

Annual Employment Survey

2014



An Roinn Post, Fiontar agus Nuálaíochta
Department of Jobs, Enterprise and Innovation

Strategic Policy Division

Table of Contents

Table of Contents	2
Executive Summary	4
Introduction	6
Chapter 1: Employment Trends 2005 -2014	7
1.1 Trends in Permanent Full-time (FT) Employment in Irish and Foreign-owned Agency-Assisted Companies, 2005-2014	7
1.2 Trends in Part-time/Temporary/ Short-term Contract Employment in Irish and Foreign-owned Agency-Assisted Companies, 2005-2014	8
1.3 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in All Agency-Assisted Companies, 2005-2014	9
1.4 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in Irish and Foreign Agency-Assisted Companies, 2005-2014	10
1.5 Trends in Permanent, Full-time Employment in Irish and Foreign Agency-Assisted Companies by Industry and Service Sectors, 2005-2014	10
1.6 Trends in Part-time, Temporary and Short-term Contract Employment by Sector in All Agency-Assisted Companies, 2005-2014	11
1.7 Job Gains, Losses & Net Change in Permanent Full-time Employment in All Agency-Assisted Companies, 2005-2014	12
1.8 Job Gains, Losses & Net Change in Permanent Full-time Employment in Irish-owned Agency-Assisted Companies, 2005-2014	13
1.9 Job Gains, Losses & Net Change in Permanent Full-time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014	14
Chapter 2: Regional Employment Trends 2005-2014	15
2.1 Permanent Full-Time Employment in All Agency-Assisted Companies by Region, 2005-2014	15
2.2 Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies by Region, 2005-2014	16
2.3 Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies by Region, 2005-2014	17
Chapter 3: Sectoral Employment Trends 2005-2014	18
3.1 Sectoral Trends in Permanent Full-Time Employment in All Agency-Assisted Companies, 2005-2014	18
3.2 Sectoral Proportions in Permanent Full-Time Employment in All Agency-Assisted Companies, 2005-2014	20
3.3 Sectoral Trends in Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies, 2005-2014	21

3.4 Sectoral Proportions in Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies, 2005-2014	22
3.5 Sectoral Analysis of Permanent Full-Time Employment in Industry and Services in Irish-owned Agency-Assisted Companies, 2014	23
3.6 Sectoral Trends in Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014	25
3.7 Sectoral Proportions in Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014	26
3.8 Sectoral Analysis of Permanent Full-Time Employment in Industry and Services in Foreign-owned Agency-Assisted Companies, 2014	27

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 and Údarás na Gaeltachta¹. This 2014 Annual Employment Survey report looks at employment trends over the 10-year period 2005 to 2014. The main findings of the 2014 survey are set out below.

Overall Employment

Total permanent, full-time employment in agency-assisted companies operating in the industrial and services sectors amounted to 319,597 in 2014, an increase of 15,424 jobs (5.1%) on 2013 employment levels and continues the trend of positive growth in employment since 2011. Gross job gains for 2014 are 29,985, which is up on the 2013 figure of 26,127 and gross job losses (14,561) are at their lowest level for more than a decade. Part-time and temporary employment in agency assisted firms increased by 199 jobs in 2014 to reach 42,818, the highest number recorded in the ten year time series.

Total full-time employment among Irish-owned companies amounted to 158,829 in 2014, an increase of 7,919 jobs (5.2%) over 2013. This increase continues the four-year trend of positive employment growth for Irish-owned firms following the loss of 22,360 jobs between 2007 and 2009. Irish-owned companies account for 49.7% of total full-time employment in agency-assisted firms in 2014 compared with a 50.8% share in 2005. Employment in Irish-owned firms had increased from 156,679 in 2005 to 170,058 in 2007 (8.5%), but fell by 6.6% (11,229 jobs) in the period 2007-2014 from the pre-recession peak. There was also an increase of 5.1% (1,170 jobs) in part-time temporary jobs in 2014 to 24,202, a continuation of a trend started in 2009.

Among foreign-owned companies, total full-time employment amounted to 160,768 in 2014, an increase of 7,505 jobs (4.9%) on the previous year and the fourth successive year of growth. Employment in foreign-owned firms stood at 151,768 in 2005, increasing to 155,064 in 2007. Full-time employment in foreign-owned companies has surpassed the 2007 peak before the recession, with 5,704 more jobs (3.7%) in 2014 than at the peak in 2007. Foreign-owned part-time temporary employment decreased by 971 jobs (-5%) since 2013.

Regional Employment

The Border Midlands and West (BMW), Dublin, and the South and East (S&E) regions saw increases in employment levels over 2013 levels, giving a fourth year of employment growth for those regions. The South and East (S&E) region excluding Dublin remains the largest region in employment terms, accounting for 132,194 jobs, or 41.4%, of total agency employment, followed by the Dublin region with 115,768 full-time jobs (36.2%) and the Border, Midland and West (BMW) region with 71,635 employed (22.4%). Employment peaked in the South and East region in 2007, with 138,854 jobs recorded, and has seen a reduction of 6,660 jobs by 2014.

Irish-owned firms located in the S&E accounted for 41.8% (66,437 jobs) of total Irish-owned full-time employment in 2014, up from 57,712 in 2010 or an increase of 15.2% from the

¹ Firms formerly surveyed as Shannon Development client companies (which ceased as an entity in 2013) have been integrated into the Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta client cohorts, since the 2013 survey.

lowest point in 2010 but some way off the peak in 2007 of 69,154 jobs. The BMW region accounted for 26.5% (42,057 jobs) of Irish-owned employment in 2014, up from 38,524 jobs in 2010, but some way off the 2007 peak of 47,228 jobs. Dublin-based Irish client companies accounted for 50,335 jobs in 2014 (31.7% of the total), up 2,551 (5.3%) on 2013, but some 6,330 jobs less than the 2007 peak of 53,676 jobs.

Foreign-owned Industrial and Services firms located in the S&E accounted for 65,757 jobs in 2014 (40.9% of all regions), up 2,389 jobs (3.8%) on the previous year, but 4,184 jobs less than the 2006 peak of 69,941. In overall terms, the BMW region's share of full-time employment in foreign-owned companies is 18.4% and has remained relatively static as a percentage share over recent years. Permanent jobs in the BMW region were at their highest level in 2005 (29,798) and were in decline until 2010 (25,292) and have been on an increasing trajectory since then. Foreign-owned client companies in the Dublin region accounted for 65,433 jobs, the highest number recorded over the decade. Dublin accounts for 41% of nationwide on a par with employment in the South and East region

Sectoral Employment

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 to 185,545 in 2014, up from 180,723 in 2013 (a rise of 4,822, 2.7%). Services employment increased more significantly to 134,052, up from 123,450 in 2013 (a rise of 10,602, 8.6%).

Total full-time jobs in the Irish-owned industrial sector amounted to 103,747 in 2014, up from 100,355 in 2013, a net gain of 3,392 jobs (3.4%). The sub-sectors with the most significant net jobs gains in 2014 were: Food (1,751 jobs), Computer, Electronic and Optical Equipment (400 jobs) and Machinery and Equipment (352 jobs). Proportionately, the sub-sectors that gained most employment were: Medical and Dental Instruments and Supplies 10.4%, and Electrical Equipment 10%. The most significant negative net changes were reported in the Construction, Energy, Water and Waste sub-sector (-498 jobs) and Chemicals (-134 jobs).

A total of 55,082 full-time jobs were recorded in the Irish-owned Services sector in 2014, with a net gain of 4,527 jobs (9%) over 2013. The sub-sectors with the highest net employment gains in 2013 were: Business Services (2,432 jobs) and Computer Consultancy Activities (600 jobs). Proportionately, the sub-sectors that gained most employment were: Other Information Technology and Computer Service Activities (16.8%) and Business Services (15%). There were no negative net changes reported in Irish-owned Services sectors.

In the foreign-owned industrial sector, total full-time jobs amounted to 81,798 in 2014, up from 80,368 in 2013, with a net gain of 1,430 jobs (1.8%) since 2013. The sub-sectors with the most significant net jobs gains in 2014 were: Medical and Dental Instruments and Supplies (1,304 jobs), Computer, Electronic and Optical Equipment (782 jobs) and Chemicals (96 jobs). In proportionate terms the significant sub-sectors that fared best in 2014 over 2013 in terms of employment net change were: Agriculture, Fishing and Forestry (19.2%) and Construction, Energy, Water and Waste 7.2%).

A total of 78,970 full-time jobs were recorded in the foreign-owned Services sector in 2014, with a very substantial net gain of 6,075 jobs (8.3%) over 2013. The sub-sectors with the highest net employment gains were: Computer Programming Activities (2,662 jobs) and Financial Services (1,283 jobs). Proportionately, the sub-sectors that gained most employment were: Other Information and Communication Services (34.6%) and Business Services (25.8%).

Introduction

This document sets out the results of the 2014 Department of Jobs, Enterprise and Innovation (DJEI), Annual Employment Survey. The survey is an annual census of employment in all manufacturing and services companies supported by the enterprise development agencies (IDA Ireland, Enterprise Ireland, and Údarás na Gaeltachta). The survey has been carried out each year since 1972. DJEI, 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. Údarás na Gaeltachta carries out the survey for companies falling within its remit and provides the results for inclusion in the DJEI database. Companies formerly surveyed as Shannon Development companies have been incorporated into either the IDA Ireland or Enterprise Ireland client portfolios since 2013.

