

Regional Labour Markets Bulletin 2015

September 2015

Regional Labour Markets Bulletin 2015

A Report Prepared by the Skills and Labour Market
Research Unit in SOLAS

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Foreword

The Regional Labour Markets Bulletin 2015 has been produced by the Skills and Labour Market Research Unit in SOLAS on behalf of the Expert Group on Future Skills Needs. It is the fourth in a series of reports aimed at providing an analysis of the key labour market indicators for each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West, and West.

It has been recognised that there are geographical disparities in Ireland in terms of skills supply and demand. The availability of timely and comprehensive regional labour market intelligence, coupled with relevant information regarding the enterprise structure of a region, is increasingly becoming of paramount importance for decision making in the areas of education and training at regional level. It is a key input to the newly developed Regional Skills Fora and an important input into the Regional Action Plan for Jobs.



The report highlights the differences across regions with regard to their enterprise landscape, namely sectoral composition, pervasiveness of high value added activities such as knowledge intensive services and high tech manufacturing, and aligned to this, the differences in the profile of regional labour markets, including the share of relatively highly skilled occupations in employment. In addition, there are differences regarding the degree of engagement with the labour market and the education system, and consequently, in labour force participation, employment, and unemployment rates across the regions.

The report also shows that there are a number of similarities across the regions, including the relative size of broad public sector, the type of vacancies advertised through the public employment services, the composition of unemployment, and the skill profile of job seekers. Although varying in the extent, the presence of young people who are disengaged from both labour market and education and training is common to all regions.

This report presents a comprehensive profile of Ireland's regions and provides information of relevance for policy devising and implementation in the areas of education and training provision, career guidance, as well as relevant labour market activation initiatives and associated services for job seekers at a regional level. It offers relevant indicators that can be used to assess the labour market situation of specific groups, such as young people. The report could also be utilised for assessing the pace of recovery in different regions by monitoring a number of relevant indicators on a regular basis.

A handwritten signature in black ink, appearing to read "Una Halligan".

Una Halligan
Chairperson, Expert Group on Future Skills Needs

Executive Summary

The *Regional Labour Markets Bulletin 2015* provides an overview of the Irish labour market at regional level with the objective of supporting the empirically driven decision making process in the areas of education and training provision, career guidance, and labour market policies, including labour market activation initiatives.

When interpreting the data, it should be borne in mind that while the report aims to profile the regional labour markets, sourcing of skills for the Irish labour market occurs at a State level with considerable mobility of labour across the country. In other words, the supply of skills emerging from education and training in a region is not necessarily confined to that region. Equally, the job opportunities arising in a region are not limited or consigned to the local labour supply.

The report's overarching section presents a summary of relevant labour market, enterprise, and education & training indicators and statistics for each region, facilitating a comparison across the regions and between the regions and the State. The subsequent sections of the report are comprehensive profiles of each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.

The report highlights some differences across regions such as the contribution of knowledge intensive services, industry (especially its relevant segments such as high tech manufacturing), as well as other sectors including agriculture, to regional economic output and, *inter alia*, the influence of sectoral composition on regional labour markets. Furthermore, and aligned to the above, there are differences in the profile of regional labour markets, namely the composition of employment, such as the share of relatively highly skilled occupations in employment. Finally, there remain differences in terms of some labour market indicators, namely participation rates, unemployment rates, and rates of employment across the regions; it is informative to observe the changes regarding these indicators across the regions over time.

There are also many similarities across the regions, such as the relative size of the broad public sector (in terms of employment), the composition of unemployment with regard to age, educational attainment, previous sector of employment and occupation, the profile of PES job seekers, and the composition of PES vacancies. Another similarity is a rather uniform composition of persons on the Live Register across the regions in terms of age and gender, as well as the changes year-on-year, with all regions reporting a sizeable reduction in the numbers signing on. Finally, there appears to be a sizeable target group for a range of labour market and education initiatives in each region, as evidenced by the presence of young people who are disengaged from the labour market, that is to say, who are neither employed nor in education or training (this group is referred to as 'NEET'). However, while the presence of young persons classified as NEET is common to all regions, their rate, expressed as a percentage of relevant age group, varies between regions.

Selected key points

- Labour force and participation: in quarter 4 2014,
 - Dublin had the largest labour force of approximately 643,000, accounting for 30% of the State's total labour force; the Midland region had the smallest - approximately 131,000 persons were participating in the labour market, which amounted to 6% of the total domestic labour force
 - Dublin had the highest participation rate of 62.8%, just above the participation rate of 62.6% for the Mid-East
 - the Border region had the lowest participation rate of just 54%, while the Mid-West region had the second lowest rate of 57.7%; the South-West, South-East, Midland, and West regions all had the participation rate below that for the State.
- Employment: in quarter 4 2014,
 - Dublin and the Mid-East region had the highest employment rates at 66.4% and 65.1% respectively, whereas the Border region had the lowest rate, at 57.4%; all other regions had the employment rate below that for the State, albeit the West region only marginally so
 - Dublin had the highest share of employment in knowledge intensive services (namely market, high tech and financial services, broadly coinciding with financial, professional and ICT broad sectors of economic activity), with one quarter of its employment in these services; thus Dublin had the highest share of employment in the ICT sector, and subsequently, with over 44,000 employed in this sector, it accounted for more than a half of total ICT employment in the State
 - Dublin, together with the Mid-East region, also had a sizeable share of its employment in transportation; conversely, it had the lowest share of employment in industry, construction and agriculture
 - despite having relatively the lowest share of its employment in industry (only 7%), Dublin nevertheless accounted for one quarter of high technology manufacturing employment nationally; furthermore, at 41%, it had the highest share of its manufacturing employment in high tech manufacturing activities; in contrast, the corresponding figure for the Border and Midland regions was 11%
 - Dublin had the highest share of persons employed in relatively high skilled occupations - 22% were professionals; Dublin, together with the Mid-East, had relatively the highest share of associate professionals (14%), as well as administrative occupations (13%); in contrast, it had the lowest share of its employment in skilled trades and operative occupations
 - over the period quarter 4 2013 to quarter 4 2014, the Mid-East region reported the strongest rate of employment growth of 5% year-on-year, as well as relatively the strongest decline in unemployment.

- Inter-regional employment and commuting: in quarter 4 2014,
 - the prevalence of inter-regional commuting was highest in the Mid-East region, where 40% of workers who resided in the region were employed in other regions, the overwhelming majority in Dublin
 - a sizeable share (almost a fifth) of workers residing in the Midland region were also commuting to other regions; in contrast, those residing in the South-West and Dublin were least likely to be employed in other regions.

- Unemployment: in quarter 4 2014,
 - the highest unemployment rates were observed in the Midland and in South-East regions, at 13% and 12% respectively; the lowest rates were observed in the Mid-East region (8.5%) and in Dublin (8.6%)
 - the largest share of unemployed persons had previously been employed in either skilled trades or elementary occupations across all regions
 - of all regions, Dublin had the largest share of unemployed professionals and associate professionals; consequently, and reflecting the size of its labour market, it accounted for 35% of all unemployed professionals and for 40% of unemployed associate professionals in the State
 - there were a considerable number of unemployed people with no previous employment experience (21% of the total); aligned with this, almost a third had no previous occupation
 - the Border region had the highest share of unemployed with at most lower secondary education (37%), whereas the Midland had the lowest (24%); Dublin had the highest share of unemployed with third level degrees (21%), while the Midland had the highest share with upper secondary education (at 35%)
 - youth unemployment rates were at particularly elevated levels in the Midland and South-East regions.

