported at year-ends due to factors such as the inclusion of new companies, revisions made by companies during the survey or the transfer of companies between Irish and foreign ownership at the end of each survey year.

³ An overview of this survey, together with the methodology and definitions used for each employee category is provided in Appendix C.

⁴ Shannon Development collected data on 'non-permanent' forms of employment since 2000.

1. Employment Trends 2003 - 2012

1.1 Trends in Permanent Full-time (FT) Employment in Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Irish	148,362	146,654	153,768	162,316	166,560	160,804	141,756	137,889	141,736	144,964
Foreign	151,878	151,839	154,000	157,332	157,160	155,832	141,796	140,067	144,074	149,821
All Ownership	300,240	298,493	307,768	319,648	323,720	316,636	283,552	277,956	285,810	294,785

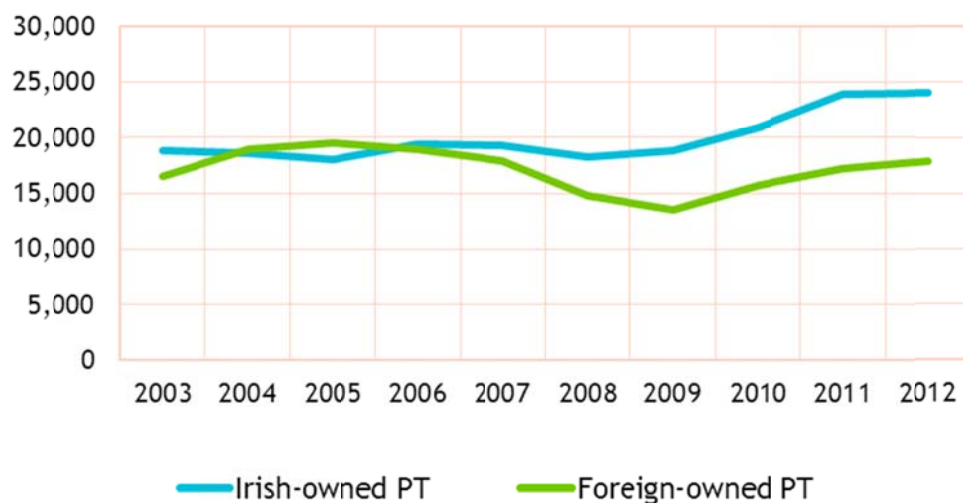
Source: Forfás Annual Employment Survey 2012

Total full-time employment among Irish-owned companies amounted to 144,964 in 2012, an increase of 2.3 per cent or 3,228 additional jobs over the previous year, continuing the upward trend since 2010. In 2011, employment increased for a consecutive year for the first time since 2007 by 3,847 jobs (2.8 per cent). Between 2007 and 2010, there was a decrease of 17.2 per cent in employment or 28,671 jobs in Irish-owned firms. In 2012, employment in Irish-owned companies was 2.3 per cent lower than in 2003, a decrease of 3,398 jobs. The highest employment losses were seen between 2008 and 2009 when Irish-owned companies shed 19,048 jobs.

Among foreign-owned companies, total full-time employment amounted to 149,821 in 2012, an increase of 5,747 jobs (4.0 per cent) over the previous year. In 2011, employment increased for a successive year for the first time since 2006 by 4,007 jobs (2.9 per cent). Between 2006 and 2010, foreign-owned companies lost 17,265 jobs and regained 9,754 over the period 2010 to 2012. Between 2003 and 2012, foreign-owned companies saw a reduction in employment of 2,057 jobs.

Total permanent, full-time employment in agency-assisted companies operating in the industrial and services sectors amounted to 294,785 in 2012, an increase of 8,975 jobs (3.1 per cent) on employment levels in 2011. Over the ten year period to 2012, illustrated above, employment has decreased by 1.8 per cent. Employment decreased from a peak of 323,720 in 2007 to 277,956 in 2010 (-14.1 per cent), but has since grown to 294,785 in 2012 (6.1 per cent).

1.2 Trends in Part-time (PT)/ Temporary/ Short-term Contract Employment in Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Irish	18,797	18,542	17,977	19,447	19,251	18,270	18,779	20,962	23,936	23,984
Foreign	16,548	18,946	19,570	18,894	17,924	14,822	13,461	15,764	17,256	17,849
All Ownership	35,345	37,488	37,547	38,341	37,175	33,092	32,240	36,726	41,192	41,833

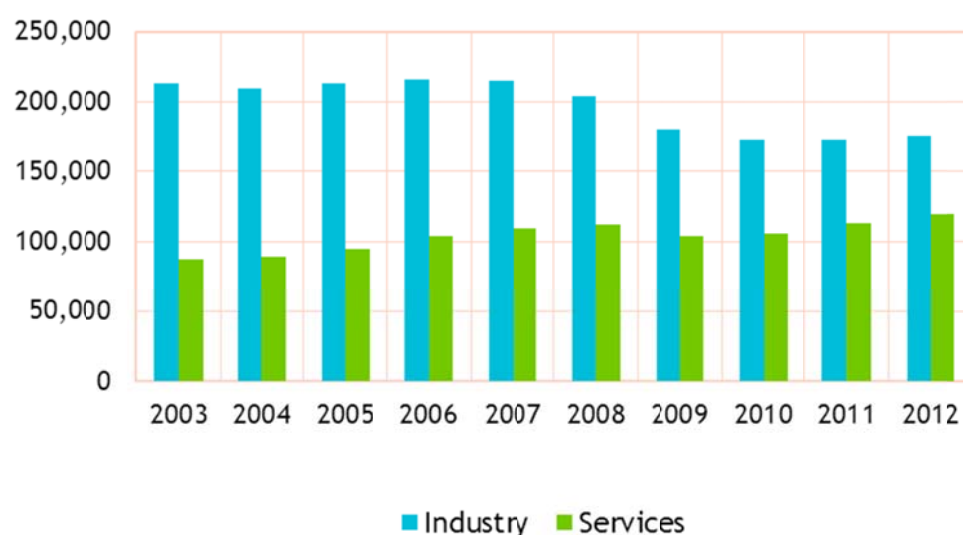
Source: Forfás Annual Employment Survey 2012

Among Irish-owned companies, there was an increase in temporary and part-time employment of 48 jobs (0.2 per cent) in 2012. The current part-time employment level of 23,984 is 5,714 (31.3 per cent) higher than in 2008, when such employment amounted to 18,270. Part-time employment increased significantly between 2008 and 2011, with 5,666 additional jobs, an annual growth rate of 9.4 per cent. This corresponds with a loss of 19,068 full time jobs in the Irish owned sector over the same period indicating perhaps that companies offered employees reduced working hours in an attempt to retain jobs whilst also keeping businesses operating.

Employment of a temporary or part-time nature among foreign-owned companies amounted to 17,849 in 2012, an increase of 593 jobs (3.4 per cent) on the previous year. This represents an increase of 4,388 (32.6 per cent) over the period 2009 to 2012, but is 8.8 per cent lower than its 10 year peak in part-time employment in 2005. In foreign owned firms the pattern shows that full-time and part time jobs decreased simultaneously during the recession.

In total, there were a further 41,833 jobs of a temporary or part-time nature recorded in agency-assisted companies in 2012. This represents an increase of 641 jobs (1.6 per cent) on the previous year and an increase of 6,488 (18.4 per cent) on the number engaged in 2003.