The data is presented by nationality of ownership rather than in terms of the parent development agency, 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 and Údarás na Gaeltachta.
- Section 2 provides a regional analysis of permanent/full-time employment.
- Section 3 analyses the permanent/full-time 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 on the agency client lists, revisions made by companies during the survey or the transfer of companies between Irish and foreign ownership at the end of each survey year.

The Department of Jobs, Enterprise and Innovation would like to thank the many respondents to this survey who have taken the time to gather information and complete the data requests for this key area of Government policy.

For further information on this survey please contact:

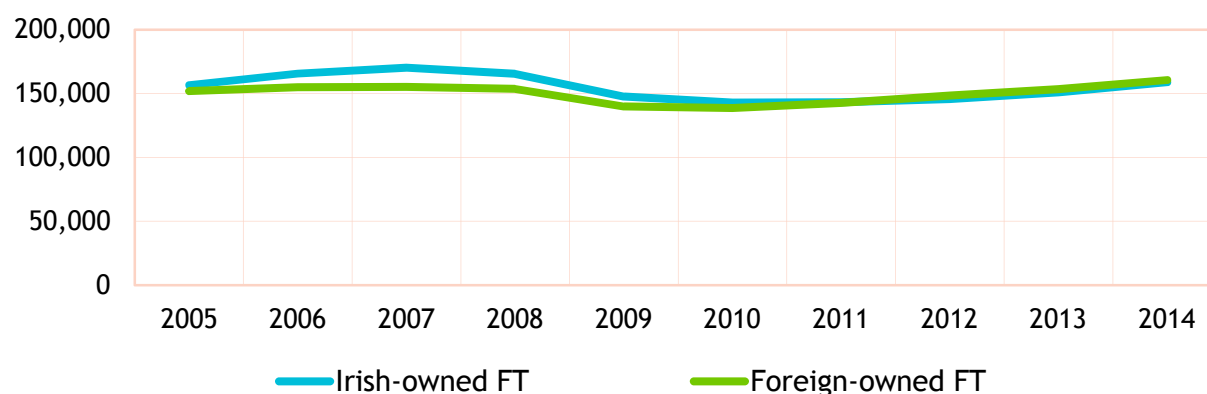
Helena Connellan,
Strategic Policy Division,
Department of Jobs, Enterprise and Innovation,
23 Kildare Street,
Dublin 2.

Tel: 353 (01) 631 2852

Email: helena.connellan@djei.ie

Chapter 1: Employment Trends 2005 -2014

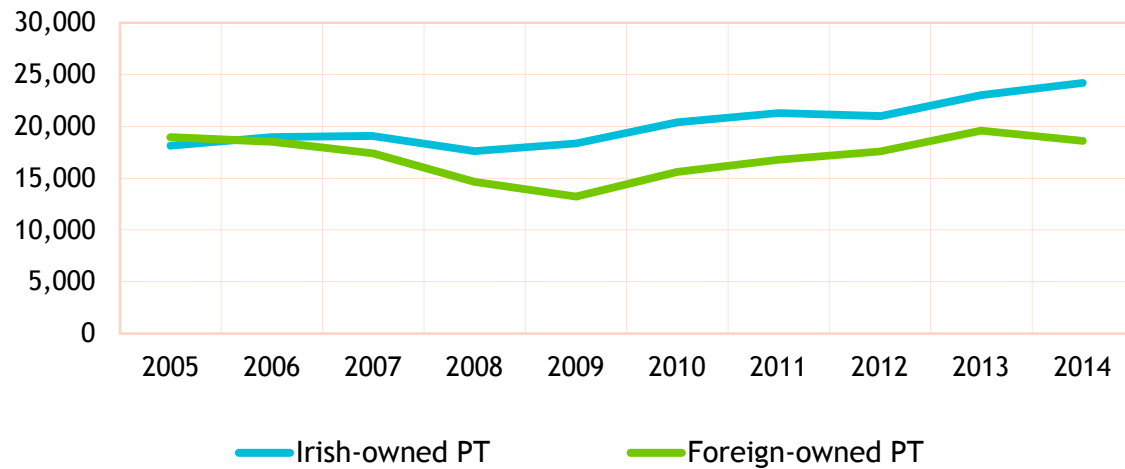
1.1 Trends in Permanent Full-time (FT) Employment in Irish and Foreign-owned Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Irish	156,679	165,684	170,058	165,305	147,698	142,757	142,972	145,606	150,910	158,829
Foreign	151,768	154,888	155,064	153,594	139,787	138,673	142,618	148,326	153,263	160,768
All ownership	308,447	320,572	325,122	318,899	287,485	281,430	285,590	293,932	304,173	319,597

- Total permanent, full-time employment in agency-assisted companies operating in the industrial and services sectors amounted to 319,597 in 2014, an increase of 15,424 jobs (5.1%) on 2013 employment levels.
- Between 2007 and 2010 there was a 13.4 % decrease in full-time employment (43,692 jobs), but employment has increased by 38,167 jobs since 2010. Over the ten year period to 2014, employment has increased by 3.6 %.
- Total full-time employment among Irish-owned companies amounted to 158,829 in 2014, an increase of 5.2% or 7,919 additional jobs over 2013.
- The number of people employed by Irish-owned firms peaked in 2007 with 170,058 in full-time employment. Full-time employment declined by 13.1% (22,360 jobs) between 2007 and 2009 in Irish-owned firms but full time jobs increased by 16,072 between 2010 and 2014. Between 2005 and 2014, full-time employment in Irish-owned firms has increased by 1.4% or 2,150 jobs.
- Among foreign-owned companies, total full-time employment amounted to 160,768 in 2014, an increase of 7,505 jobs (4.9%) over the previous year and the highest employment level recorded over the 10 year series.
- Between 2007 and 2010, foreign-owned companies lost 16,391 jobs but regained 22,095 over the period 2010 to 2014. Between 2005 and 2014, foreign-owned companies saw an increase in employment of 5.9% or 9,000 jobs.

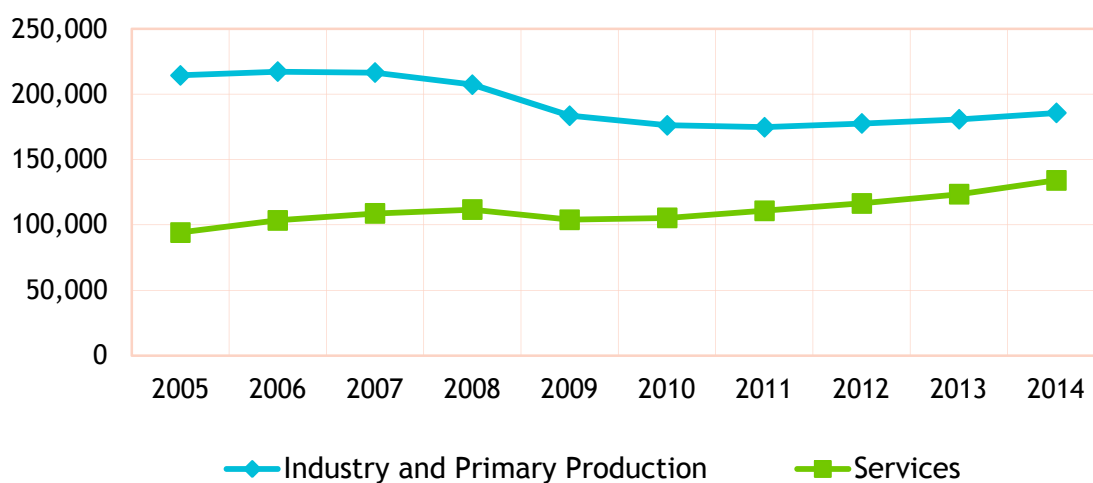
1.2 Trends in Part-time/ Temporary/ Short-term Contract Employment in Irish and Foreign-owned Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Irish	18,141	18,966	19,076	17,624	18,345	20,385	21,291	20,971	23,032	24,202
Foreign	18,959	18,513	17,402	14,662	13,219	15,609	16,773	17,586	19,587	18,616
All ownership	37,100	37,479	36,478	32,286	31,564	35,994	38,064	38,557	42,619	42,818

- In total, there were a further 42,818 jobs of a temporary or part-time nature recorded in agency-assisted companies in 2014 representing an increase of 199 jobs since 2013.
- Part time employment was at its lowest in 2009 for all agency assisted firms and between 2009 and 2013, an additional 11,055 part-time jobs was recorded in agency assisted firms, equating to an average annual increase of 7.8%, this rate of increase has slowed significantly between 2013 and 2014 to 0.5%.
- In Irish owned firms, there has been a significant increase in temporary and part-time employment of 1,170 jobs (5.1%) in 2014. The current part-time employment level of 24,202 is 37% higher than 2008 (which had the lowest recording of part-time employment over the decade). Over the 10 year period part time employment increased by 6,061 jobs, a 33% increase.
- Employment of a temporary or part-time nature among foreign-owned companies amounted to 18,616 in 2014, a decline 971 jobs on the previous year. Between 2009 (the lowest level of part-time employment) and 2013, an additional 6,368 part-time jobs were recorded, equating to an average annual increase of 10.3% over the period. Between 2013 and 2014 there was a decline of 5% in part-time employment. Over the 10 year period part-time employment has declined by 343 jobs, a 1.8% decrease.