- Education:
 - in 2014, the total output from the national education and training system, expressed as awards, amounted to almost 95,000 awards (NFQ 1-10) for the State; the largest numbers of these were in the business & law (22%), health & welfare (21%), and arts & humanities (13%) fields; Dublin accounted for 37% of all national awards (NFQ 1-10); with regard to the field of learning, Dublin accounted for 40% of all awards for science & maths, 36% of ICT awards, and 35% of engineering & construction awards in the State
 - there were approximately 28,500 major awards made by QQI to FET learners gaining QQI awards across levels 1-6 on the NFQ framework in the State; almost a third of these were for health & welfare, almost a fifth were for business & law, about one-in-eight were for arts & humanities and for general learning, and about one-in-twelve were for engineering & construction and for agriculture; Dublin accounted for 28% of all FET QQI (major)

awards; the South-West accounted for 15%, and the Border and South-East regions accounted for 14% each; within the regions, the Border had the highest relative share of awards in business & law (26%), while the Mid-East had the highest share of awards in health & welfare, with 40% of its FET awards in this field

- the number of higher education awards (NFQ 6-10) made to learners at IOTs and universities in 2014 amounted to approximately 66,500; the highest share of these (almost a quarter) were for business & law, a further 17% were for health, 14% for arts & humanities, and 10% for engineering & construction; Dublin accounted for 40% of all higher education awards nationally; within the regions, the Midland had the highest share of business & law awards (almost a third of all higher education awards were in this field), the Border had relatively the highest share of its awards in engineering & construction; the South-East had the lowest share of its awards in the field of science & maths (only 3%)
 - early school leaving - early school leavers (ESL) or early leavers from education and training: continued improvements in retention and graduation rates at secondary level notwithstanding, early school leaving remains an issue of relevance; in quarter 4 2014, the ESL rate was above the national average rate (of almost 7%) in the Border, Midland, and South-East regions; Dublin, despite having a relatively low ESL rate, still accounted for almost one quarter of all early school leavers in the State
 - disengagement from education and from the labour market - a sizeable section of young people in each region were neither in employment nor in education or training (NEET); in quarter 4 2014, the Midland region had the highest NEET rate (for those younger than 25) of 19%, followed by the Border and South-East regions, at 17% each, while the lowest rates were observed in the Mid-West (9%) and Dublin (10%) regions; the NEET rates for those aged 24-35 were even higher, exceeding 20% in all regions with the exception of Dublin.
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- Active enterprises in the private business economy: in 2012,
 - the wholesale and retail sector accounted for the largest share of active enterprises in all regions except in Dublin, where professional activities accounted for the largest share (23%, twice the national average share); consequently, the Dublin region had a higher share of active enterprises in professional, scientific and technical activities than any other region
 - nationally, 18% of enterprises were in construction, while professional activities accounted for 16%; the information and communication (ICT) and manufacturing sectors each accounted for 6% of active enterprises
 - small and medium sized enterprises (SMEs) accounted for 99.7% of the total enterprise population in the State and for 68% of total persons engaged; while large enterprises (employing 250 persons or more) accounted for only 0.3%, SMEs accounted for 32% of all persons engaged; in each region, the vast majority of enterprises were micro enterprises (employing fewer than 10 persons); these enterprises accounted for at least 90% of all active enterprises in all regions except Dublin, where their share was 89%.

- Medium to large businesses: in 2014,
 - medium to large enterprises were most numerous in industry, wholesale & retail, and accommodation & food activities, accounting for 18%, 16% and 11% of the total number of medium to large enterprises respectively
 - consistent with the size of its economy, Dublin had the highest number of medium to large enterprises in each sector, with the exception of agriculture, where it was matched by the Border and Mid-East regions; its dominance was particularly discernible in the financial sector, with Dublin accounting for more than four fifths of all medium to large enterprises operating in this sector in the State; similarly, Dublin accounted for seven-in-ten of all medium to large enterprises in the ICT sector, and for three-in-five in professional services and in transport
 - while Dublin had the largest number of large to medium companies in other sectors, its dominance was relatively less pronounced; thus it accounted for about a third of medium to large companies operating in industry, construction, accommodation & food, and wholesale & retail
 - the Midland region had the lowest number of medium to large enterprises in all sectors.

- Economic output - Gross Value Added in 2012
 - Dublin accounted for 42% of the State's total output in 2012; it also had the highest output per person, while the Midland region had the lowest
 - apart from Dublin, the South-West region was the only other region with the output (measured by indices of GVA per person) above the average value for the State; these two regions combined accounted for three fifths of the total output of the State in 2012
 - in relation to 2011, Dublin was the only region to report an increase in the output (in relative terms, measured by indices of GVA per person); the Mid-West, South-West and West remained static, while the other regions reported a decline.

- Industrial output value: in 2012,
 - the total value of industrial output in Ireland was €100.7 billion, of which more than a third was produced in the South-West region, and more than a fifth in Dublin; in contrast, the Midland and Border regions accounted for 3% and 5% respectively
 - €58.2 billion was produced in the modern sector; the South-West region accounted for just over a third, while Dublin accounted for 27% of the total output produced in the modern sector; the Midland and Border regions accounted for 1% and 2% of the total output produced in the modern sector respectively
 - the Midland and Border regions had relatively the lowest shares of output produced in the modern segment of industry, at 26% and 21% respectively, while effectively there was an inverse picture in Dublin, where the modern sector accounted for three quarters of the industrial output produced in 2012.

- Public Employment Service (PES)/DSP Jobs Ireland vacancies: in 2014,
 - the distributions of vacancies by occupational group varied little across regions, with the largest number of vacancies being advertised for elementary occupations (e.g. catering assistants), caring & personal services occupations (care workers and home carers), skilled trades (chefs and cooks), sales occupations (sales assistants, collector salesperson), and associate professional occupations (business sales executives), while there were comparatively few for managers, professionals, and administrative/secretarial occupations; this could be due to an occupational bias in advertising, as many employers advertise vacancies for higher skilled positions through channels other than DSP Jobs Ireland
 - the highest number of PES/DSP Jobs Ireland vacancies was advertised for Dublin, with this region accounting for over a third of almost 70,000 vacancies advertised nationally in 2014.

- Live Register:
 - in May 2015, there were approximately 345,600 persons on the Live Register, a year-on-year decrease of approximately 43,100 (11%); the numbers on the Live Register declined in all regions over the period, and the rate of decline accelerated when compared with the period May 2013-May 2014 in all regions
 - the most pronounced decline, in relative terms, was observed in the Mid-West region (by 12.2%), followed by Dublin (12%); at 9.3%, the South-East reported the smallest decline in relative terms.

- Job seekers registered with the Public Employment Service (PES), in May 2015:
 - reflective of the size of its labour market, Dublin accounted for one quarter of all job seekers registered with the PES in the State
 - there are similarities regarding the occupational distributions of job seekers across regions, with those who were previously employed in elementary occupations accounting for the highest share of job seekers in each region - this share ranged from 20% in the Mid-East region and in Dublin, to 25% in the South-East region; the share of those previously employed in skilled trades was the second highest in all regions, ranging from 16% in Dublin to 20% in the South-West region
 - Dublin had the highest shares of job seekers previously employed as professionals, associate professionals and managers; consistent with this, it had the lowest share of job seekers in elementary, operative, skilled trades, and caring & leisure occupations.