1.3 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Industry	213,110	209,268	212,931	215,771	214,454	204,193	179,571	172,454	173,041	175,644
Services	87,130	89,225	94,837	103,877	109,266	112,443	103,981	105,502	112,769	119,141
All sectors	300,240	298,493	307,768	319,648	323,720	316,636	283,552	277,956	285,810	294,785

Source: Forfás Annual Employment Survey 2012

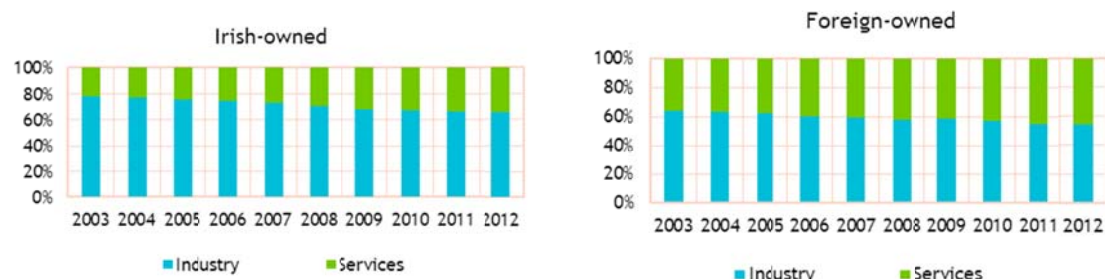
Table 1.3 segments all permanent full-time employment into Industrial⁵ and Services sectors.

Permanent full-time employment in Industry has fallen from a high of 213,110 in 2003 to its current level of 175,644 in 2012. This represents a decrease of 37,466 jobs (-17.6 per cent). Moreover, 40,127 jobs in the industrial sector have been lost since 2006. In 2012, employment in Industry increased by 2,603 jobs (1.5 per cent) from the 2011 level.

The Services sector has grown over the period 2003 - 2012, with permanent full-time employment reaching a high of 119,141 jobs in 2012. Employment in services has increased every year since 2003 with the exception of 2009 when the sector shed 8,462 jobs over 2008. The average annual growth rate in the services sector was 3.5 per cent between 2003 and 2012. Employment in the services sector increased by 15,160 jobs between 2009 and 2012 and growth in the sector has helped to offset the employment losses seen in the industrial sector. In 2012, employment in the services sector increased by 6,372 jobs (5.7 per cent) from the 2011 level.

Employment in the industrial and services sectors combined increased by 8,975 jobs (3.1 per cent) since 2011. In 2012, employment in the services sector accounted for 40 per cent of total employment compared to 40 per cent in 2003.

1.4 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in Irish and Foreign Agency-Assisted Companies, 2003-2012

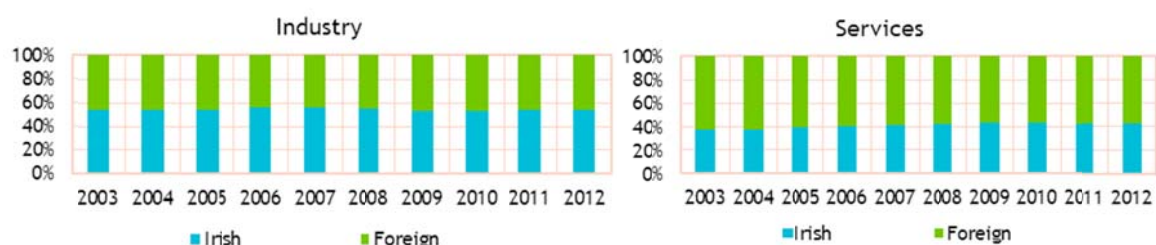


Source: Forfás Annual Employment Survey 2012

Figure 1.4 illustrates the employment in the Industrial sector and the Services sector in both Irish and foreign agency-assisted companies. The majority of both Irish and foreign employment is accounted for by the Industrial sectors. However, it is notable that over the past decade the Services sector has increased its share of total employment in Irish and foreign companies, so that it now accounts for 35 per cent and 46 per cent of total agency employment respectively.

⁵ In the course of this report, "Industry" or "Industrial sectors" includes all Manufacturing sectors, as well as Construction, Utilities and Primary Production, unless otherwise stated.

1.5 Trends in Permanent, Full-time Employment by Irish and Foreign Agency-Assisted Companies by Sector, 2003-2012



Source: Forfás Annual Employment Survey 2012

Figure 1.5 highlights how employment in Irish-owned companies compares to that of foreign-owned companies in both the Industrial and the Services sectors. In the Industrial sector, Irish-owned companies accounted for 54 per cent of full-time employment in 2012 without much fluctuation in the share over the decade. Since 2010, employment in the industrial sector increased by 2,509 jobs. Employment in Irish-owned firms in the industry sector increased from 115,661 full-time jobs in 2003 to 121,103 in 2007, but since 2007, 26,170 jobs have been lost in the sector. A similar pattern was seen in foreign-owned firms with losses of 12,640 jobs since 2007, although 1,499 additional jobs have been created in the sector since 2011.

In the services sector foreign-owned firms accounted for 58 per cent of permanent full-time employment in 2012 down from a 62 per cent share in 2003. Irish-owned services firms created 14,921 additional jobs between 2002 and 2008, followed by a decline of 2,157 between 2008 and 2010. There were 50,031 people employed in Irish-owned services firms in 2012, the highest level of employment over the decade and an increase of 53 per cent since 2003.

Foreign-owned services firms created 10,392 extra jobs between 2003 and 2008, followed by a loss of 6,112 jobs in 2009. There were 69,110 people employed in the services sector in 2012, which was the highest level of employment recorded in the sector over the decade.

1.6 Trends in Part-time, Temporary and Short-term Contract Employment by Sector in Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Industry	22,020	22,300	22,643	21,961	20,567	17,859	17,396	19,648	21,709	21,466
Services	13,325	15,188	14,904	16,380	16,608	15,233	14,844	17,078	19,483	20,367
All sectors	35,345	37,488	37,547	38,341	37,175	33,092	32,240	36,726	41,192	41,833

Source: Forfás Annual Employment Survey 2012

The above table and accompanying chart document trends in temporary and part-time employment on the basis of Industrial and Services sectors.

Within the Industrial sectors, the number in part-time employment hovered around 22,000 between 2003 and 2005. Part-time employment started decreasing in 2006 falling from 21,961 employed to 17,396 in 2009. Between 2010 and 2011, part-time employment in industry increased by 2,061 (9.5 per cent) to 21,709. In 2012, part-time employment decreased by 243 jobs to 21,466 jobs.

Temporary and part-time employment within the Services sectors has climbed fairly steadily from 13,325 in 2003 to 20,367 in 2012 - an increase of 7,042 (52.8 per cent). Between 2011 and 2012, temporary and part-time employment in Services increased by 884 (4.5 per cent).

In 2003 the services sector accounted for 37.7 per cent of all part-time employment compared with 48.7 per cent in 2013.

1.7 Job Gains, Losses & Net Change in Permanent Full-time Employment in All Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Job Gains	24,254	24,910	33,182	34,094	29,403	24,386	15,125	22,093	27,201	26,005
Job Losses	-31,397	-26,657	-23,907	-22,214	-25,331	-31,470	-48,209	-27,689	-19,347	-17,030
Job Change	-7,143	-1,747	9,275	11,880	4,072	-7,084	-33,084	-5,596	7,854	8,975

Source: Forfás Annual Employment Survey 2012

Figure 1.7 illustrates trends in gross job gains, gross job losses and net job change among all agency-assisted firms during the period 2003 - 2012.