1.3 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in All Agency-Assisted Companies, 2005-2014

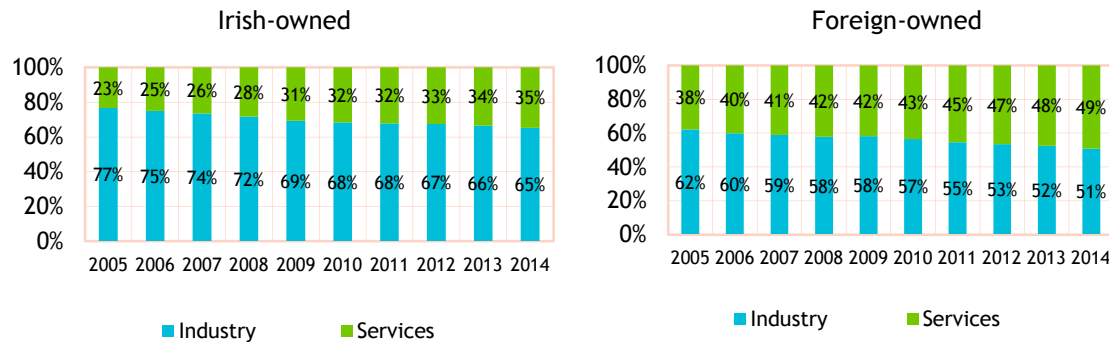


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Industry	214,287	217,129	216,402	207,248	183,528	176,087	174,738	177,494	180,723	185,545
Services	94,160	103,443	108,720	111,651	103,957	105,343	110,852	116,438	123,450	134,052
All sectors	308,447	320,572	325,122	318,899	287,485	281,430	285,590	293,932	304,173	319,597

- Permanent full-time employment in industry² was recorded as 185,545 in 2014. The number employed in industry has increased by 6.2% (10,807 jobs) since 2011, the lowest employment level in the 10 year time series. Employment has fallen by 14.5% from a high of 217,129 in 2006 to its current level. This represents a decrease of 31,584 jobs since 2006. Over the decade full-time employment in the industry sector has decreased by 28,742 jobs (-13.4%).
- The services sector has grown over the period 2005 - 2014, with permanent full-time employment reaching a high of 134,052 jobs in 2014. Employment in services has increased every year since 2005 with the exception of 2009 when the sector shed 7,694 jobs over 2008. Over the decade employment in the services sector increased by 39,892 jobs offsetting the equivalent losses in the industry sector.
- In 2014, employment in the services sector accounted for 42% of total employment compared to 31% in 2005.

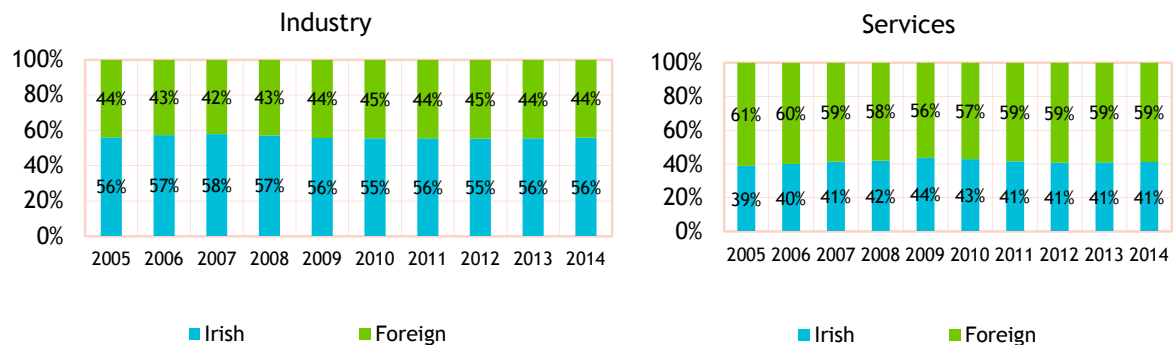
² In the course of this report, "Industry" or "Industrial sectors" includes all Manufacturing sectors, as well as Construction, Utilities and Primary Production, unless otherwise stated.

1.4 Trends in Permanent, Full-time Employment by Industrial and Services Sectors in Irish and Foreign Agency-Assisted Companies, 2005-2014



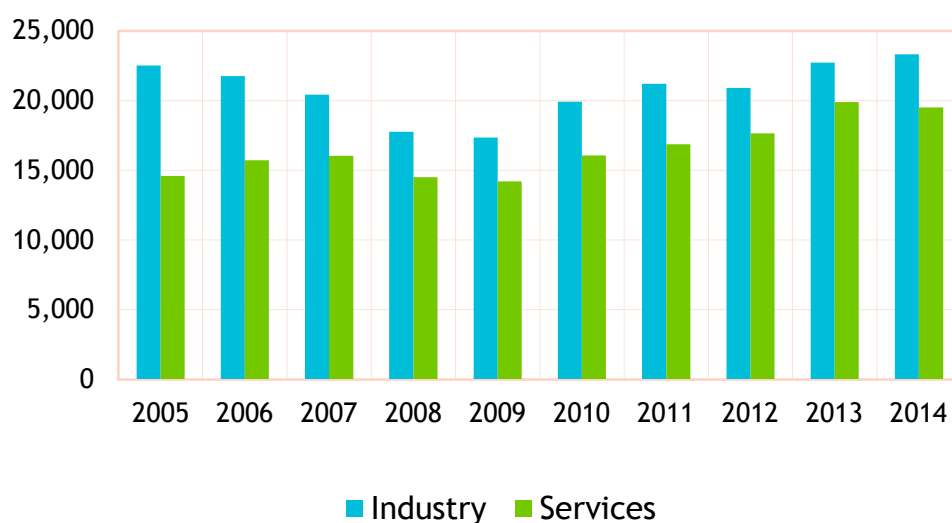
- The majority of both Irish and foreign employment is accounted for by the Industrial sectors.
- It is notable, however, that over the past decade the Services sector has increased its share of total employment in Irish and foreign companies, so that it now accounts for 35% and 49% of total agency employment respectively.

1.5 Trends in Permanent, Full-time Employment in Irish and Foreign Agency-Assisted Companies by Industry and Service Sectors, 2005-2014



- In the Industrial sector, Irish-owned companies accounted for 56% of full-time employment in 2014 without much fluctuation in the share over the decade. Employment in Irish-owned firms in the industry sector declined from 125,061 jobs in 2007 to 96,981 jobs in 2011 and has increased by 7% to 103,747 jobs by 2014. In the foreign-owned sector, employment in industry declined from 94,189 jobs in 2005 to 77,757 jobs in 2011 and then increased by 5.2% by 2014.
- In the services sector foreign-owned firms accounted for 59% of permanent full-time employment in 2014 down from a 61% share in 2004. Irish-owned services firms created 18,501 additional jobs between 2005 and 2014 a 51% increase over the period.
- Foreign-owned services firms created 21,391 extra jobs between 2005 and 2014, a 37.2% increase.
- Overall, services companies created and additional 39,892 jobs between 2005 and 2014, offsetting job losses of 28,742 recorded in the industry sector.

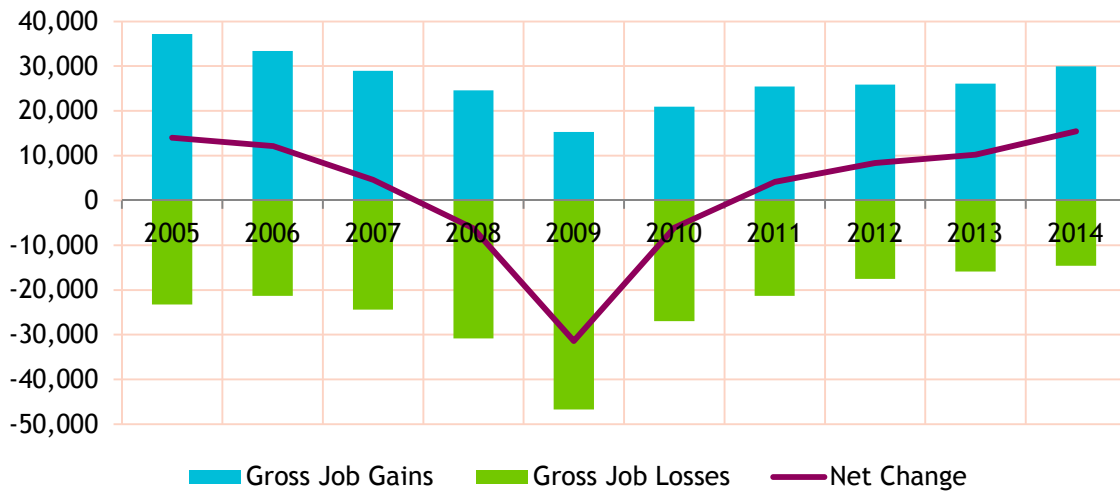
1.6 Trends in Part-time, Temporary and Short-term Contract Employment by Sector in All Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Industry	22,510	21,751	20,434	17,773	17,349	19,922	21,205	20,918	22,728	23,318
Services	14,590	15,728	16,044	14,513	14,215	16,072	16,859	17,639	19,891	19,500
All sectors	37,100	37,479	36,478	32,286	31,564	35,994	38,064	38,557	42,619	42,818

- The above table and accompanying chart document trends in temporary and part-time employment on the basis of Industrial and Services sectors.
- Between 2005 and 2014, total temporary and part-time jobs increased from 37,100 in 2005 to 42,818 in 2014, the highest level recorded over the decade.
- In the Industry sector, part-time employment increased from 22,510 to 23,318 between 2005 and 2014, with the highest level of part-time employment recorded in 2014.
- Temporary and part-time employment within the Services sectors has climbed fairly steadily from 14,590 in 2005 to 19,891 in 2013 - an increase of 5,301 (36.3%). Between 2013 and 2014, temporary and part-time employment in Services declined by 391 jobs (-2%).
- In 2005 the services sector accounted for 39.3% of all part-time employment compared with 45.5% in 2014.