Introduction

The Regional Labour Markets Bulletin 2015 provides an overview of the labour market at regional level with the objective of supporting the decision making process in the areas of labour market policies, career guidance and education, including higher education and further education and training provision. The report provides the key indicators relating to the supply and demand for skills in each of the eight NUTS 3 regions (NUTS-Nomenclature of Territorial Units). The NUTS 3 regions are: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.¹

NUTS 3 regions in Ireland

Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West
Cavan	Dublin City	Kildare	Laois	Clare	Carlow	Cork City	Galway City
Donegal	Dun Laoghaire	Meath	Longford	Limerick City	Kilkenny	Cork County	Galway County
Leitrim	Fingal	Wicklow	Offaly	Limerick County	South Tipperary	Kerry	Mayo
Louth	South Dublin		Westmeath	North Tipperary	Waterford City		Roscommon
Monaghan					Waterford County		
Sligo					Wexford		

The regional analysis draws on data from a variety of sources compiled and maintained by the SLMRU (SOLAS), namely: CSO Quarterly National Household Survey (QNHS), Datalreland (company database), Department of Social Protection (DSP) Jobs Ireland Vacancies, DSP Job Seekers (Client Services System), Higher Education Authority (HEA), QQI Ireland, IDA, newspapers, press releases, as well as CSO StatBank (CSO Main Data Dissemination Service, providing access to CSO Census of Industrial Production, CSO Annual Service Inquiry, CSO Business Demography, CSO Live Register, CSO National Accounts, and other CSO data).

When interpreting the data the following should be borne in mind:

- The report aims to profile the regional labour markets; however, sourcing of skills for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country, which is illustrated in the report, with the prevalence of inter-regional commuting in some regions; in other words, the supply emerging from education and training in a region is not confined to that region, just as the job opportunities in a region are not restricted to the local labour supply

¹The regional analysis is based on the NUTS 3 regional classification, which is also used by the Central Statistics Office (CSO) when reporting data nationally and internationally (e.g. Eurostat). The NUTS3 regions correspond to the eight Regional Authorities established under the Local Government Act, 1991 (Regional Authorities) (Establishment) Order, 1993, which came into operation on 1 January 1994. The NUTS 3 classification differs from the Education and Training Boards (ETB) regions. For instance, in the NUTS 3 classification, Mayo is classified in the West region; in the ETB classification, Mayo is grouped with Sligo and Leitrim, which the NUTS 3 classifies as the Border counties. In the NUTS 3 classification, Meath is classified in the Mid-East region; in the ETB grouping, it is grouped with Louth, which NUTS 3 classifies as a Border county.

- The report uses the most recent data available at the time of analysis; however, the time periods associated with the latest available data vary across data sources (e.g. the latest employment data at occupational level is for the period October to December (quarter 4) 2014, vacancy data presented covers the whole year (2014); higher education (HE) and further education & training (FET) awards data is for 2014; Datareland enterprise data refers to 2014; Business Demography and Census of Industrial Production refer to 2012, while the most recent data for County Incomes and Regional GDP are also for 2012; the most recent data for Live Register are for (May) 2015; other CSO data available via CSO StatBank refer to various years; finally, announcements of job creation in the media are characterised by a certain lead-time, and while some may relate to the current period, it may take a number of years for all the jobs announced to materialise
- The units of measurement, concepts and definitions used differ across data sources (e.g. the CSO in the QNHS uses the ILO definition of employment and unemployment,² and the main unit of analysis is an individual, Business Demography counts both active enterprises and persons engaged in the population of active enterprises, with a similar approach adopted in the Census of Industrial Production; Datareland also captures the numbers of persons engaged and the numbers of active enterprises; in County Incomes and Regional GDP, both counties and NUTS 3 regions are the main units of analysis
- In many instances, the data at regional level from the QNHS are too small for statistical inferences and may be subject to statistical errors (e.g. observations less than 1,000 cannot be reported for any statistics based on the QNHS); in addition, changes over time in some cases may be variations caused by sampling, rather than the underlying or observable trend
- Occupational classifications differ across data sources and some accuracy is lost when mapping one classification to another (e.g. DSP uses MANCO, while the CSO uses the Standard Occupational Classification (SOC) 2010)
- In relation to vacancy data, only vacancies advertised through the Public Employment Service (DSP Jobs Ireland) are presented; it should be borne in mind that the PES vacancy data is a subset of all vacancies advertised nationally and therefore underrepresents the total vacancy market in the State, and by extension, in regions
- In each region, recent examples are given of companies which announced, through the media (e.g. newspapers, online media, etc.), the creation of jobs in the short-medium term; this is

² Based on International Labour Office (ILO) definition, the employed population consists of those persons who during the reference week did any work for pay or profit for at least one hour, or were not working, but had jobs from which they were temporarily absent. Unemployed persons comprise persons aged 15 to 74 who: are without work during the reference week, are available to start work within the next two weeks, and have been actively seeking work in the past four weeks, or had already found a job to start within the next three months.

not an exhaustive list and is for illustrative purposes only; much of the job creation amongst micro or small companies may not be announced in the media; while job creation expected to arise from foreign direct investment supported by the Industrial Development Agency (IDA) is informing the assessment, not all projects in the pipeline could be identified or depicted due to confidentiality reasons

- The education and training overview presented in the report, while relatively comprehensive, nevertheless still only covers a sub-set of all provision, namely
 - with regard to FET, data and statistics reported are confined to those gaining (major) QQI awards; hence activities that do not lead directly to certification (e.g. adult literacy) are not included; equally, FET awards by other award bodies (e.g. City & Guilds) are not included
 - HEA data from 2014 is the latest available (June 2015) and refers to the HEA-aided sector; while the data and statistics presented in the report comprise the overwhelming majority of HE awards in 2014, it is estimated that there were approximately 5,000 higher education awards made by the Quality and Qualifications Ireland (QQI) in 2014 to learners outside the HEA-aided sector (e.g. private providers)
- The term ‘industry’ is broader than ‘manufacturing’; the industrial sector includes manufacturing (making up the largest share), extraction/mining, and utilities (e.g. power supply)
- Knowledge intensive services (KIS) - Eurostat defines the following sectors as knowledge-intensive services, where aggregations are made at NACE 2 digit level:
 - knowledge-intensive market services (water and air transport, legal and accounting, management consultancy, architectural and engineering, advertising and market research, other scientific and technical activities, employment and security related activities - corresponding to NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80)
 - knowledge-intensive financial services (financial and insurance services- corresponding to NACE Rev. 2 codes 64, 65, 66)
 - high tech knowledge-intensive services (ICT excluding publishing, research and development activities - corresponding to NACE Rev. 2 codes 59 - 63, 72), and
 - other knowledge-intensive services (PAD, education, health and social work, arts, entertainment and recreation, publishing and veterinary activities - corresponding to NACE Rev. 2 codes 58, 75, 84 - 93)
 - the focus in the report is on knowledge-intensive high tech, market and financial services, since other knowledge intensive services include the public sector activities, which are reported separately
- While cognisant of the fact that a share of healthcare and education is provided by the private sector, in the report, these two sectors (together with Public Administration and Defence) are

referred to as ‘the public sector’, given the significant share of State provision and funding of services in these areas

- The information and communication sector (ICT) includes computer programming, telecommunications, information services, publishing and broadcasting; it does not include ICT equipment manufacturing or wholesale activities in computers, computer peripheral equipment and software
- Regional Accounts are produced annually by CSO and provide estimates of Gross Value Added (GVA) for the two overall NUTS 2 regions and the eight Regional Authorities (equivalent to the NUTS 3 regions); Gross Value Added (GVA) is a measure of the value added generated by the production of goods and services.³ Total GVA is equivalent to GDP; it includes the profits (arising in the State) of companies operating in a region, a considerable amount of which may accrue to non-residents. In addition, as illustrated in the report, the Mid-East region and the Dublin region are affected by a substantial proportion of their workforce living in one region and commuting to work in another. In practice, this increases the GVA of the Dublin region, being the region to which most of the commuting to work takes place, as well as being the region that is the location of a relatively large number of businesses.⁴

Report Structure

The report begins with an overarching chapter where all relevant labour market data, statistics, and associated indicators are presented for all regions, thereby providing a brief profile for each region but also allowing regional comparisons to be made. This chapter is followed by eight chapters, each focusing on one of Ireland’s eight administrative (NUTS 3) regions, where more detailed region-specific statistics are presented.