The net change in employment comprises gross job gains (firms that have increased employment) less gross job losses (firms where employment numbers have decreased).

In the period 2003 - 2004, agency-assisted companies recorded net job losses; this was followed by a period of net job creation in 2005 - 2007. The period 2008-2010 is characterised by net job losses, with particularly heavy gross job losses in 2009. In 2011 and 2012, there were net employment gains of 7,854 and 8,975 jobs respectively. In 2012 gross job losses at 17,030 were at their lowest level for a decade.

1.8 Job Gains, Losses & Net Change in Permanent Full-time Employment in Irish-owned Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Job Gains	14,224	12,819	20,264	20,984	18,371	14,177	9,259	11,806	14,708	13,530
Job Losses	-16,286	-14,527	-13,150	-12,436	-14,127	-19,933	-28,307	-15,673	-10,861	-10,302
Change	-2,062	-1,708	7,114	8,548	4,244	-5,756	-19,048	-3,867	3,847	3,228

Source: Forfás Annual Employment Survey 2012

Figure 1.8 illustrates trends in gross job gains, gross job losses and net job change among Irish-owned firms during the period 2003 - 2012.

Over the ten year period, most jobs were created by agency assisted companies in 2006 (20,984 jobs), jobs growth declined between 2006 and 2009, with 2009 recording the most jobs lost (-28,307). From 2010 to 2012 jobs losses lessened considerably from 15,673 and 10,302 respectively.

The highest positive net change was recorded in 2006 with 8,548 jobs created and the highest negative net change was recorded in 2009 with 19,048 jobs lost. In 2011, jobs gains of 14,708 exceeded jobs losses of 10,861, resulting in a net change of 3,847 jobs created indicating a return to jobs growth, the first time since 2007. 2012 saw a successive year of positive net growth of 3,228 jobs.

1.9 Job Gains, Losses & Net Change in Permanent Full-time Employment in Foreign-owned Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Job Gains	10,030	12,091	12,918	13,110	11,032	10,209	5,866	10,287	12,493	12,475
Job Losses	-15,111	-12,130	-10,757	-9,778	-11,204	-11,537	-19,902	-12,016	-8,486	-6,728
Change	-5,081	-39	2,161	3,332	-172	-1,328	-14,036	-1,729	4,007	5,747

Source: Forfás Annual Employment Survey 2012

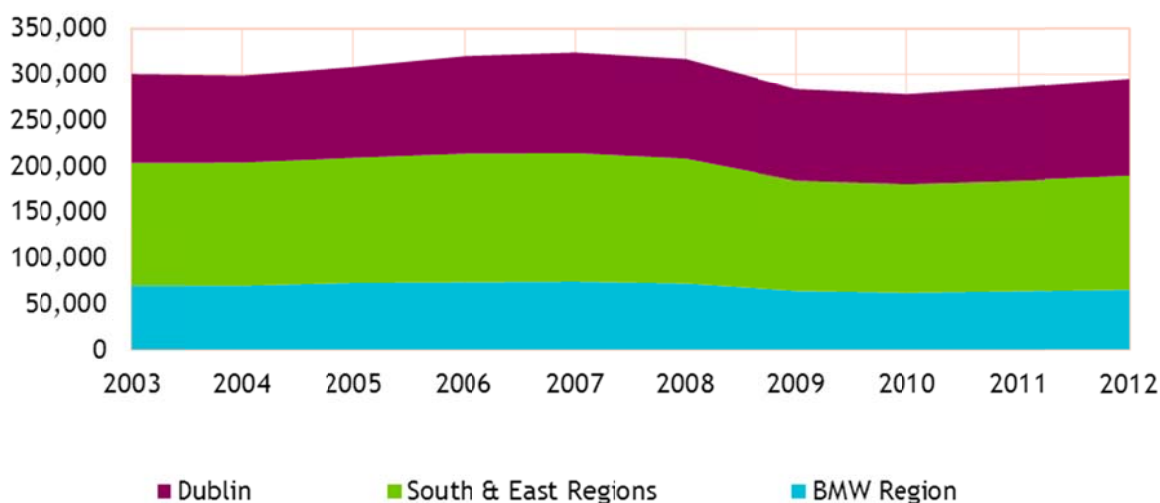
Figure 1.9 provides an overview of gross job gains, job losses and net job change in foreign-owned agency-assisted companies between 2003 and 2012.

Over the ten year period, the best year for job creation for foreign-owned firms was 2006 with 13,110 new jobs created. In 2009, the highest job losses of the decade were recorded with 19,902 jobs lost.

The highest positive net change was recorded in 2012 with 5,747 jobs created overall and the highest negative net change was recorded in 2009 with 14,036 jobs lost. In 2012, jobs gains of 12,475 exceeded jobs losses of 6,728, resulting in a net change of 5,747 jobs created and indicating a consecutive year of jobs growth.

2. Regional Employment Trends 2003-2012

2.1 Permanent Full-Time Employment (Foreign and Irish Firms) by Region



Source: Forfás Annual Employment Survey 2012

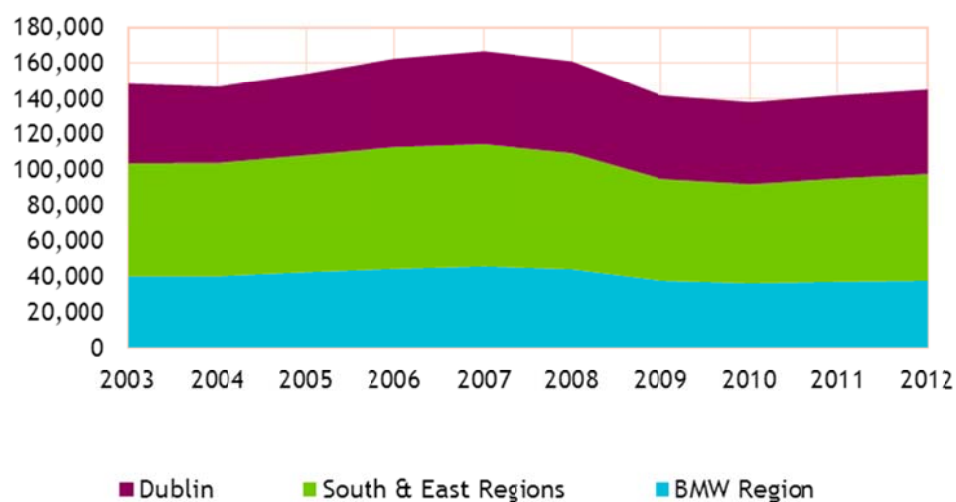
Figure 2.1 illustrates trends in permanent full-time employment in Irish-owned agency-assisted companies between 2003 and 2012. The Border, Midlands and West (BMW) region saw an increase of 1,918 jobs (3.0 per cent) in 2012 and the South & East region saw an increase of 2,978 jobs (2.5 per cent), while Dublin had an increase of 4,079 jobs (4.0 per cent).