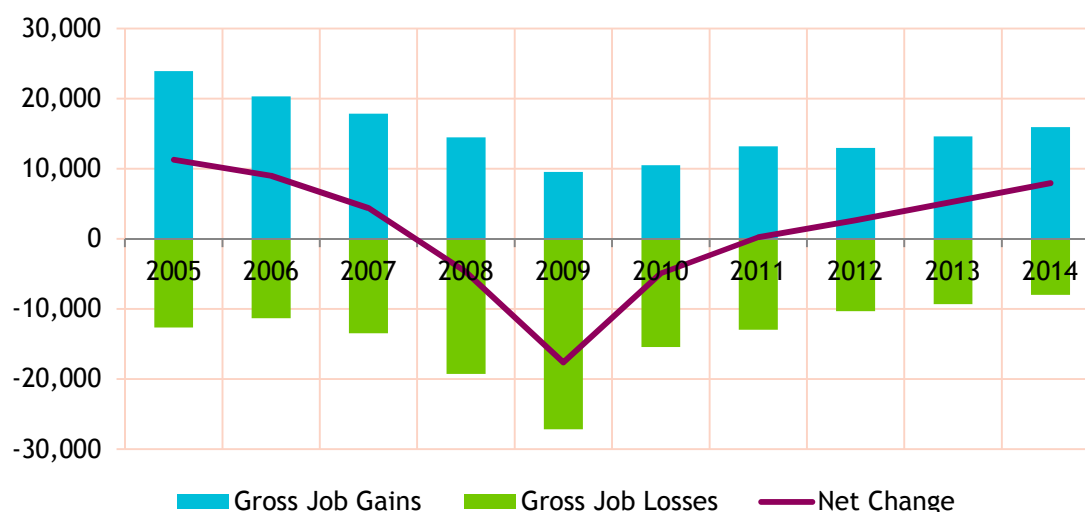
1.7 Job Gains, Losses & Net Change in Permanent Full-time Employment in All Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Gross Job Gains	37,222	33,415	28,971	24,585	15,298	20,936	25,493	25,878	26,127	29,985
Gross Job Losses	-23,221	-21,290	-24,421	-30,808	-46,712	-26,991	-21,333	-17,536	-15,886	-14,561
Net Job Change	14,001	12,125	4,550	-6,223	-31,414	-6,055	4,160	8,342	10,241	15,424

- Figure 1.7 illustrates trends in gross job gains, gross job losses and net job change among all agency-assisted firms during the period 2005 - 2014. 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 2005-2007 agency-assisted companies recorded net job gains, followed by net job losses between 2008 and 2010 with particularly heavy net job losses in 2009 of 31,414 jobs. Since 2011 agency assisted companies have recorded positive net job gains with the highest positive net job change of 15,424 jobs recorded in 2014.
- There has been a 15% increase in gross job gains (3,858 jobs) since 2013, although since 2005 gross job gains have declined by 19%.
- In 2014, total gross job losses at 14,561 were at their lowest level in a decade.

1.8 Job Gains, Losses & Net Change in Permanent Full-time Employment in Irish-owned Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Gross Job Gains	23,916	20,312	17,855	14,486	9,527	10,483	13,180	12,945	14,625	15,929
Gross Job Losses	-12,625	-11,307	-13,481	-19,239	-27,134	-15,424	-12,965	-10,311	-9,321	-8,010
Net Job Change	11,291	9,005	4,374	-4,753	-17,607	-4,941	215	2,634	5,304	7,919

- Figure 1.8 illustrates trends in gross job gains, gross job losses and net job change among Irish-owned firms during the period 2005 to 2014.
- Over the ten year period, most jobs were created by agency assisted companies in 2005 (23,916 jobs). Jobs growth declined between 2006 and 2009 and 2009 recorded the most jobs lost (-27,134) over the 10 year period. From 2010 to 2014 jobs losses lessened considerably from 15,424 jobs to 8,010 jobs respectively, with 2014 recording the lowest job losses in the decade.
- The highest positive net change was recorded in 2005 with 11,291 jobs created and the highest negative net change was recorded in 2009 with 17,607 jobs lost. In 2011, jobs gains of 13,180 exceeded jobs losses of 12,965, resulting in a net change of 215 jobs created indicating a return to jobs growth, the first time since 2007. 2014 was the fourth successive year of positive net growth in employment for Irish-owned firms, recording a net change of 7,919 jobs.

1.9 Job Gains, Losses & Net Change in Permanent Full-time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014

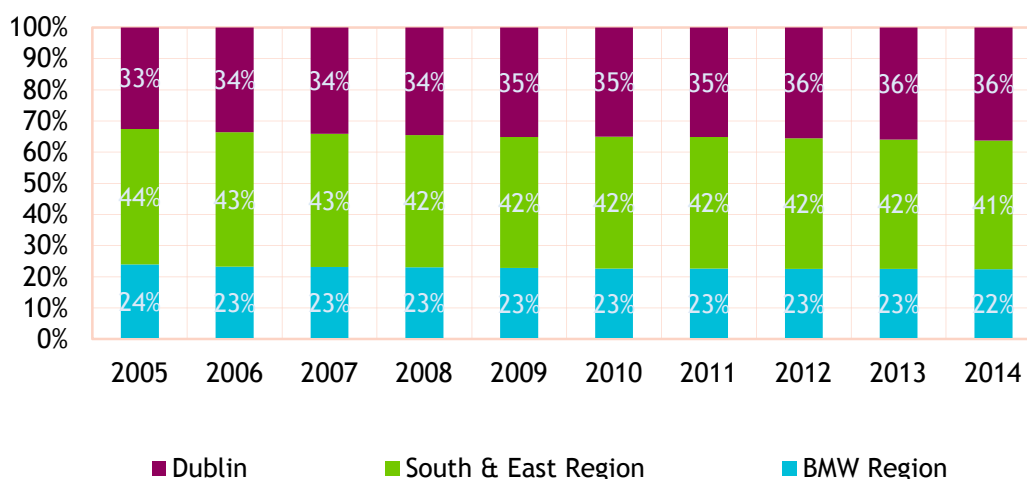


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Gross Job Gains	13,306	13,103	11,116	10,099	5,771	10,453	12,313	12,933	11,502	14,056
Gross Job Losses	-10,596	-9,983	-10,940	-11,569	-19,578	-11,567	-8,368	-7,225	-6,565	-6,551
Net Job Change	2,710	3,120	176	-1,470	-13,807	-1,114	3,945	5,708	4,937	7,505

- Figure 1.9 provides an overview of gross job gains, job losses and net job change in foreign-owned agency-assisted companies between 2005 and 2014.
- Over the ten year period, the best year for job creation for foreign-owned firms was 2014 with 14,056 new jobs created. In 2009, the highest job losses of the decade were recorded with 19,578 jobs lost.
- The highest positive net change was recorded in 2014 with 7,505 jobs created overall and the highest negative net change was recorded in 2009 with 13,807 jobs lost. In 2014, jobs gains of 14,056 exceeded jobs losses of 6,551 resulting in a net change of 7,505 jobs created and indicating a fourth consecutive year of jobs growth.