³ Gross Value Added (GVA) at basic prices is a measure of the value added generated by the production of goods and services. In the valuation at basic prices output is priced at the value received by the producer less product taxes payable (e.g. VAT, excise duties, etc.) plus subsidies receivable on products. Total GVA, when valued at market prices, is equivalent to GDP at market prices.

⁴ CSO, Statistical Yearbook of Ireland 2012; CSO, County Incomes and Regional GDP 2012, March 2015.

1. Overview of the Regions

This section presents relevant labour market statistics and indicators for each region and for the State, allowing a comparison between regions and the national average in terms of the supply and demand for skills, as well as regarding relevant labour market indicators, such as labour market participation, employment, and unemployment rates.

Labour market indicators

Table 1 presents the selected labour market and demographic statistics by region for the fourth quarter of 2014. Dublin had the largest population at almost 1.3 million persons, accounting for 28% of the total national population, whereas the Midland region had just below 291,000 and accounted for only 6%. Dublin, accounting for only 1% of the area of the State in km², had the highest population density of 1,432 persons per km², while the West region had the lowest, at 32 persons per km²; Border had the second lowest density, at 41 persons per km².

Consistent with the above, Dublin had the largest labour force of approximately 643,000 persons, accounting for 30% of the total labour force in the State, compared to 131,000 in the Midland, 170,000 in Mid-West, and 202,000 in West regions, accounting for 6%, 8, and 9% of the total respectively.

Table 1. Demographic and labour market statistics by region, Q4 2014

Region	Area km ²	Share (%) of area of State	POP 000s	P/km ²	POP 15-64 000s	LF 000s	E 000s	UE 000s	E rate	UE rate	P rate
Border	12,200	18%	498.4	41	310.3	206.4	185.8	20.6	57.4%	10.0%	54%
Dublin	900	1%	1,288.6	1,432	868.7	642.9	587.5	55.5	66.4%	8.6%	62.8%
Mid-East	6,100	9%	552.9	91	357.5	259.9	237.9	22.0	65.1%	8.5%	62.6%
Midland	6,500	9%	290.8	45	186.1	130.9	113.7	17.2	58.7%	13.1%	59.1%
Mid-West	8,200	12%	378.4	46	242.1	170.1	152.8	17.3	61.4%	10.2%	57.7%
South-East	9,400	14%	508.1	54	326.3	232.3	204.5	27.7	60.8%	11.9%	58.7%
South-West	12,200	18%	671.6	55	438.1	308.3	275.6	32.7	60.5%	10.6%	58.2%
West	13,800	20%	434.9	32	275.8	201.7	181.1	20.6	62.4%	10.2%	59.5%
Ireland	69,400	100%	4,623.7	67	3,004.7	2,152.5	1,938.9	213.6	62.6%	9.9%	59.8%

Source: Analysis by SOLAS (SLMRU) based on CSO data; www.iro.ie

The labour force participation rate⁵ varied noticeably between the regions - the Border region had the lowest (54%), while Dublin had the highest (62.8%), closely followed by the Mid-East region, which had the second highest rate (62.6%). All other regions had the participation rate below the average rate for the State of 59.8%, although the West (at 59.5%) only marginally so.

⁵The participation rate is the number of persons in the labour force expressed as a percentage of the total population aged 15 or over.

With 587,500 persons in employment, Dublin accounted for 30% of the total employment in the State, while the Midland, with 113,700 persons, accounted for 6%. Dublin had the highest employment rate (66.4%), followed by the Mid-East (65.1%); the Border had the lowest (57.4%), followed by the Midland region (58.7%).

Employment expanded particularly strongly in the Mid-East, by 5% year-on-year, translating into 12,000 persons more at work in the fourth quarter of 2014 when compared with the fourth quarter of 2013. The South-East region also expanded relatively strongly, by 4%, with approximately 7,500 persons more in employment, Dublin added 15,400, while employment in the Midland and Mid-West regions grew by 2% and 1% respectively over the same period; employment remained unchanged in the Border, while it contracted in the South-West and West regions, with approximately 5,000 persons fewer at work in each, year-on-year.

When compared with the situation a year previously, all regions with the exception of the South-West reduced the number of unemployed, although the Midland region only marginally so. The Mid-East region reduced the number of unemployed by over 10,000 or by about a third; as result, it had the lowest rate of unemployment (8.5%), which was only marginally lower than the rate in Dublin (8.6%). In contrast, the Midland region had the highest rate of unemployment (13.1%); however, all labour market indicators in the region have moved in the right direction - the numbers in labour force and in employment increased, the number of unemployed decreased (albeit only slightly), with the commensurate decrease in the rate of unemployment and a marginal increase in participation rate. The other two regions where all above labour market indicators progressed in the desired direction were the Mid-West and Dublin regions. The opposite was the case in the South-West region, where both labour force and employment contracted, coupled with increases in unemployment and in the rate of unemployment, and a decrease in the participation rate.

The Border region reported a sizeable reduction in unemployment, by approximately 8,500, and, consistent with this, a reduction in the rate of unemployment of 3.5 percentages points, year-on-year. However, given that there was no increase in the number of persons in employment, the above reduction in unemployment could be attributed to people leaving the labour force (given that it contracted by almost the same magnitude, resulting in the participation rate declining) or leaving the region (given that the total population, and in particular, the population aged 15-64, declined by approximately 9,000 persons). Apart from the Border, the labour force contracted in the West, South-West, and, albeit only slightly, in South-East regions.

Sectoral employment

Table 2 presents the sectoral distribution of employment for each region in quarter 4 2014. Approximately one quarter of those at work in each region were employed in the public sector (defined in a broad sense, to include public administration and defence, education, and health and social work combined). The share of employment in the public sector was the highest in the Midland region, at 28%, while the Border, Dublin, and West regions all had the share above the national average. Industry was the largest sector of employment in most regions, the exceptions being the Mid-East and Dublin regions, where wholesale & retail was the largest.

Dublin had the highest share of its employment in knowledge intensive services (comprising knowledge intensive market, high tech, and financial services - broadly coinciding with high value added sectors - information and communication, professional, and financial services) which amounted to a quarter of all in employment in the region.⁶ Thus about one-in-ten of all persons in employment in the Dublin region were working in financial services, and the region accounted for 55% of all employed in this sector in the State. The Mid-East region was the only other region where the share of employment in financial services was above the national average. Dublin accounted for just over a half of all employed in the ICT sector in the State, while the Mid-East was the only other region to have the share employed in this sector above the national average. Aligned with this, apart from Dublin, the Mid-East was the only other region where the share of employment in knowledge intensive services exceeded the national average. In contrast, the Midland and Border had relatively the lowest shares of employment in knowledge intensive services.

Agriculture was relatively large in the West, Border, South-East, and Midland regions; apart from Dublin, the Mid-East was the only region to have the share of agricultural employment below the national average. The share of employment in construction was the highest in the Midland and the lowest in Dublin. The share of employment in accommodation and food services ranged from 5% in the Midland to 8% in the South-West region.