In 2003, the BMW region accounted for 23.3 per cent of total agency-assisted employment, employing 69,930 full-time people in 2003. In 2012, the BMW region accounted for 22.3 per cent of employment but employment in the region had decreased by 5.9 per cent to 65,777. The South and East region accounted for a 44.5 per cent share of total employment in 2003 compared with a 41.8 per cent share in 2012, with employment decreasing by 10,336 (-7.7 per cent) over the period.

The Dublin region currently accounts for 35.9 per cent of total agency-assisted employment, up from 32.2 per cent in 2003. In absolute terms, employment has increased by 9,034 jobs

(9.3 per cent) in Dublin over the period. A more detailed regional breakdown of employment in Irish-owned manufacturing and services sectors is presented in Appendix B.

2.2 Permanent Full-Time Employment in Irish-owned Companies by Region, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
BMW	40,134	40,051	42,332	44,179	45,605	43,945	37,553	36,107	36,944	37,548
South & East	63,497	63,738	65,845	68,511	68,708	65,333	57,257	55,718	58,130	60,076
Dublin	44,731	42,865	45,591	49,626	52,247	51,526	46,946	46,064	46,662	47,340
All regions	148,362	146,654	153,768	162,316	166,560	160,804	141,756	137,889	141,736	144,964

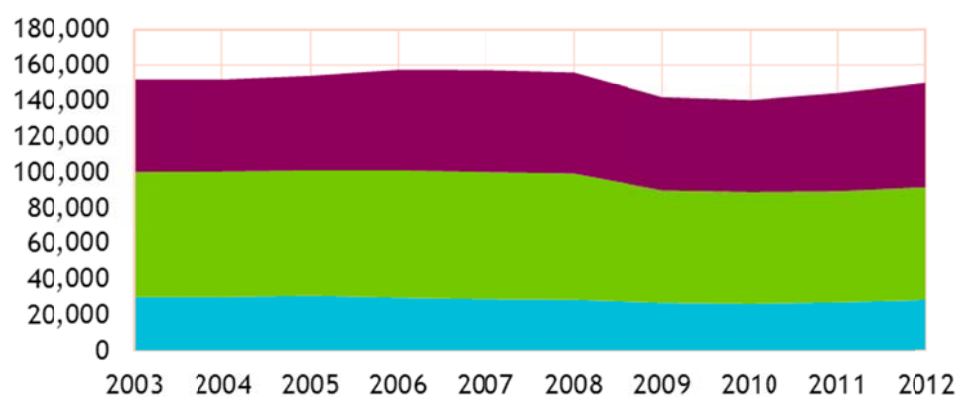
Source: Forfás Annual Employment Survey 2012

Trends in permanent full-time employment in Irish-owned agency-assisted companies are detailed above in figure 2.2. The BMW region gained 604 jobs between 2011 and 2012, an increase of 1.6 per cent. The South & East region gained 1,946 jobs an increase of 3.3 per cent, and the Dublin region gained 678 jobs, an increase of 5.8 per cent over 2011.

In 2003, the BMW region accounted for 27.1 per cent of total employment, employing 40,134 full-time staff. In 2012, the BMW region accounted for 25.9 per cent and employment numbers in the region had decreased by 6.4 per cent to 37,548. The South and East region accounted for a 42.8 per cent share of total employment in 2003 compared with a 41.4 per cent share in 2012, with employment decreasing by 3,421 (-5.4 per cent) over the period.

The Dublin region currently accounts for 32.7 per cent of total Irish-owned agency-assisted employment, up from 30.1 per cent in 2003. In absolute terms, employment has increased by 2,609 jobs (5.8 per cent) in Dublin over the period. A more detailed regional breakdown of employment in Irish-owned manufacturing and services sectors is presented in Appendix B.

2.3 Permanent Full-Time Employment in Foreign-owned Companies by Region, 2003-2012



■ Dublin ■ South & East Regions ■ BMW Region

	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
BMW	29,796	29,772	30,574	29,451	28,710	28,384	26,589	26,105	26,915	28,229
South & East	70,089	70,332	70,233	71,359	71,090	70,589	62,944	62,475	62,142	63,174
Dublin	51,993	51,735	53,193	56,522	57,360	56,859	52,263	51,487	55,017	58,418
All regions	151,878	151,839	154,000	157,332	157,160	155,832	141,796	140,067	144,074	149,821

Source: Forfás Annual Employment Survey 2012

Trends in permanent full-time employment in foreign-owned agency-assisted companies are detailed above in figure 2.3. Dublin has seen its share of foreign-owned employment grow from 34.2 per cent in 2003 to 39.0 per cent in 2012. Employment also increased by 6,425 jobs (12.4 per cent) over the 10 years.

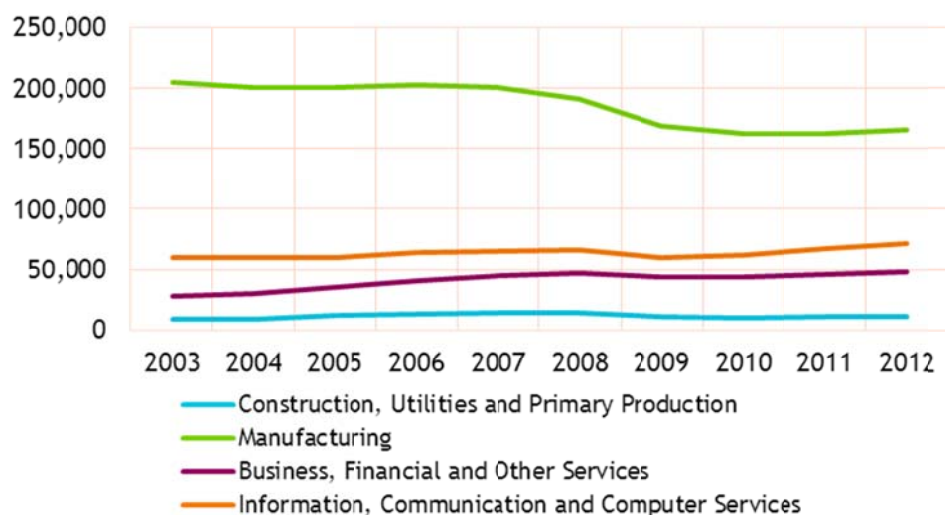
The BMW region recorded losses of 1,567 jobs (-5.3 per cent) while the South and East had the greatest number of job losses, with a reduction of 6,915 jobs (-9.9 per cent) from 2003 to 2012.

In 2012, employment in foreign-owned firms increased by 4.0 per cent or 5,747 jobs over 2011. Of these 5,747 jobs, 3,401 (59 per cent) were in the Dublin region, 1,314 (23 per cent) in the BMW region and 1,032 (18 per cent) were in the South and East regions.

A more detailed regional breakdown of employment in foreign-owned manufacturing and services sectors is presented in Appendix B.