Chapter 2: Regional Employment Trends 2005-2014

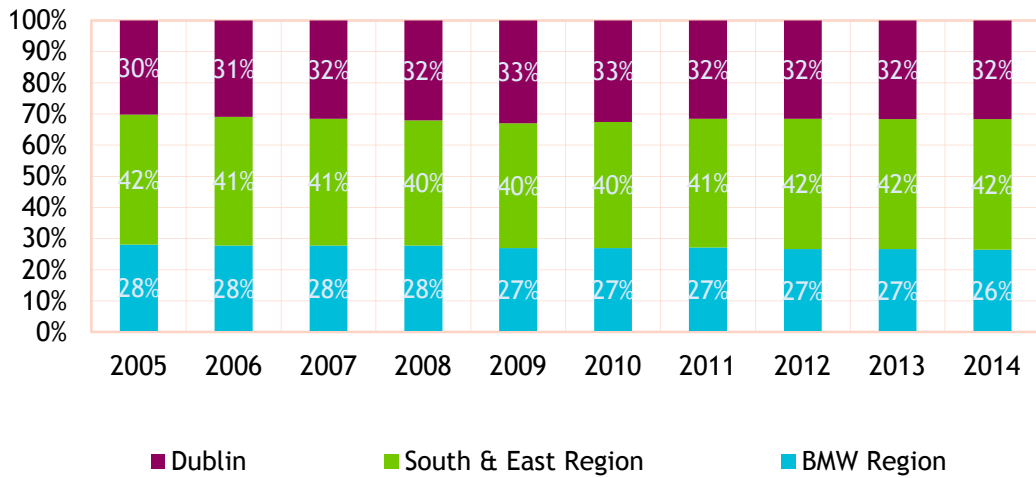
2.1 Permanent Full-Time Employment in All Agency-Assisted Companies by Region, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
BMW	73,873	74,593	75,295	73,517	65,708	63,816	64,810	66,175	68,682	71,635
South & East	134,269	138,372	138,854	135,458	120,676	119,162	120,447	123,318	126,251	132,194
Dublin	100,305	107,607	110,973	109,924	101,101	98,452	100,333	104,439	109,240	115,768
All Regions	308,447	320,572	325,122	318,899	287,485	281,430	285,590	293,932	304,173	319,597

- The Border, Midlands and West (BMW) region saw an increase of 2,953 jobs (4.3%) from 68,682 jobs in 2013 to 71,635 jobs in 2014. The South & East region saw an increase of 5,943 jobs (4.7%) from 126,251 in 2013 to 132,194 jobs in 2014, while Dublin had an increase of 6,528 jobs (6%) from 109,240 jobs in 2013 to 115,768 jobs in 2014.
- In 2005, the BMW region accounted for 23.9% of total agency-assisted employment, employing 73,873 full-time people in 2005. In 2014, the BMW region accounted for 22.4% of employment but employment in the region had decreased by 3% to 71,635. The South and East region accounted for a 43.5% share of total employment in 2005 compared with a 41.4% share in 2014, with employment decreasing by 2,075 (-1.5%) over the period.
- The Dublin region currently accounts for 36.2% of total agency-assisted employment, up from 32.5% in 2005. In absolute terms, employment has increased by 15,463 jobs (15.4%) in Dublin over the period. The highest level of employment over the decade was recorded in the Dublin region in 2014.

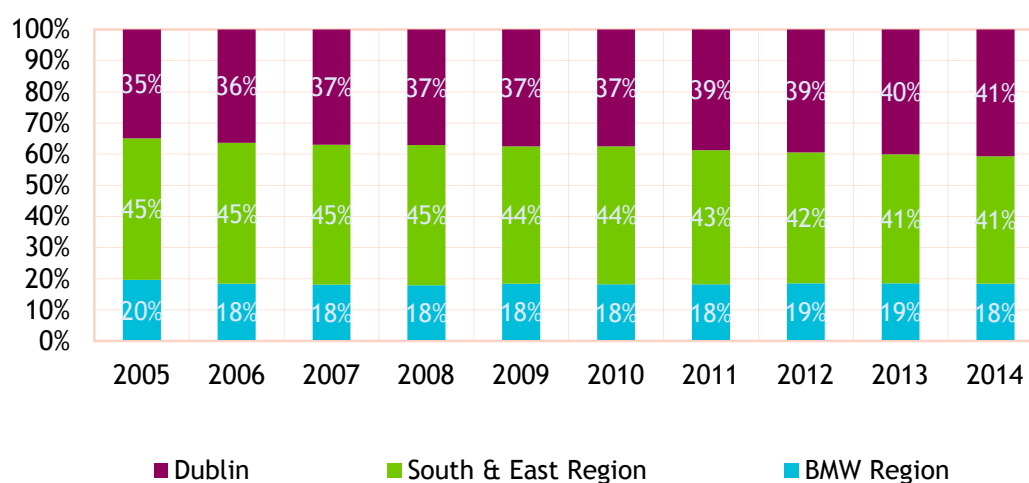
2.2 Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies by Region, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
BMW	44,075	45,978	47,228	45,927	39,893	38,524	38,776	38,733	40,243	42,057
South & East	65,270	68,431	69,154	66,475	59,090	57,712	59,077	60,934	62,883	66,437
Dublin	47,334	51,275	53,676	52,903	48,715	46,521	45,119	45,939	47,784	50,335
All Regions	156,679	165,684	170,058	165,305	147,698	142,757	142,972	145,606	150,910	158,829

- The BMW region gained 1,814 jobs between 2013 and 2014, an increase of 4.5%. The South & East region gained 3,554 jobs an increase of 5.7%, and the Dublin region gained 2,551 jobs, an increase of 5.2% over 2013.
- In 2005, the BMW region accounted for 28.1% of total employment, employing 44,075 full-time staff. In 2014, the BMW region accounted for 26.5% of total employment in the region had decreased by 4.6% to 42,057. The South and East region accounted for a 41.7% share of total employment in 2005 compared with a 41.8% share in 2014, with employment increasing by 1,167 (1.8%) over the period.
- The Dublin region currently accounts for 31.7% of total Irish-owned agency-assisted employment, up from 30.2% in 2005. In absolute terms, employment has increased by 3,001 jobs (6.3%) in Dublin over the period.
- Growth in employment was recorded in all regions between 2013 and 2014

2.3 Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies by Region, 2005-2014

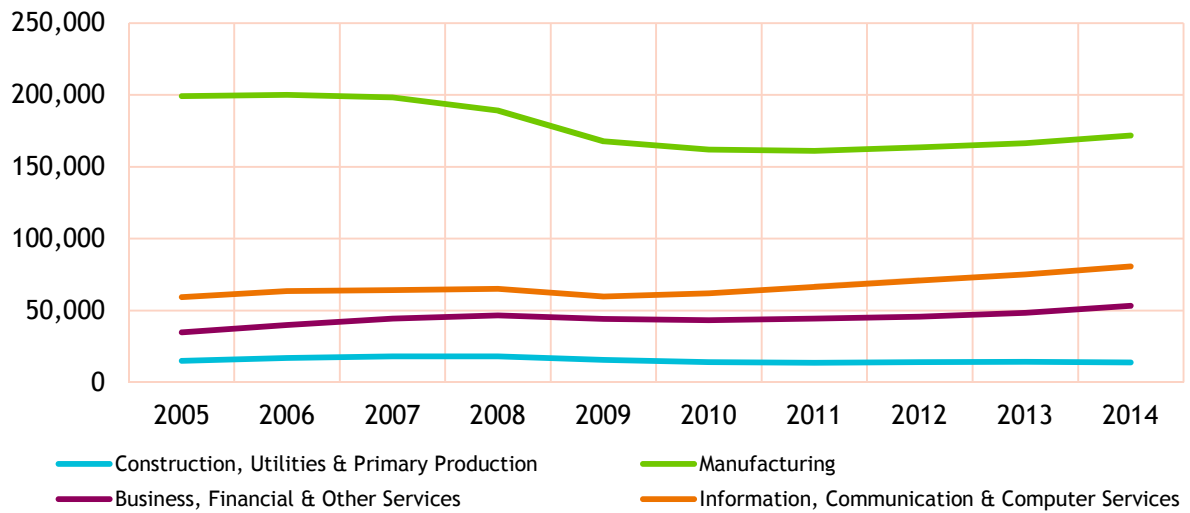


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
BMW	29,798	28,615	28,067	27,590	25,815	25,292	26,034	27,442	28,439	29,578
South & East	68,999	69,941	69,700	68,983	61,586	61,450	61,370	62,384	63,368	65,757
Dublin	52,971	56,332	57,297	57,021	52,386	51,931	55,214	58,500	61,456	65,433
All Regions	151,768	154,888	155,064	153,594	139,787	138,673	142,618	148,326	153,263	160,768

- 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 34.9% in 2005 to 40.7% in 2014. Employment also increased by 12,462 jobs (23.5%) over the 10 years.
- The BMW region has seen its share of foreign-owned employment fall from 19.6% in 2005 to 18.4% in 2014 and recorded losses of 220 jobs (-0.7%) over the period.
- The South and East region saw its share of foreign-owned employment fall from 45.5% in 2005 to 40.9% in 2014 and the region suffered the greatest number of job losses, with a reduction of 3,242 jobs (-4.7%) over the period.
- In 2014, employment in foreign-owned firms increased by 4.9% or 7,505 jobs over 2013. Of these 7,505 jobs, 3,977 (53%) were in the Dublin region, 2,389 (32%) were in the South and East regions and 1,139 (15%) in the BMW region.
- Growth in employment was recorded in all regions between 2013 and 2014