Table 2. Sectoral employment by region, (000s) Q4 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Agriculture	17.7	2.2	9.1	10.1	10.5	18.5	19.8	17.9	105.9
Industry	27.1	42.8	32.3	16.4	25.2	31.1	39.6	30.0	244.5
Construction	9.8	25.3	17.8	9.5	9.6	15.3	18.8	10.5	116.7
Wholesale and retail	25.1	81.3	34.0	16.3	22.5	30.9	40.9	25.7	276.7
Transportation	7.9	33.6	13.6	5.7	6.0	7.2	11.7	4.4	90.2
Accommodation and food	14.4	43.3	14.8	5.7	9.4	15.1	22.1	12.6	137.5
Information and communication	3.5	44.2	9.1	2.1	4.5	3.6	11.4	5.1	83.5
Financial	5.6	55.6	12.9	3.1	4.5	6.7	8.1	5.3	101.8
Professional activities	8.4	47.0	15.3	5.3	9.0	10.2	14.2	7.8	117.1
Admin. and support	4.9	22.5	8.0	3.3	4.7	6.6	10.9	4.8	65.6
PAD	8.7	32.4	11.6	7.6	6.9	8.4	11.4	7.8	94.7
Education	14.5	45.5	18.2	8.5	13.0	16.9	21.2	16.2	154.0
Health and social work	27.2	77.1	27.7	15.5	19.1	24.6	33.8	23.9	248.9
Other NACE activities	10.8	34.6	13.5	4.6	7.9	9.4	11.8	9.1	101.6
Total	185.8	587.5	237.9	113.7	152.8	204.5	275.6	181.1	1,938.9

Source: Analysis by SOLAS (SLMRU) based on CSO data

⁶ Knowledge-intensive market services (water & air transport, legal & accounting, management consultancy, architectural & engineering, advertising & market research, other scientific & technical activities, employment and security related activities - corresponding to NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80); High-tech knowledge-intensive services (ICT excluding publishing, R&D - corresponding to NACE Rev. 2 codes 59 - 63, 72); Knowledge-intensive financial services (financial & insurance - corresponding to NACE Rev. 2 codes 64, 65, 66). (Source: Eurostat)

Table 3 shows the number of active enterprises by economic sector for each region in 2012. There were approximately 185,500 active enterprises in the private business economy in Ireland.⁷ Nationally, the highest number of active enterprises was in wholesale and retail (23%), construction (18%) and professional services (16%). The information and communication (ICT) sector accounted for 6% of all active enterprises in the State. The Dublin region accounted for almost one third of all active enterprises. It accounted for a half of all ICT enterprises active in the State, for two thirds of enterprises in financial and insurance activities, and for two fifths in professional, scientific and technical activities. Within the Dublin region, almost a quarter of all active enterprises were engaged in professional, scientific and technical activities, the highest share of all regions.

Table 3. Number of active enterprises by business economy sectors and region⁸, 2012

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Not known	Ireland
Mining & quarrying	22	**	**	24	16	13	19	39	**	353
Manufacturing	1,456	2,468	1,385	775	1,064	1,459	1,883	1,065	445	11,999
Electricity, gas	15	**	**	6	15	**	12	14	**	326
Water; sewerage, waste	131	174	93	52	67	65	144	87	**	874
Construction	3,933	6,975	4,330	2,117	2,806	3,838	5,448	3,758	675	33,879
Wholesale and retail	4,931	11,066	4,550	2,442	3,469	4,689	6,279	3,942	843	42,210
Transportation	1,248	2,583	1,277	575	814	1,127	1,461	770	83	9,937
Accommodation & food	2,113	3,464	1,436	920	1,611	1,927	2,870	1,887	51	16,279
ICT	466	5,855	1,147	263	561	519	1,054	675	224	10,764
Financial &insurance	206	3,712	336	113	276	218	419	231	99	5,658
Real estate activities	956	4,440	1,333	464	752	949	1,580	1,064	99	11,637
Professional activities	1,845	13,088	3,215	1,032	2,010	2,116	4,650	1,934	436	30,325
Administration & support	914	4,022	1,220	492	1,097	962	1,487	891	204	11,289
Business economy (B to N, 642) *	18,332	57,989	20,395	9,302	14,584	17,975	27,386	16,381	3,187	185,530
Education	814	1,912	827	293	713	812	1,117	894	**	7,586
Business economy & education	19,146	59,901	21,222	9,595	15,297	18,787	28,503	17,275	3,187	193,116

Source: CSO, Business Demography SLMRU (SOLAS) analysis of CSO data

** Indicates that the data has been suppressed by the CSO to protect the confidentiality of individual enterprises.

⁷ The CSO Business Demography provides estimates of the population of active enterprises - all enterprises that were active at some point during the reference year 2012 (and earlier years) in the private business economy in Ireland. The private business economy covers the NACE Rev. 2 sectors B-N (excluding activities of holding companies). The NACE Rev. 2 sectors are: B - Mining and Quarrying, C - Manufacturing, D - Electricity, Gas, Steam and Air Conditioning Supply, E - Water Supply; Sewerage, Waste management etc. , F - Construction, G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles, H - Transportation and Storage, I - Accommodation and Food Service Activities, J - Information and Communication, K - Financial and Insurance Activities (excludes NACE code 64.20 activities of holding companies), L - Real Estate Activities, M - Professional, Scientific and Technical Activities, N - Administrative and Support Service Activities. Recently, the coverage of business demography statistics has been extended to the education sector and the health sector. Consequently, only figures for the private business economy (NACE Rev. 2 sectors B-N) should be compared with earlier years / time series. The population figures for the years 2006 to 2009 were revised due to an increase in coverage of very small enterprises in the CSO's Business Register; the revisions have the effect of adding 3.7% to the total number of enterprises and 0.5% to the total number of persons engaged for the year 2009.

⁸ The geographical breakdown is based on the address at which an enterprise is registered for Revenue purposes. Where an enterprise has local units in several counties, but one head office where all employment is registered, all its employees are counted against the county where the head office is located; the apparent discrepancy in totals is due to a 'region unknown' category, while the regional total would not correspond to the sum of enterprises by county due to some cells being too small to report due to confidentiality reasons.

Table 4 presents the share of active enterprises in the private business economy, by size, for each region in 2012. Small and medium sized enterprises (SMEs) accounted for 99.7% of the total active enterprise population and for 68% of total persons engaged; despite accounting for only a small proportion of the total population of enterprises, large enterprises (with 250 or more persons engaged) accounted for just under one third of all persons engaged. In each region, the vast majority of enterprises were micro enterprises (with fewer than 10 persons engaged) - over 90% in all regions except Dublin (89%). For all other enterprise sizes, Dublin had above the national average share. The Mid-East and Midland regions had the highest share of micro enterprises.