3. Sectoral Employment Trends 2003 - 2012

3.1 Sectoral Trends in Permanent Full-Time Employment, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction, Utilities and Primary Production	8,374	8,609	12,098	12,980	13,998	13,711	11,285	10,214	10,511	10,325
Manufacturing	204,736	200,659	200,833	202,791	200,456	190,482	168,286	162,240	162,530	165,319
Business, Financial and Other Services	27,408	30,002	34,991	40,018	44,682	47,017	44,041	43,468	45,917	47,555
Information, Communication and Computer Services	59,722	59,223	59,846	63,859	64,584	65,426	59,940	62,034	66,852	71,586
All sectors	300,240	298,493	307,768	319,648	323,720	316,636	283,552	277,956	285,810	294,785

Source: Forfás Annual Employment Survey 2012

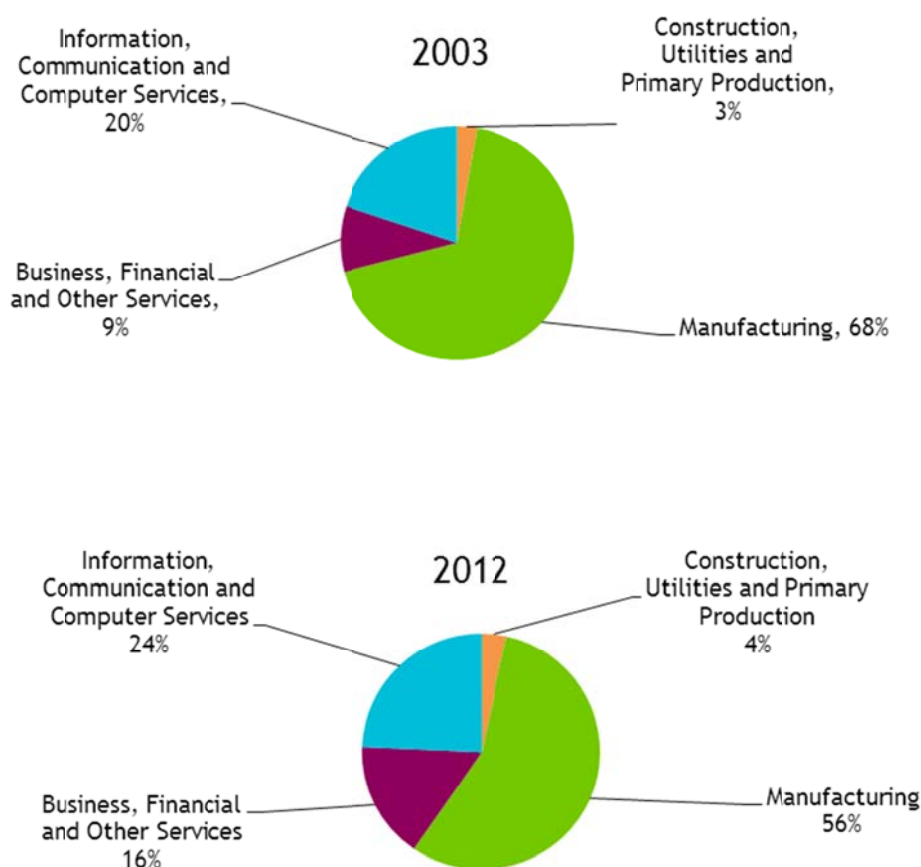
Figure 3.1 presents a sectoral breakdown of permanent full-time employment across all agency-assisted companies by broad sector. In 2012, employment increased by 8,975 or 3.1 per cent for all sectors over 2011. The Information, Communication and Computer Services sector accounted for 53 per cent of this increase creating 4,734 additional jobs. The Business, Financial and Other Services sector also recorded jobs growth of 3.6 per cent or 1,638 jobs

between 2011 and 2012. Since 2003, 20,147 jobs were created in this sector, an increase of 73.4 per cent, of which 10,217 of these jobs were created in the Financial Services sector.

The manufacturing sector has gained 2,789 jobs since 2011, a rise of 1.7 per cent but the sector has seen a loss of 39,417 jobs or 19.3 per cent since 2003. However, within the manufacturing sector the Medical and Dental Instruments and Supplies sector had employment growth of 32 per cent or 5,358 jobs since 2003. The Food sector had an increase in employment of 3.7 per cent since 2011 or 1,375 jobs. Since 2003, however, employment in the Food sector declined by 8 per cent with a loss of 3,388 jobs.

The development agencies support enterprises in the Construction, Utilities and Primary Production sectors that are internationally trading, which is a relatively small proportion of these sectors overall, and was the only category to record a fall in employment in 2012, dropping by 1.8 per cent. This category of agency-supported internationally trading enterprises has seen employment gains of 1,951 jobs or 23.3 per cent since 2003.

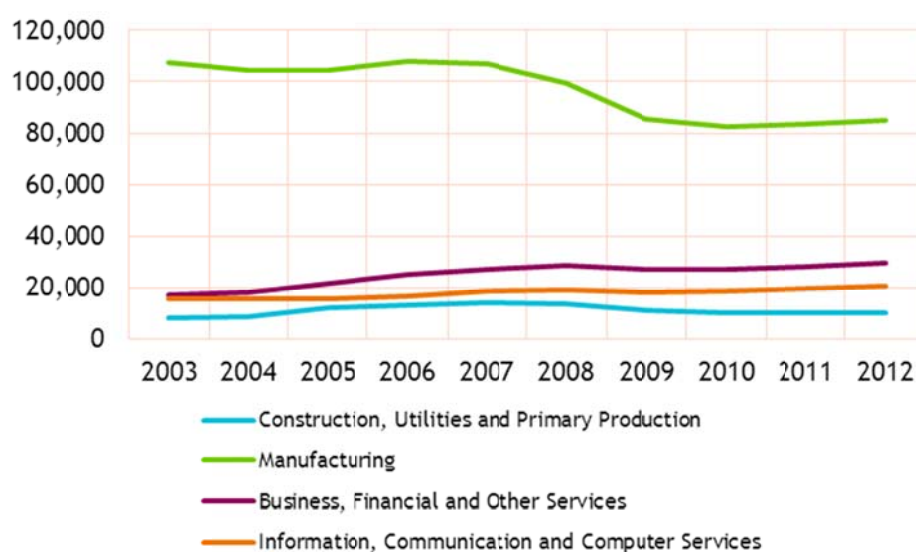
3.2 Sectoral Proportions in Permanent Full-Time Employment, 2003 and 2012



Source: Forfás Annual Employment Survey 2012

As a share of total agency-assisted company employment, manufacturing has fallen from 204,736 in 2003 (68 per cent of total employment) to 165,319 in 2012 (56 per cent of total employment). Alongside a 74 per cent absolute increase in employment between 2003 and 2012, the business, financial and other services sector has almost doubled its share of total employment from 9 to 16 per cent over the same period. The construction, utilities and primary production sector and the information, communications and computer services sector groupings each saw small increases in shares of total employment between 2003 and 2012.