Chapter 3: Sectoral Employment Trends 2005-2014

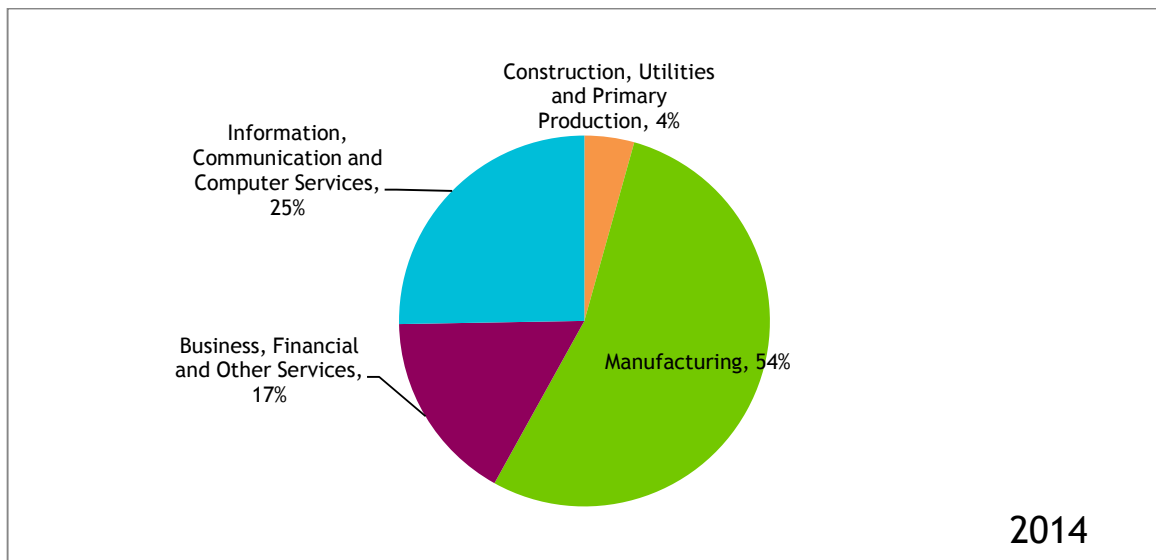
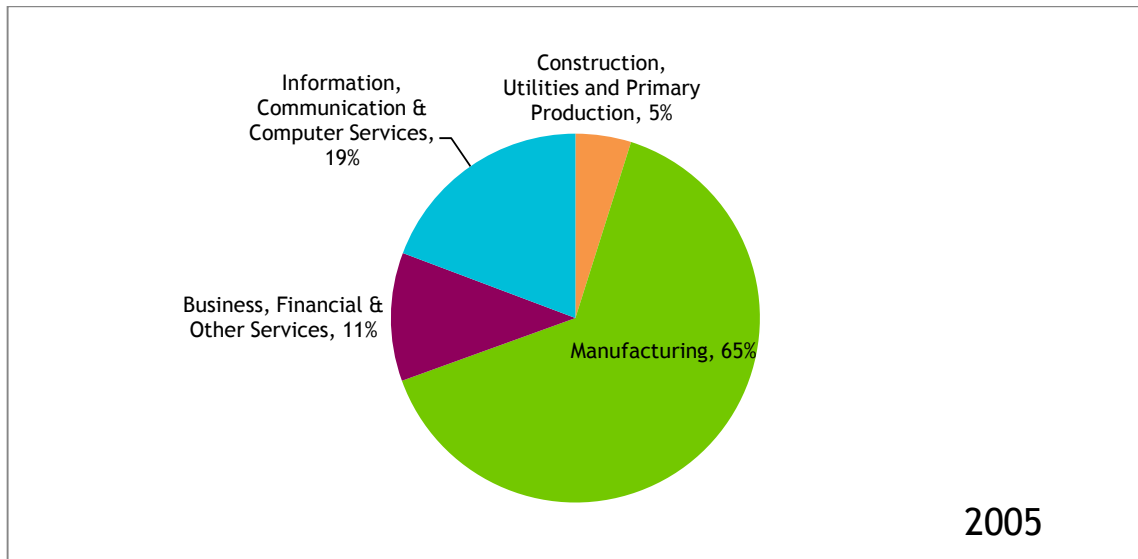
3.1 Sectoral Trends in Permanent Full-Time Employment in All Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction, Utilities & Primary Production	15,048	16,990	18,072	18,113	15,711	14,124	13,657	14,007	14,290	13,871
Manufacturing	199,239	200,139	198,330	189,135	167,817	161,963	161,081	163,487	166,433	171,674
Total Industry	214,287	217,129	216,402	207,248	183,528	176,087	174,738	177,494	180,723	185,545
Business, Financial & Other Services	34,744	39,941	44,459	46,582	44,173	43,356	44,460	45,636	48,393	53,286
Information, Communication & Computer Services	59,416	63,502	64,261	65,069	59,784	61,987	66,392	70,802	75,057	80,766
Total Services	94,160	103,443	108,720	111,651	103,957	105,343	110,852	116,438	123,450	134,052
All Sectors	308,447	320,572	325,122	318,899	287,485	281,430	285,590	293,932	304,173	319,597

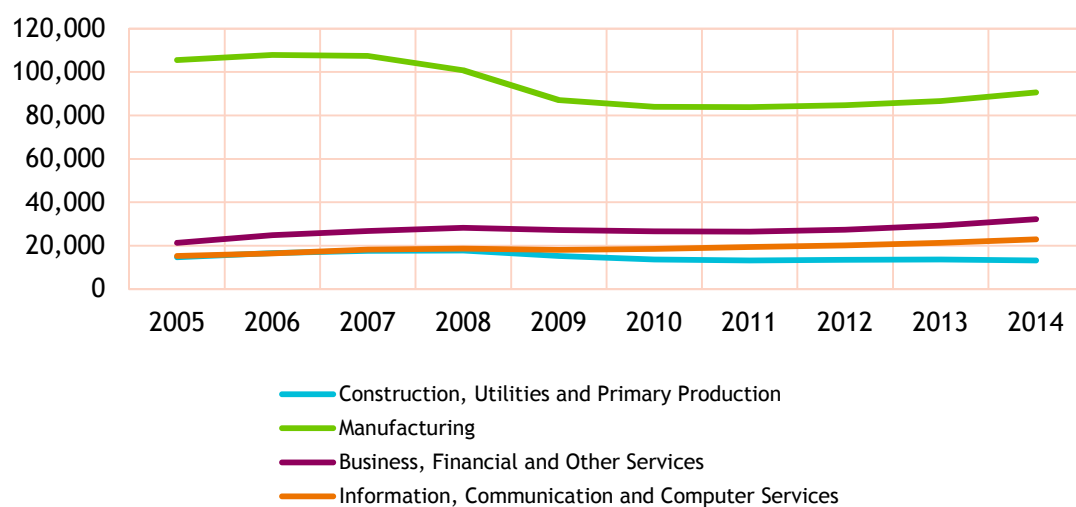
- Figure 3.1 presents a sectoral breakdown of permanent full-time employment across all agency-assisted companies by broad sector. In 2014, employment increased by 15,424 jobs or 5.1% for all sectors over 2013.
- The Information, Communication and Computer Services sector accounted for 37% of this increase creating 5,709 additional jobs. Within this sector, the computer programming activities sector had the largest employment growth since 2013, accounting for an additional 2,737 jobs or 11.5% increase over 2013.
- The Business, Financial and Other Services sector also recorded jobs growth of 10.1% or 4,893 jobs between 2013 and 2014. Since 2005, 18,542 jobs were created in this sector, an increase of 53.4%, of which 9,484 of these jobs were created in the Financial Services sector. The Business Services sector showed the second largest employment growth of all sectors accounting for an additional 2,638 jobs, a 15.5% increase over 2013.
- The manufacturing sector has gained 5,241 jobs since 2013, a rise of 3.1% but the sector has seen a loss of 27,565 jobs or 13.8% since 2005. However, within the manufacturing sector the Medical and Dental Instruments and Supplies sector had employment growth of 20% or 3,884 jobs since 2005.
- The Food sector accounts for 22% of employment (40,447 jobs) in the manufacturing sector in 2014. The Food sector had an increase in employment of 3.7% since 2013 or 1,450 jobs. Since 2005, however, employment in the Food sector declined by 3% with a loss of 1,142 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 saw a decrease over 2013 of 419 jobs. This category of agency-supported internationally trading enterprises has seen employment losses of 1,177 jobs or a decrease of 7.8% since 2005.

3.2 Sectoral Proportions in Permanent Full-Time Employment in All Agency-Assisted Companies, 2005-2014



- As a share of total agency-assisted company employment, manufacturing has fallen from 199,239 in 2005 (65% of total employment) to 171,674 in 2014 (54% of total employment).
- In the business, financial and other services sector employment rose from 34,744 in 2005 to 53,286 in 2014 and has increased its share of total employment from 11% to 17% over the same period.
- The information, communications and computer services sector increased its share from 19% in 2005 to 25% in 2014.
- The construction, utilities and primary production sector saw a small decrease in shares of total employment between 2005 and 2014 of 1%.