Table 4. Active enterprises by enterprise size and region, 2012

Enterprise size (by number of persons engaged)	Border	Dublin	Mid- East	Midland	Mid- West	South- East	South- West	West	Ireland
Under 10	90.4%	89.1%	92.5%	92.0%	91.3%	91.1%	91.2%	91.2%	90.7%
10 – 19	2.1%	5.2%	4.3%	**	5.0%	3.8%	4.9%	4.4%	5.01%
20 – 49	2.7%	3.4%	2.2%	2.1%	2.5%	2.5%	2.5%	2.5%	2.7%
50 – 249	1.1%	1.8%	0.8%	0.9%	1.1%	0.9%	1.2%	1.3%	1.3%
SME (< 250) share	96.4%	99.5%	99.9%	95.1%	99.8%	98.3%	99.8%	99.4%	99.7%
250 and over	0.1%	0.5%	0.1%	**	0.2%	0.2%	0.2%	0.1%	0.3%

Source: CSO, Business Demography, NACE Rev 2 B-N

** Denotes small numbers that have been excluded to protect the confidentiality of individual enterprises.

Table 5 shows the data on companies employing 50 persons or more by region and sector for 2014. Consistent with the size of its economy, Dublin had the highest number of medium to large enterprises in each sector, with the exception of agriculture. However, Dublin's dominance was particularly discernible in the financial sector, with this region accounting for more than four fifths of all medium to large enterprises operating in the State. Similarly, it accounted for seven-in-ten of all medium to large enterprises in the ICT sector, and for about three-in-five in professional services and in transport. At the same time, while Dublin still had the largest numbers of large to medium companies in other sectors, its dominance was relatively less pronounced since it accounted for about a third of large companies operating in industry, construction, accommodation & food, and wholesale & retail. The Midland region had the lowest number of medium to large enterprises in all sectors.

At sectoral level, medium to large enterprises were most numerous in industry, with this sector accounting for almost a fifth of the total number operating in the State. In terms of internal regional composition, their share of the regional total ranged from 12% in Dublin to 28% in the Border and 31% in the Midland region. Wholesale & retail accounted for 16% of medium to large enterprises in the State, with the regional shares ranging from 13% in the Border and Mid-West regions to 20% in the South-West. At the level of the State, 11% of medium to large enterprises were in accommodation & food activities; they were relatively most numerous in the West region, where they accounted for 15% of regional total, while in the Midland and Dublin regions the corresponding figure was 8%.

Table 5. Number *of medium to large companies (employing 50 persons or over) by sector and region, 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Agriculture	20	20	20	10	10	10	10	10	90
Industry	90	190	60	50	60	70	100	70	680
Construction	10	40	10	0	10	10	10	10	110
Wholesale and retail	40	230	50	30	40	60	100	50	590
Transportation	10	70	10	*	10	10	10	*	120
Accommodation and food	40	130	30	10	30	50	70	40	390
Information and communication	*	110	10	*	10	10	20	10	160
Financial	*	140	*	*	*	*	10	10	170
Professional activities	10	150	10	10	20	10	40	20	260
Admin. and support	10	100	10	*	10	10	20	10	170
PAD	10	70	10	10	20	10	10	10	150
Education	40	130	40	20	30	40	50	20	360
Health and social work	40	120	30	20	30	30	50	30	350
Other NACE activities	10	90	10	*	10	*	10	10	130
Total	310	1,570	290	150	280	320	510	280	3,710

Source: SOLAS (SLMRU) analysis of Datalreland data

* All numbers have been rounded to the nearest 10. The cells with fewer than 5 companies are suppressed and are not depicted for confidentiality reasons.

Table 6a presents employment in manufacturing by technology intensity type for quarter 4 2014.⁹ Of the total 218,500 persons employed in manufacturing in the State, 17% were in Dublin, while 16% were in the South-West region; consequently, these two regions combined accounted for a third of total manufacturing employment in the State. In contrast, the Midland region accounted for only 6%.

Regarding the composition of manufacturing within regions, the Dublin region had the highest share of high tech manufacturing, at 41%, followed by the Mid-East and South-West regions, at 36% and 35% respectively. The Border and Midland regions had the lowest share of high tech manufacturing, at 11% each.

Furthermore, the Border had the highest share of low tech manufacturing, at 56%, followed by the Midland region, at 51%. The West region had the highest number of persons employed in medium-high tech manufacturing segment (just below 12,000), translating into 44% of the region's total manufacturing employment; consequently this region accounted for almost a third of all employed in this segment of manufacturing in the State. (Table 6b, Table 6c)

⁹ High tech manufacturing: pharmaceuticals and computer, electronic and optical products; medium-high tech manufacturing: chemicals, electrical equipment, machinery and equipment, motors and other transport equipment; medium-low tech manufacturing: coke/refined petroleum, rubber/plastics, non-metallic mineral products, basic metals and fabricated metal products; low-tech manufacturing: food and beverages, tobacco, textiles, wood, paper, furniture and printing.

Table 6a. Employment in manufacturing by technology intensity, Q4 2014

Manufacturing (segment)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	2,700	15,600	10,300	1,600	6,200	6,600	12,400	3,700	59,100
Medium-high	4,200	3,000	1,500	2,400	3,800	5,000	6,000	11,800	37,800
Medium-low	4,100	4,000	3,900	2,800	4,900	4,300	4,700	3,600	32,300
Low tech	13,900	15,300	12,900	7,200	8,300	12,100	12,000	7,700	89,300
Total	24,900	37,900	28,600	14,100	23,200	28,000	35,100	26,700	218,500

Table 6b. Employment in manufacturing by technology intensity: composition within regions (%)

Manufacturing (segment)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	11%	41%	36%	11%	27%	24%	35%	14%	27%
Medium-high	17%	8%	5%	17%	16%	18%	17%	44%	17%
Medium-low	16%	11%	14%	20%	21%	15%	13%	13%	15%
Low tech	56%	40%	45%	51%	36%	43%	34%	29%	41%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 6c. Employment in manufacturing by technology intensity: composition across regions (%)

Manufacturing (segment)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	5%	26%	17%	3%	10%	11%	21%	6%	100%
Medium-high	11%	8%	4%	6%	10%	13%	16%	31%	100%
Medium-low	13%	12%	12%	9%	15%	13%	15%	11%	100%
Low tech	16%	17%	14%	8%	9%	14%	13%	9%	100%
Total	11%	17%	13%	6%	11%	13%	16%	12%	100%

Source: Analysis by SOLAS (SLMRU) based on CSO data

Table 7a shows Gross Value Added (GVA) for each region and the State, GVA per person (at basic prices), indices of GVA per person (relative to an average of 100 for the State), and the share that each region contributes to the State's total GVA. While allowing for the possibility that some people and/or enterprises in one region may be contributing to the GVA in a neighbouring region, the relatively low level of GVA in a region can indicate that it is lacking in higher value-added economic activities. Output per person in relative terms (as measured by GVA and expressed as an index relative to an average of 100 for the State) was highest in Dublin, at 151.1 in 2012. The South-West was the only other region to exceed the State's average GVA per person - its index was 129.4. The corresponding figures for the Midland and Border regions were 54.3 and 55.4 respectively - the lowest of all regions.

In 2012, the Dublin region accounted for 41.9% of the State's total GVA, compared to just 3.3% for the Midland region. The South-West accounted for 18.7%, the West for 8%, while all other regions accounted for less than 8% each. Over the period 2011 to 2012, the relative performance, measured by the GVA indices per person and the shares of the State's total GVA, declined in the Border, Midland, South-East and (albeit only marginally) in Mid-East regions; it remained static in the Mid-West, South-West, and West regions, while it increased in Dublin.