3.3 Sectoral Trends in Permanent Full-time Employment within Irish-Owned Agency-Assisted Companies, 2003-2012



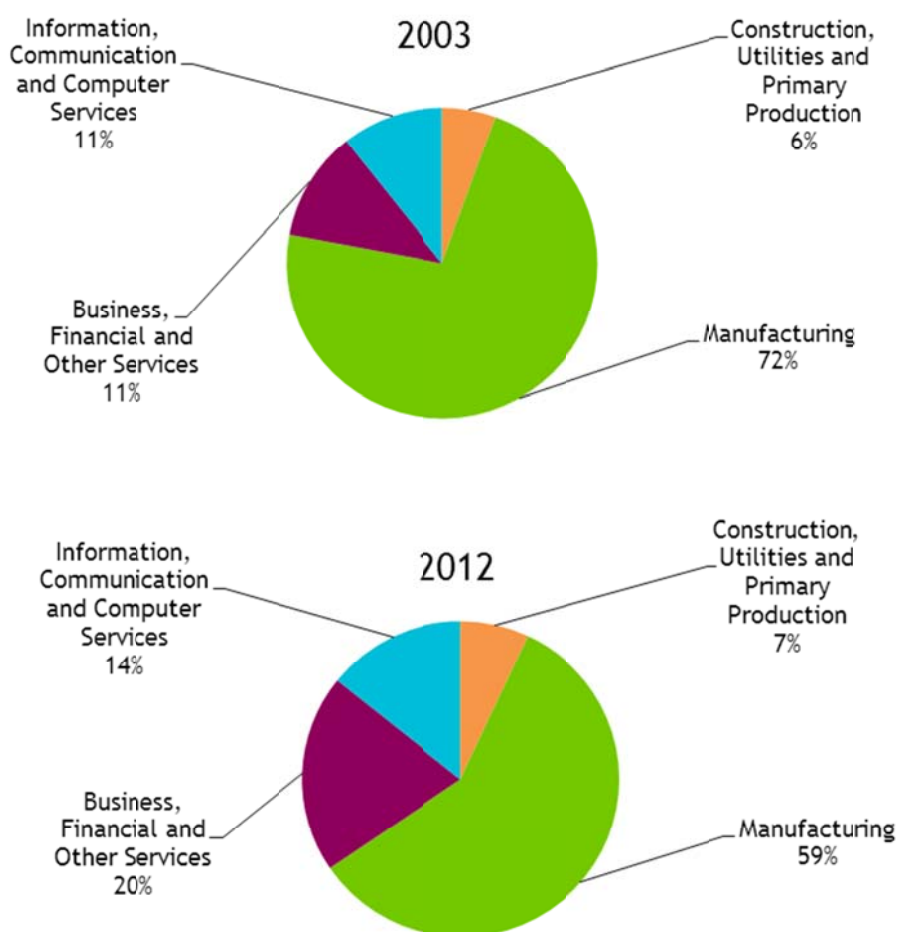
	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction, Utilities and Primary Production	8,254	8,504	11,995	12,874	13,894	13,612	11,191	10,105	10,350	10,066
Manufacturing	107,407	104,593	104,566	107,892	107,209	99,570	85,293	82,319	83,479	84,867
Business, Financial and Other Services	16,863	17,891	21,534	24,912	26,995	28,700	27,225	27,007	28,184	29,367
Information, Communication and Computer Services	15,838	15,666	15,673	16,638	18,462	18,922	18,047	18,458	19,723	20,664
All sectors	148,362	146,654	153,768	162,316	166,560	160,804	141,756	137,889	141,736	144,964

Source: Forfás Annual Employment Survey 2012

Figure 3.3 presents a sectoral breakdown of permanent full-time employment across Irish-owned companies by broad sector. In 2012, employment increased by 3,228 jobs or 2.3 per cent for all sectors over 2011. Manufacturing jobs increased by 1,388 since 2011, up 1.7 per cent on 2011 and 88 per cent of these additional jobs were created in the Food sector. Since 2003, however, the manufacturing sector has seen a loss of 22,540 jobs. The Business, Financial and Other Services sector saw growth of 4.2 per cent in employment, or 1,183 jobs since 2011. Over the 10 year period this sector has seen employment growth of 74.2 per cent or 12,504 jobs with the Business Services sector accounting for 8,270 jobs. The Information, Communication and Computer Services sector created 941 additional jobs since 2011, up 4.8 per cent on 2011.

Employment in the Construction, Utilities and Primary Production sector has decreased by 284 jobs (2.7 per cent) in 2012, but the sector has seen an increase of 22 per cent or 1,812 jobs since 2003. A detailed sectoral breakdown of employment in Irish-owned Manufacturing and Services is presented in Appendix A.

3.4 Sectoral Proportions in Permanent Full-time Employment, 2003 and 2012



Source: Forfás Annual Employment Survey 2012

As a share of total Irish-owned company employment, manufacturing has fallen from 107,407 in 2003 (72 per cent of total employment) to 84,867 in 2012 (59 per cent of total employment). The Business, Financial and Other Services has seen its share increase from 11 to 20 per cent between 2003 and 2012 alongside a 74 per cent absolute increase in employment over the same period. The Construction, Utilities and Primary Production and Information, Communications and Computer Services sector groupings each saw small increases in shares of total employment between 2003 and 2012.

3.5 Sectoral Analysis of Permanent Full-time Employment in Industry and Services 2012, Irish Companies

	Full time jobs	Full time gains	Full time losses	Full time change	Full Time Change over 2011
Manufacturing	92,698	7,348	6,155	1,193	1.3%
Basic and Fabricated Metal Products	7,868	644	938	-294	-3.6%
Chemicals	3,140	300	124	176	5.9%
Clothing, Footwear and Leather	1,193	47	100	-53	-4.3%
Computer, Electronic and Optical Equipment	4,505	452	160	292	6.9%
Drink and Tobacco	1,655	49	121	-72	-4.2%
Electrical Equipment	2,436	256	123	133	5.8%
Food	33,421	2,775	1,551	1,224	3.8%
Machinery and Equipment	6,109	534	357	177	3.0%
Medical and dental instruments and supplies	728	107	3	104	16.7%
Miscellaneous Manufacturing	4,456	421	414	7	0.2%
Non-Metallic Minerals	4,838	299	669	-370	-7.1%
Paper and Printing	4,977	386	292	94	1.9%
Rubber and Plastics	3,557	342	301	41	1.2%
Textiles	1,135	57	62	-5	-0.4%
Transport Equipment	1,308	102	119	-17	-1.3%
Wood and Wood Products	3,541	160	209	-49	-1.4%
Construction, Energy, Water and Waste	7,831	417	612	-195	-2.4%

	Full time jobs	Full time gains	Full time losses	Full time change	Full Time Change over 2011
Primary Production	2,235	120	209	-89	-3.8%
Agriculture, Fishing and Forestry	1,253	82	95	-13	-1.0%
Mining and Quarrying	982	38	114	-76	-7.2%
Services	50,031	6,062	3,938	2,124	4.4%
Business Services	16,881	2,011	1,108	903	5.7%
Financial Services	4,410	400	209	191	4.5%
Computer consultancy activities	11,966	1,763	713	1,050	9.6%
Computer facilities management activities	35	7	3	4	12.9%
Computer programming activities	619	161	32	129	26.3%
Other Information and Communication	6,164	739	559	180	3.0%
Other information technology and computer service activities	1,880	227	649	-422	-18.3%
Other Services	8,076	754	665	89	1.1%
Total - Irish owned	144,964	13,530	10,302	3,228	2.3%

Source: Forfás Annual Employment Survey 2012

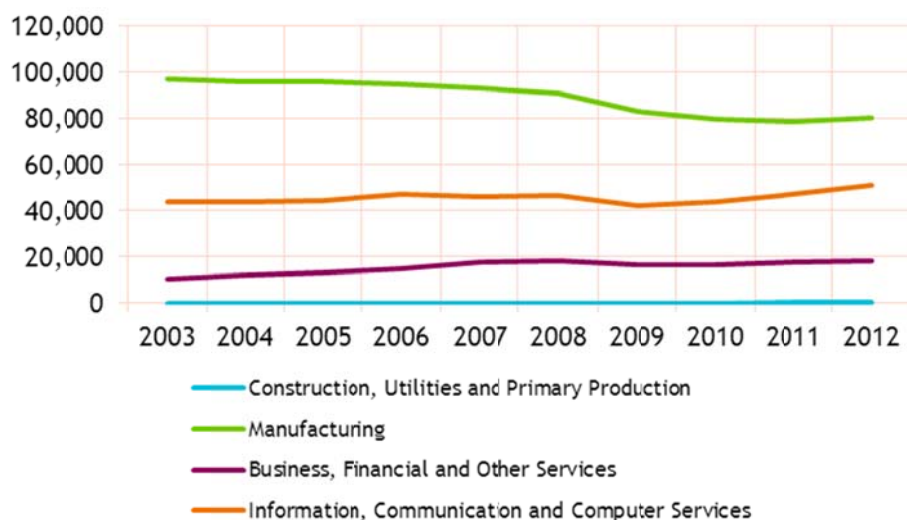
Table 3.5 provides a sectoral analysis of permanent, full-time employment for Irish-owned firms in 2012 along with job gains and losses over the corresponding 2011 figures. It also provides net percentage change in employment between 2011 and 2012.