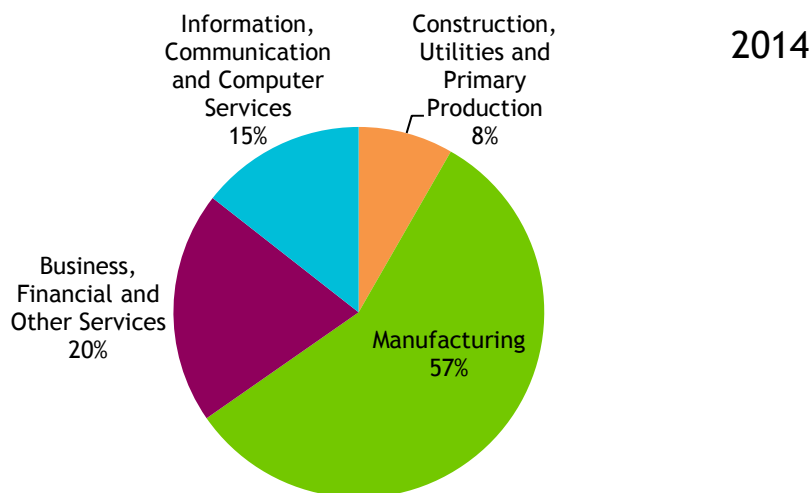
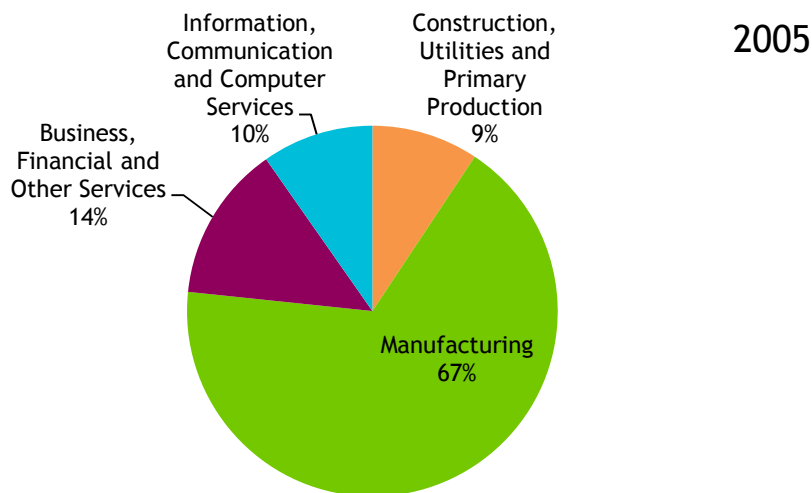
3.3 Sectoral Trends in Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies, 2005-2014



	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Construction, Utilities & Primary Production	14,622	16,570	17,638	17,720	15,280	13,688	13,164	13,432	13,656	13,157
Manufacturing	105,476	107,832	107,423	100,735	87,047	84,022	83,817	84,777	86,699	90,590
Total Industry	120,098	124,402	125,061	118,455	102,327	97,710	96,981	98,209	100,355	103,747
Business, Financial & Other Services	21,359	24,892	26,743	28,206	27,241	26,586	26,530	27,290	29,224	32,156
Information, Communication & Computer Services	15,222	16,390	18,254	18,644	18,130	18,461	19,461	20,107	21,331	22,926
Total Services	36,581	41,282	44,997	46,850	45,371	45,047	45,991	47,397	50,555	55,082
All Sectors	156,679	165,684	170,058	165,305	147,698	142,757	142,972	145,606	150,910	158,829

- Figure 3.3 presents a sectoral breakdown of permanent full-time employment across Irish-owned companies by broad sector. In 2014, employment increased by 7,919 jobs or 5.2% for all sectors over 2013.
- Manufacturing jobs increased by 3,891 since 2013, up 4.5% on 2013 and 45% of these additional jobs were created in the Food sector. Since 2005, however, the manufacturing sector has seen a loss of 14,886 jobs.
- The Business, Financial and Other Services sector saw growth of 10% in employment, or 2,932 jobs since 2013. Over the 10 year period this sector has seen employment growth of 50.6% or 10,797 jobs, with the Business Services sector accounting for 7,373 (or 65%) of those jobs.
- The Information, Communication and Computer Services sector created 1,595 additional jobs since 2013, up 7.5% on 2013. Employment in the Construction, Utilities and Primary Production sector has decreased by 499 jobs (-3.7%) in 2014.

3.4 Sectoral Proportions in Permanent Full-Time Employment in Irish-owned Agency-Assisted Companies, 2005-2014



- As a share of total Irish-owned company employment, manufacturing has fallen from 105,476 in 2005 (67% of total employment) to 90,590 in 2014 (57% of total employment).
- The Business, Financial and Other Services sector has seen its share increase from 14% to 20% between 2005 and 2014. Employment in this sector has increased from 21,359 in 2005 to 32,156 in 2014.
- The Information, Communications and Computer Services sector has also increased their share of total employment from 10% in 2005 to 14% in 2014 with numbers employed increasing from 15,222 in 2005 to 22,926 in 2014.
- The Construction, Utilities and Primary Production sectors saw a small decrease of 1% in its share of total employment between 2005 and 2014.

3.5 Sectoral Analysis of Permanent Full-Time Employment in Industry and Services in Irish-owned Agency-Assisted Companies, 2014

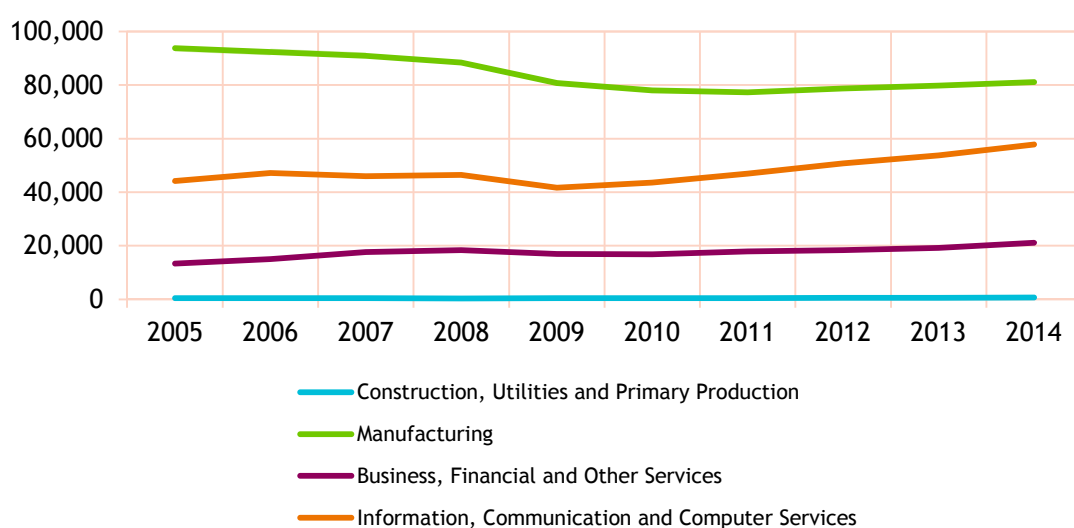
Irish Owned	2014 Full time jobs	2014 Full time gains	2014 Full time losses	2014 Full time change	2013-2014 Full Time % Change
Manufacturing	100,092	8,802	5,409	3,393	3.5%
Basic and Fabricated Metal Products	8,721	905	276	629	7.8%
Chemicals	3,550	211	345	-134	-3.6%
Clothing, Footwear and Leather	1,141	35	93	-58	-4.8%
Computer, Electronic and Optical Equipment	4,711	588	188	400	9.3%
Drink and Tobacco	1,781	38	146	-108	-5.7%
Electrical Equipment	3,239	437	143	294	10.0%
Food	35,858	3,514	1,763	1,751	5.1%
Machinery and Equipment	6,809	579	227	352	5.5%
Medical and dental instruments and supplies	1,527	185	41	144	10.4%
Miscellaneous Manufacturing	3,709	344	226	118	3.3%
Non-Metallic Minerals	4,828	381	280	101	2.1%
Paper and Printing	4,591	278	229	49	1.1%
Rubber and Plastics	3,739	256	139	117	3.2%
Textiles	1,057	88	39	49	4.9%
Transport Equipment	1,471	85	40	45	3.2%

Irish Owned	2014 Full time jobs	2014 Full time gains	2014 Full time losses	2014 Full time change	2013-2014 Full Time % Change
Wood and Wood Products	3,858	240	98	142	3.8%
Construction, Energy, Water and Waste	9,502	638	1,136	-498	-5.0%
Primary Production	3,655	164	165	-1	0.0%
Agriculture, Fishing and Forestry	2,244	86	108	-22	-1.0%
Mining & Quarrying	1,411	78	57	21	1.5%
Services	55,082	6,963	2,436	4,527	9.0%
Business Services	18,670	2,974	542	2,432	15.0%
Financial Services	4,829	483	90	393	8.9%
Computer consultancy activities	10,776	1,172	572	600	5.9%
Computer facilities management activities	1,702	222	84	138	8.8%
Computer programming activities	945	179	104	75	8.6%
Other Information and Communication	6,877	854	450	404	6.2%
Other information technology and computer service activities	2,626	499	121	378	16.8%
Other Services	8,657	580	473	107	1.3%
Total	158,829	15,929	8,010	7,919	5.2%

- Table 3.5 provides a sectoral analysis of permanent, full-time employment for Irish-owned firms in 2014 along with job gains and losses over the corresponding 2013 figures. It also provides net percentage change in employment between 2013 and 2014.
- From table 3.5 we can see that the majority (63%) of Irish-owned employment continues to be found in the manufacturing sectors.
- This sector has seen the loss of 5,409 jobs in 2014, with job gains of 8,802 resulting in a net gain of 3,393 jobs. The sectors that suffered the highest negative net change in manufacturing were the construction, energy, water and waste sector (-498 jobs) and chemicals (-134 jobs).
- The sectors with the highest positive net change were food (1,751 jobs), basic & fabricated metal products (629 jobs) and machinery and equipment (352 jobs). The medical and dental instruments and supplies sector had a net increase of 10.4% in employment equating to 144 additional jobs and the highest proportional net change in 2014.