Table 7a. Gross Value Added by region, per person (€), GVA indices, and the share of the State's total (2012 and 2011)

GVA indicators	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Gross Value Added (GVA) at Basic Prices (Euro Million, 2012)	9,795	65,987	12,147	5,261	10,447	11,742	29,512	12,589	157,481
Gross Value Added (GVA) per person at Basic Prices (Euro), 2012	19,016	51,839	22,863	18,638	27,464	23,588	44,391	28,256	34,308
Indices of GVA per person at Basic Prices (State=100), 2012	55.4	151.1	66.6	54.3	80.1	68.8	129.4	82.4	100
Gross Value Added (GVA) at Basic Prices (%), 2012	6.2	41.9	7.7	3.3	6.6	7.5	18.7	8	100
Gross Value Added (GVA) at Basic Prices (Euro Million, 2011)	10,095	64,644	12,120	5,285	10,345	11,988	29,207	12,508	156,192
Gross Value Added (GVA) per person at Basic Prices (Euro), 2011	19,653	50,928	22,877	18,773	27,272	24,150	44,058	28,154	34,124
Indices of GVA per person at Basic Prices (State=100), 2011	57.6	149.2	67	55	79.9	70.8	129.1	82.5	100
Gross Value Added (GVA) at Basic Prices (%), 2011	6.5	41.4	7.8	3.4	6.6	7.7	18.7	8	100

Source: CSO StatBank, County Incomes and Regional GDP 2012

The total value of industrial output in Ireland was €100.71 billion in 2012. The value of industrial gross output in the modern sector was €58.2 billion, while the value of output in the traditional sector was €42.5 billion. In Dublin, the modern segment accounted for three quarters of the value of output, whereas in the Border region it accounted for one fifth. (Table 7b) The South-West region alone accounted for just over a third of State's industrial output in 2012, while Dublin accounted for just over a fifth. In contrast, the Midland and Border regions accounted for 3% and 5% respectively. These two regions also had the lowest shares of output produced in the modern segment. When compared with 2011, the value produced in the modern sector declined in the West, South-West, Mid-West, and Border regions; it increased in the South-East, Dublin, Midland and Mid-East regions. (Table 7c)

Table 7b. Gross output in industrial local units by region, 2012 (€ billion)*

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	NA**	Ireland
Modern sector	1.16	16.0	4.3	0.7	3.4	7.4	22.5	2.7	-	58.2
Traditional sector	4.26	5.0	3.5	2.1	2.8	4.2	11.6	5.5	-	42.5
Industry total	5.4	21.0	7.8	2.8	6.25	11.6	34.0	8.1	3.7	100.7

Table 7c. Gross output in industrial local units by region, 2012 (%)

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	NA**	Ireland
Modern sector	2%	27%	7%	1%	6%	13%	39%	5%	-	100%
Traditional sector	10%	12%	8%	5%	7%	10%	27%	13%	-	100%
Industry total	5%	21%	8%	3%	6%	12%	34%	8%	4%	100%

Source: CSO (Census of Industrial Production, 2012)

* Note: Industry includes mining, manufacturing, energy and utilities sectors; the traditional sector includes NACE (Rev.2) codes: 05 to 17, 181,19, 22 to 25, 28 to 31, 321 to 324, 329, 33, 35 to 39; the modern sector includes NACE (REV.2) codes: 20, 21, 26, 27, 182, 325; the Census of Industrial Local Units covers all industrial local units with three or more persons engaged

** The industry total for the State includes the non-attributable (NA) category; therefore, neither the regional total percentages for the traditional sector nor for industry total rows add up to 100%.

At the State level, over the period 2009 - 2012, the number of persons engaged in manufacturing units that exported (at least some of their output) declined by 8.8%, while the contraction in the number of persons engaged in manufacturing units that did not export any of their output was relatively greater and amounted to 10.9%. While a fall in the number of persons engaged in manufacturing units that exported was observed across all regions over the period 2009 - 2012, Dublin and the Border region reported an increase in the number of persons engaged in manufacturing units that did not export.

Employment by occupation

In quarter 4 2014, there were approximately 1.93 million in employment in the State. Professionals were the largest occupation, amounting to 345,500 persons and accounting for 18% of total employment, followed by skilled trades (including farmers), amounting to 308,200 persons and accounting for 16%. Professionals comprised 22% of Dublin's employment, the highest share of all regions. In contrast, Dublin had the lowest share of employment in operative and skilled trades occupations, at 5% and 9% respectively. Dublin, together with the Mid-East region, had the highest share of its employment in associate professional occupations, at 14%. Dublin had the highest share of employment in relatively more skilled occupations, with the combined share of professionals and associate professionals exceeding one third of employment; the corresponding figure for the Border, Midland, Mid-West and South-East regions was about one fifth. (Table 8)

Table 8. Regional employment by occupational group (000s), Q4 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	12.1	56.7	20.0	7.3	11.0	16.2	21.9	13.1	158.4
Professionals	26.9	128.2	41.9	16.5	26.8	30.3	45.0	29.9	345.5
Associate professionals	17.0	84.4	32.5	11.1	13.4	18.7	30.1	19.6	226.8
Administrative and Secretarial	17.0	75.0	28.1	11.2	16.4	19.3	25.2	18.2	210.4
Skilled Trades	38.1	51.3	34.4	25.1	29.4	40.5	52.2	37.2	308.2
Caring, Leisure and Other Service	19.1	41.9	17.3	10.3	11.0	18.4	22.4	13.7	154.1
Sales and Customer Services	13.2	53.0	19.9	7.4	15.1	17.0	25.4	13.1	164.1
Operatives	15.0	30.0	17.5	10.9	13.0	17.5	19.4	17.9	141.1
Elementary Occupations	26.0	63.3	24.5	13.7	15.8	26.4	32.7	17.8	220.7
Total *	184.9	583.9	236.2	113.4	151.9	204.1	274.1	180.5	1,929.3

Source: Analysis by SOLAS (SLMRU) based on CSO data

* The 'not stated/other' category was excluded from this analysis (this category totalled approximately 10,000 for the State).

Inter-regional employment/residence

The employment data presented in this report is based on where a person's place of residence is, i.e. where a person resides, rather than where a person's place of work is. For some regions, where a person lives and where they work differs noticeably. This is most evident in the Mid-East region where only 54% of workers who resided in the region were also working there, while 40% were commuting to other regions, the overwhelming majority of them to Dublin. Commuting was also relatively widespread in the Midland region, with one fifth of workers travelling to work to other regions, in the main to Dublin, but also to the

South-East and Mid-East regions. In contrast, those residing in the South-West region and in Dublin were least likely to commute to other regions. (Table 9)

Table 9. Region of employment by region of residence, Q4 2014

	Border	Dublin	Mid - East	Midland	Mid - West	South - East	South - West	West	Total
Employed in same region	82%	94%	54%	74%	86%	84%	95%	86%	84%
Employed elsewhere	10%	3.5%	40%	19%	10%	9%	2%	10%	11%
No Answer	8%	2.5%	6%	7%	4%	7%	3%	4%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Analysis by SOLAS (SLMRU) based on CSO data

Vacancies (PES)

During the year 2014, there were 69,600 vacancies advertised on the DSP Jobs Ireland internet portal (Table 10).¹⁰ Of these, the highest numbers nationally were for elementary, caring, leisure and personal services, skilled trades, sales & customer care and associate professional occupations. This could be due to an occupational bias in advertising, as many employers advertise vacancies for higher skilled occupations through channels other than DSP Jobs Ireland.¹¹

While the distributions of vacancies by occupational groupings did not vary considerably across regions, with most vacancies advertised for the three broad occupational groupings - elementary, caring, leisure & personal services, and skilled trades occupations, there were some differences in relative shares of vacancies by occupations. Thus the share of elementary occupations ranged from 16% in the Border and Midland regions to 23% in the Mid-West and South-West regions; the share of caring/personal services vacancies ranged from 12% in the South-East to 24% in the Mid-East region; the share of vacancies for skilled trades ranged from 12% in Dublin to 19% in the South-West and West; the share of associate professional vacancies ranged from 6% in the Midland to 16% in the South-East region, while the share of operatives ranged from 6% in the West to 13% in the Mid-East region.