From table 3.5 we can see that the majority (63.9 per cent) of Irish-owned employment continues to be found in the manufacturing sector. This sector has seen the loss of 6,155 jobs in 2012, with job gains of 7,348, resulting in a net gain of 1,193 jobs, indicating an upward swing in net change in employment. The sectors that suffered the highest negative net change in manufacturing were non-metallic minerals (-370 jobs) and basic and fabricated metals (-294 jobs) and construction, energy, water & waste (-195 jobs). The sectors with the highest positive net change were Food (1,224 jobs), computer, electronic and optical equipment (292) and machinery and equipment (177 jobs). The Medical and Dental Instruments sector had a net increase of 16.7 per cent in employment equating to 104 additional jobs and the highest proportional net change in 2012.

The Services sectors account for 34.5 per cent of Irish agency-assisted employment. This sector created 6,062 jobs in 2012 and recorded losses of 3,938, resulting in a net gain of 2,124 jobs (4.4 per cent). The sectors with the highest positive net change were computer

consultancy activities (1,050 jobs) and business services (903 jobs). The only substantial loss in the services sector was the other information and technology sector (-422 jobs) a decrease of 18.3 per cent.

3.6 Sectoral Trends in Permanent Full-time Employment within Foreign-owned Agency-Assisted Companies, 2003-2012



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Construction, Utilities and Primary Production	120	105	103	106	104	99	94	109	161	259
Manufacturing	97,329	96,066	96,267	94,899	93,247	90,912	82,993	79,921	79,051	80,452
Business, Financial and Other Services	10,545	12,111	13,457	15,106	17,687	18,317	16,816	16,461	17,733	18,188
Information, Communication and Computer Services	43,884	43,557	44,173	47,221	46,122	46,504	41,893	43,576	47,129	50,922
All sectors	151,878	151,839	154,000	157,332	157,160	155,832	141,796	140,067	144,074	149,821

Source: Forfás Annual Employment Survey 2012

Figure 3.6 and the accompanying table present a sectoral analysis of employment in foreign-owned Manufacturing and Services companies.

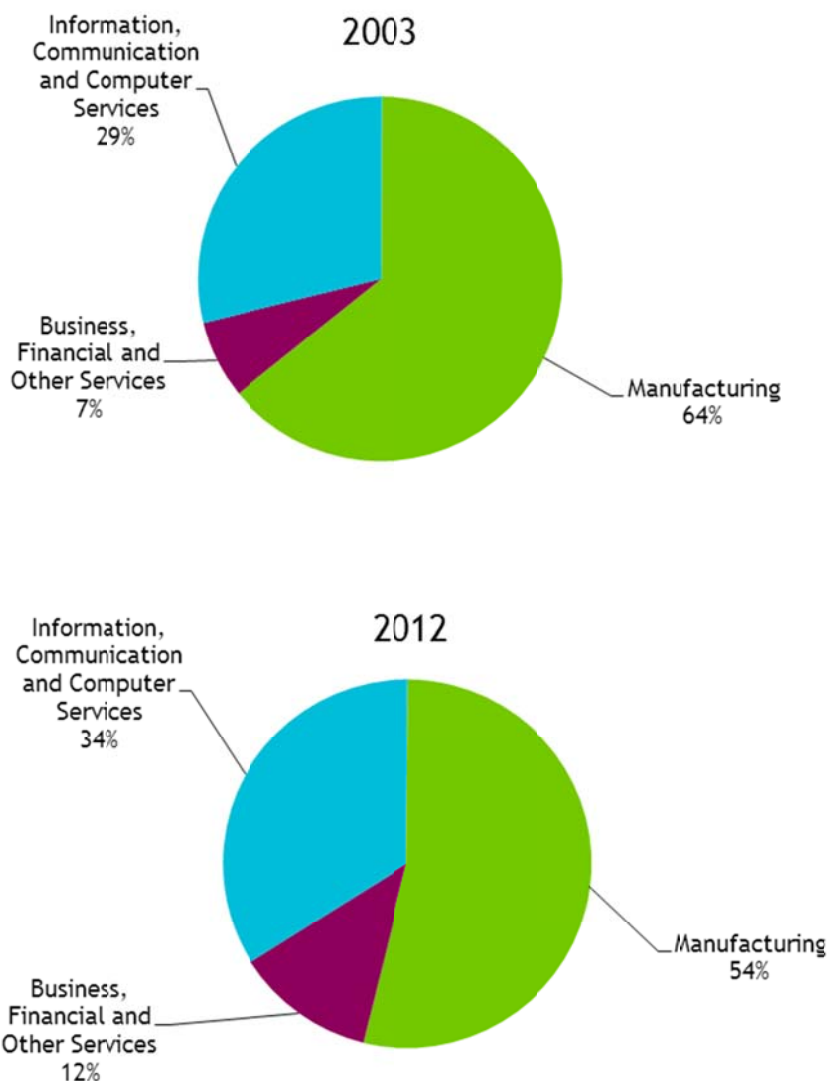
Manufacturing has seen the greatest job losses in foreign-owned employment in the period 2003 to 2012. Foreign companies in this sector have shed 16,877 jobs in this period, a reduction of 17.3 per cent. Despite the reduction, this sector remains the largest foreign-owned employer accounting for 53.7 per cent of employment in 2012. Foreign-owned

companies employ a negligible number of employees in Construction, Utilities and Primary Production.

The Services sectors have seen more buoyant employment numbers over the period 2003 to 2012. In similar fashion to Irish-owned companies, employment in the Business, Financial and Other Services sector almost doubled from 10,545 employed in 2003 to 18,188 in 2012. Information, Communication and Computer Services also had a good year in 2012 (up 3,793 jobs, or 8 per cent).

A detailed sectoral breakdown of employment in foreign-owned Manufacturing and Services sectors is presented in Appendix A.

3.7 Sectoral Proportions in Permanent Full-time Employment within Foreign-owned Agency-Assisted Companies, 2003 and 2012



Source: Forfás Annual Employment Survey 2012

Figure 3.7 depicts the proportion of agency-assisted employment for each sector in the economy in 2003 and in 2012. Construction, Utilities and Primary Production employment shares are not shown above due to their negligible proportions. Notable are the reduced share of Manufacturing jobs and the increases in the Services sectors. Business, Financial and Other Services have increased their proportion of employment from 7 to 12 per cent, and Information, Communication and Computer Services from 29 to 34 per cent.