- The Services sectors account for 37% of Irish agency-assisted employment. This sector created 6,963 jobs in 2014 and recorded losses of 2,436 resulting in a net gain of 4,527 jobs (9%).
- The sectors with the highest positive net change in absolute terms were business services (2,432 jobs) and computer consultancy activities and (600 jobs). All the services sectors showed a positive net change in 2014 over 2013.

3.6 Sectoral Trends in Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014

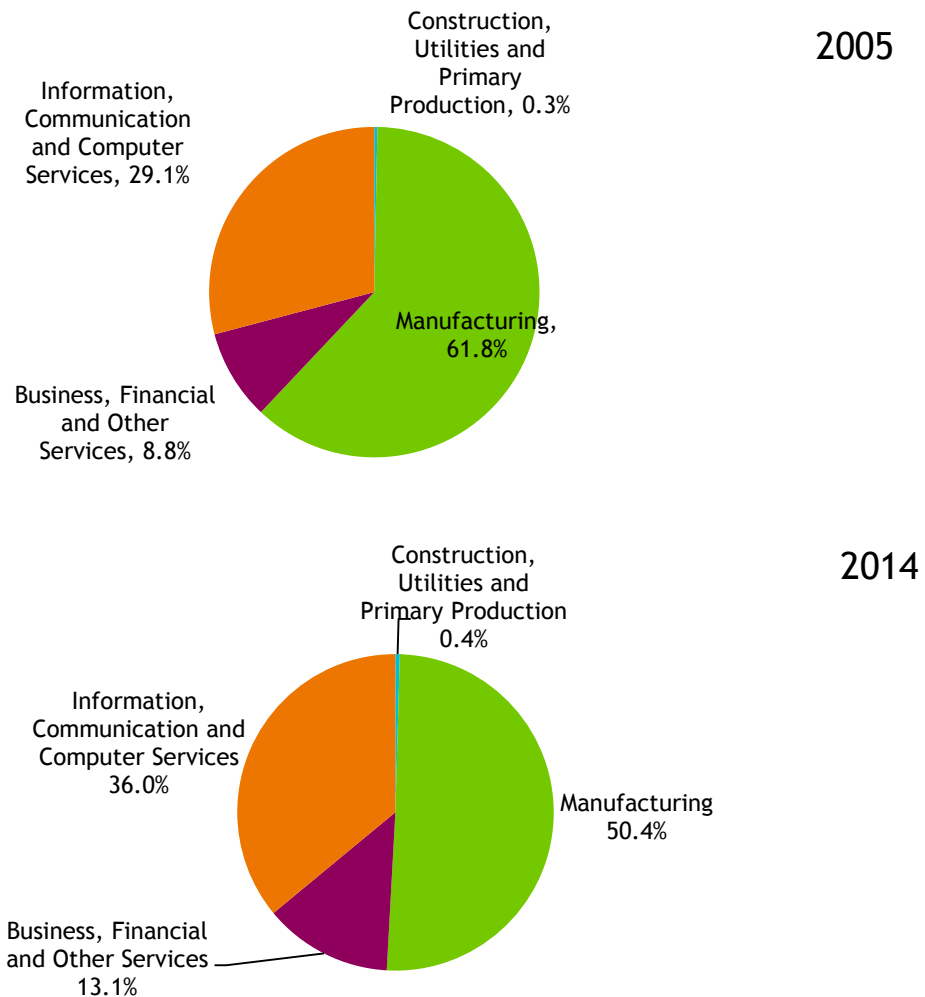


	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Total Manufacturing	94,189	92,727	91,341	88,793	81,201	78,377	77,757	79,285	80,368	81,798
Business, Financial & Other Services	13,385	15,049	17,716	18,376	16,932	16,770	17,930	18,346	19,169	21,130
Information, Communication & Computer Services	44,194	47,112	46,007	46,425	41,654	43,526	46,931	50,695	53,726	57,840
Total Services	57,579	62,161	63,723	64,801	58,586	60,296	64,861	69,041	72,895	78,970
All Sectors	151,768	154,888	155,064	153,594	139,787	138,673	142,618	148,326	153,263	160,768

- 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 2005 to 2014. Foreign companies in this sector have shed 12,391 jobs in this period, a reduction of 13.2%. Despite the reduction, this sector remains the largest foreign-owned employer accounting for 61.8% of employment in 2014.
- The Services sectors have seen more buoyant employment numbers over the period 2005 to 2014. In similar fashion to Irish-owned companies, employment in the Business, Financial and Other Services sector saw a substantial increase going from 13,385 employed in 2005 to 21,130 in 2014. Information, Communication and Computer Services also had a good year in 2014 with an increase of 7.7% over 2013.
- Foreign-owned companies employ a negligible number of employees in Construction, Utilities and Primary Production.

3.7 Sectoral Proportions in Permanent Full-Time Employment in Foreign-owned Agency-Assisted Companies, 2005-2014



- Figure 3.7 depicts the proportion of employment in foreign owned client companies for each sector in 2005 and in 2014.

- Notable are the reduced share of Manufacturing jobs moving from 61.8% in 2005 to 50.4% in 2014 and the increases in the Services sectors.
- The Information, Communication and Computer Services sectors now represent 36% of total employment compared with 29.1% in 2005. Similarly, the Business, Financial and Other Services sectors have increased their share to 13.1% in 2014 from 8.8% in 2005.
- Construction, Utilities and Primary Production employment shares have negligible proportions.

3.8 Sectoral Analysis of Permanent Full-Time Employment in Industry and Services in Foreign-owned Agency-Assisted Companies, 2014

Foreign Owned	2014 Full time jobs	2014 Full time gains	2014 Full time losses	2014 Full time change	2013-2014 Full Time % Change
Manufacturing	81,457	4,848	3,473	1,375	1.7%
Basic and Fabricated Metal Products	1,906	86	68	18	1.0%
Chemicals	19,208	850	754	96	0.5%
Clothing, Footwear and Leather	37	0	6	-6	-14.0%
Computer, Electronic and Optical Equipment	16,274	1,124	342	782	5.0%
Drink and Tobacco	2,358	15	144	-129	-5.2%
Electrical Equipment	2,085	193	315	-122	-5.5%
Food	4,589	155	456	-301	-6.2%
Machinery and Equipment	3,959	201	133	68	1.7%
Medical and dental instruments and supplies	21,650	1,682	378	1,304	6.4%
Miscellaneous Manufacturing	1,374	45	82	-37	-2.6%
Non-Metallic Minerals	684	54	118	-64	-8.6%
Paper and Printing	852	81	70	11	1.3%
Rubber and Plastics	2,954	133	123	10	0.3%
Textiles	76	0	2	-2	-2.6%
Transport Equipment	2,685	196	481	-285	-9.6%
Wood and Wood Products	393	7	0	7	1.8%

Foreign Owned	2014 Full time jobs	2014 Full time gains	2014 Full time losses	2014 Full time change	2013-2014 Full Time % Change
Construction, Energy, Water and Waste	373	26	1	25	7.2%
Primary Production	341	55	0	55	19.2%
Agriculture, Fishing and Forestry	341	55	0	55	19.2%
Services	78,970	9,153	3,078	6,075	8.3%
Business Services	1,003	238	32	206	25.8%
Financial Services	19,104	1,924	641	1,283	7.2%
Computer consultancy activities	16,755	1,468	742	726	4.5%
Computer facilities management activities	7,915	471	789	-318	-3.9%
Computer programming activities	25,513	3,111	449	2,662	11.6%
Other Information and Communication	719	251	66	185	34.6%
Other information technology and computer service activities	6,938	1,215	356	859	14.1%
Other Services	1,023	475	3	472	85.7%
Total	160,768	14,056	6,551	7,505	4.9%

- 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 2014.
- Within Manufacturing, employment grew overall by 1,375 jobs to 81,457 jobs, an increase of 1.7% over 2013. Job losses in manufacturing of 3,473 were outnumbered by job gains of 4,848.
- Net increases in employment in the Manufacturing sectors were driven by the medical and dental instruments and supplies sector (1,304 jobs; 6.4%) and the computer, electronic and optical equipment sector (782 jobs; 5%). The sectors with the largest net losses were food (-301 jobs; -6.2%) and transport equipment (-285 jobs; -9.6%).
- Within the Services sector, employment grew overall by 6,075 jobs over 2013 (8.3%) to 78,970 jobs.
- Key drivers of this overall increase included an 11.6% (2,662 jobs) net growth in the number employed in the computer programming activities sector.
- The services sector with the largest number of employees is the Computer Programming activities sector. This sector employed 25,513 people in 2014, followed by financial services with 19,104 employees.