3.8 Sectoral Analysis of Permanent Full-time Employment in Industry and Services 2012, Foreign Companies

	Full time jobs	Full time gains	Full time losses	Full time change	Full Time Change over 2011
Manufacturing	80,501	4,158	2,756	1,402	1.8%
Basic and Fabricated Metal Products	1,943	103	91	12	0.6
Chemicals	18,901	1,074	1,002	72	0.4
Clothing, Footwear and Leather	43	1	0	1	2.4
Computer, Electronic and Optical Equipment	14,774	859	376	483	3.4
Drink and Tobacco	3,192	54	34	20	0.6
Electrical Equipment	1,892	187	114	73	4.0
Food	5,550	279	128	151	2.8
Machinery and Equipment	3,787	222	111	111	3.0
Medical and dental instruments and supplies	21,165	870	514	356	1.7
Miscellaneous Manufacturing	1,599	36	39	-3	-0.2
Non-Metallic Minerals	881	129	80	49	5.9
Paper and Printing	594	37	23	14	2.4
Rubber and Plastics	2,810	142	72	70	2.6
Textiles	66	5	50	-45	-40.5
Transport Equipment	2,737	145	101	44	1.6
Wood and Wood Products	518	14	21	-7	-1.3
Construction, Energy, Water and Waste	49	1	0	1	2.1

	Full time jobs	Full time gains	Full time losses	Full time change	Full Time Change over 2011
Primary Production	210	192	95	97	85.8%
Agriculture, Fishing and Forestry	210	192	95	97	85.8
Services	69,110	8,125	3,877	4,248	6.5%
Business Services	446	175	207	-32	-6.7
Financial Services	17,233	2,107	1,648	459	2.7
Computer consultancy activities	15,096	899	1,082	-183	-1.2
Computer facilities management activities	8,815	1,375	216	1,159	15.1
Computer programming activities	21,925	2,354	411	1,943	9.7
Other Information and Communication	317	138	73	65	25.8
Other information technology and computer service activities	4,769	961	152	809	20.4
Other Services	509	116	88	28	5.8
Total - Foreign	149,821	12,475	6,728	5,747	4.0%

Source: Forfás Annual Employment Survey 2012

Table 3.8 presents the sectoral composition of permanent full-time jobs, job gains and losses and net employment change in foreign-owned agency-assisted companies in 2012.

Within Manufacturing, employment grew overall by 1,402 jobs to 80,501 jobs, an increase of 1.8 per cent over 2011. Net increases in employment were driven by the Computer, Electronic and Optical Equipment Sector (483 jobs; 3.4 per cent); Medical and Dental Instruments (356 jobs; 1.7 per cent); Food (151 jobs; 2.8 per cent) and Machinery and Equipment (111 jobs; 3.0 per cent). The Chemicals sector saw significant losses of 1,002 jobs in 2012, which was compensated for by gains of 1,074 jobs in the sector. These losses are partially due to drugs coming off patent in 2012.

Within the Services sector, employment grew overall by 4,248 jobs (6.5 per cent) to 69,110 jobs. Key drivers of this overall increase was a 9.7 per cent (1,943 jobs) growth in the number employed in Computer Programming activities and Computer Facilities Management (1,159 jobs; 15.1 per cent); Other Information Technology also saw an increase of 809 jobs (20.4 per cent) in 2012. Financial Services also performed well in 2012, up 459 jobs (2.7 per cent) on 2011.

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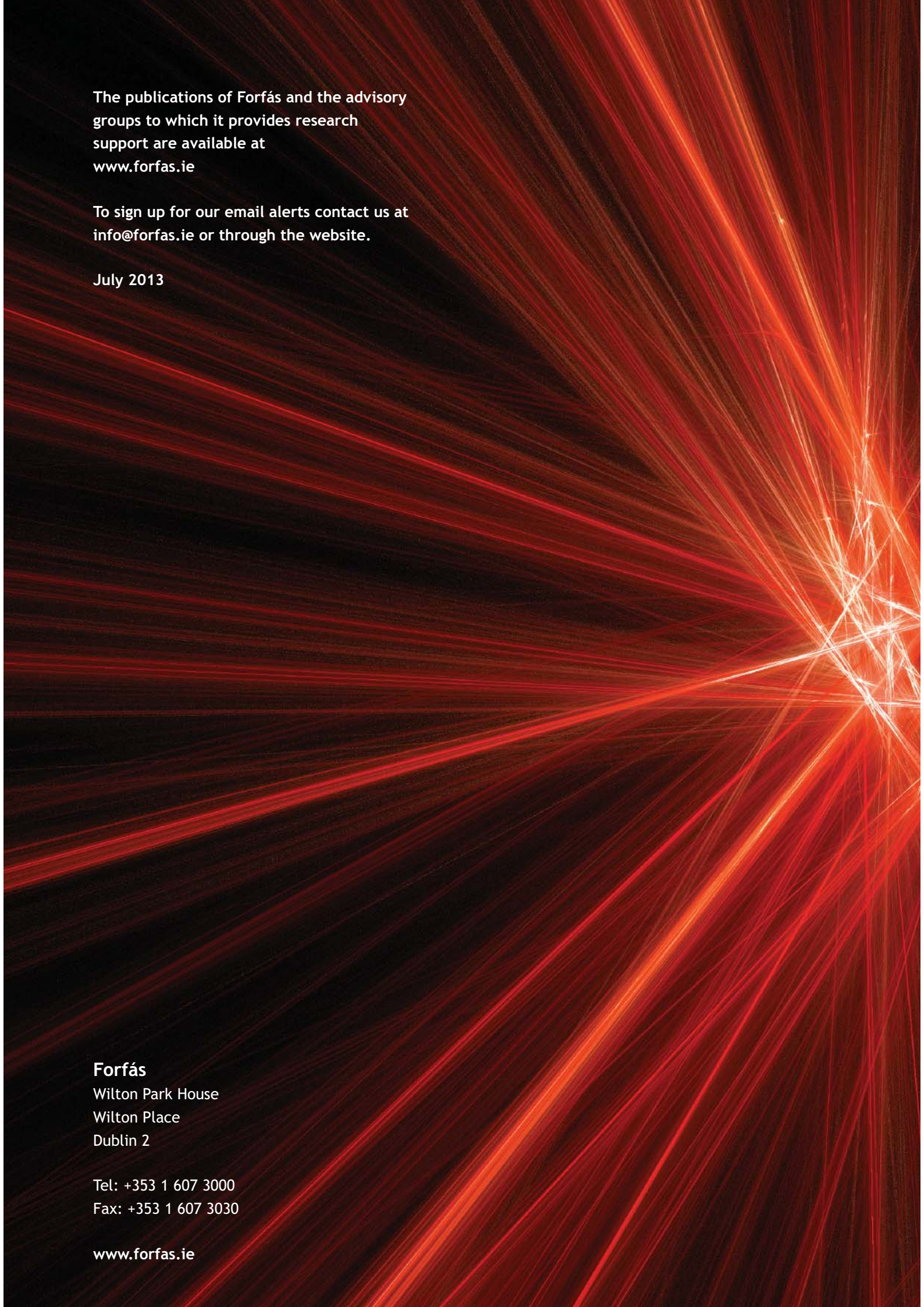
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July 2013

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