Dublin had over 25,000 PES vacancies advertised and the highest number of vacancies across all occupational groups. Dublin accounted for over a third (36%) of vacancies, followed by the South-West and Mid-East regions, accounting for 14% and 12% respectively. In contrast, the Midland and Mid-West regions accounted for just 6% and 7% respectively.

¹⁰ These refer to all vacancies advertised by employers through the National Contact Centre in the Department of Social Protection (DSP Jobs Ireland). The vacancy data presented in this report excludes vacancies advertised as part of Work Placement and JobBridge schemes, but does not exclude vacancies advertised by recruitment agencies (e.g. for nursing posts).

¹¹ The distributions of vacancies advertised through DSP Jobs Ireland are skewed towards skilled trades, caring/leisure services and elementary occupations. On the other hand, vacancies advertised through IrishJobs.ie (a private online advertising service) are skewed towards managerial, professional and associate professional occupations. In 2014, vacancies for professional occupations accounted for 7% of all vacancies advertised through DSP Jobs Ireland compared to 31% of all vacancies advertised through IrishJobs.ie. The number of vacancies advertised through DSP Jobs Ireland in 2014 was over double the number advertised through IrishJobs.ie (i.e. on average 5,700 vacancies per month compared to 2,500 per month respectively).

Table 10. Number of vacancies by occupational group and region, 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	94	531	87	52	80	106	278	101	1,329
Professionals	564	1,998	448	268	359	307	602	410	4,956
Associate professionals	734	2,999	616	263	519	865	845	531	7,372
Administrative and Secretarial	410	1,864	375	162	290	265	702	532	4,600
Skilled Trades	1,047	3,074	1,290	777	833	1,007	1,840	1,013	10,881
Caring, Leisure and Other Service	1,214	4,284	1,949	972	629	654	1,518	865	12,085
Sales and Customer Services	841	2,825	699	590	514	589	904	575	7,537
Operatives	593	2,545	1,054	477	341	513	843	312	6,678
Elementary Occupations	1,061	5,278	1,587	703	1,085	1,147	2,224	1,067	14,152
Total	6,558	25,398	8,105	4,264	4,650	5,453	9,756	5,406	69,590

Source: DSP Jobs Ireland database

Sourcing skills from outside the European Economic Area (EEA)

Table 11 presents the data on new employment permits issued to non-EEA workers in 2014. It illustrates that some vacancies continue to prove difficult to fill from the domestic supply and from within the EEA labour supply.¹² There were approximately 4,900 new employment permits issued to non-EEA citizens overall. New employment permits were issued in all regions, although the majority were issued in Dublin (approximately 2,600 or just above a half of all). Two thirds of employment permits were issued for professional occupations, 16% for associate professionals, 7% for skilled trades, and 5% for managerial occupations.

Table 11. Number of new employment permits by occupation and region, 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West*	South-East	South-West	West	Total
Managers	4	164	8	1	11	5	23	4	220
Professionals	259	1,705	189	267	142	192	315	185	3,254
Associate professionals	7	504	153	5	19	15	41	16	760
Administrative and Secretarial	2	44	5	0	4	1	7	0	63
Skilled Trades	17	128	157	5	19	18	19	22	385
Caring, Leisure and Other Services	2	26	21	4	2	4	16	7	82
Sales and Customer Services	7	24	0	0	2	0	5	1	39
Operatives	3	8	16	0	1	2	3	2	35
Elementary Occupations	1	9	1	1	0	6	4	1	23
Total	302	2,612	550	283	200	243	433	238	4,861

Source: DJEI

* Tipperary is not included in the Mid-West figures; all Tipperary permits are included in the South-East figures.

¹² When interpreting employment permit data, it should be noted that the number of work permits issued for most occupations may represent an over-estimation of the true annual inflow of non-EEA workers into the Irish labour market because not all new employment permits are issued to first time applicants; for instance, when an employment permit holder is made redundant, or moves to a new employer, a new permit is issued rather than the old permit being renewed.

Labour market demand and job opportunities

Over the period quarter 4 2013 to quarter 4 2014, it is estimated that there were approximately 29,000 net jobs added to the employment stock in the State. This is consistent with the labour market transition analysis which showed that in 2014, at the level of the State, the number of transitions into employment, either from unemployment or inactivity, exceeded transitions out of employment.¹³ More precisely, there were almost 40,000 more transitions from unemployment into employment than the other way around, while there were over 11,000 more transitions from inactivity into employment than in the opposite direction.¹⁴ Coupled with this, there were more transitions into employment in 2014 than out of it, and it is estimated that the probability of transitioning from unemployment to employment increased from 11.8% in 2013 to 13.4% in 2014.

Consistent with the above picture emerging from considering the labour market transitions, although not directly comparable (since, *inter alia*, exits into inactivity are not considered below) is the finding that almost 265,000 persons in the State reported they had entered new employment during 2014,¹⁵ while 82,000 became unemployed during the year. Based on these statistics at regional level, Dublin had the most vibrant labour market of all regions - it is estimated that, in this region in 2014, those that entered employment outnumbered those that became unemployed by the ratio of 4.5:1; in contrast, the South-East and West regions had the lowest ratio of 2.4:1. Furthermore, those that entered employment in Dublin during 2014 amounted to 17% of its labour force, which was the highest share of all regions.

It should be borne in mind that, in addition to expansion demand that is readily associated with the increase in net jobs added, job opportunities arise due to replacement demand, that is to say, labour market demand arising from retirements and other exits from employment. In addition, job opportunities may arise due to both inter-occupational (i.e. a person remaining in employment but changing occupation) and intra-occupational (a person remaining in employment and in occupational grouping but changing an employer) movements, each accounting for a sizeable share of labour market transitions.¹⁶

In the National Skills Bulletin 2015, replacement rates were estimated for broad occupations based on identifying the number of transitions from employment to inactivity (e.g. retirement, home duties, study, exits due to ill health, etc.) and making appropriate adjustments for net losses arising from inter-occupational movements. In this regard, for some occupations, the inclusion of net losses from inter-occupational transitions increased the replacement demand (given that transitions out of an occupation were greater than transitions in), while for other occupations it decreased the replacement demand (transitions in an occupation were greater than transitions out). The analysis highlighted that some occupations are characterised by relatively high replacement rates. Hence, above average replacement rates were found for elementary, sales, and services occupations, while below average replacement rates were detected for managers, professionals, associate professionals, and tradespersons.

¹³ Labour market transition relates to the change in the labour market status (ILO defined) of individuals over time; the labour market status is: employed, unemployed, and economically inactive.

¹⁴ National Skills Bulletin 2014, and National Skills Bulletin 2015, SOLAS (SLMRU) for the EGFSN.

¹⁵ Refers to persons in employment in the fourth quarter of 2014 who started working during 2014 for their current employer or started working as self-employed.

¹⁶ The assumption is that the person changing an occupation and/or an employer is being replaced.

Based on the employment levels in quarter 4 2014 and appropriate replacement rates based on the transitions' analyses (2014), an estimate of replacement demand for each region by broad occupations is presented below. Consequently, employment opportunities are set to arise across all occupational groups in all regions. (Table 12)

Table 12. Estimated* replacement demand by occupational group and region, based on Q4 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	600	2,700	1,000	400	500	800	1,100	600	7,600
Professionals	1,200	5,500	1,800	700	1,100	1,300	1,900	1,300	14,700
Associate professionals	900	4,400	1,700	600	700	1,000	1,600	1,000	11,900
Administrative & Secretarial	1,400	5,500	2,100	800	1,200	1,400	1,900	1,300	15,500
Skilled Trades	2,200	3,200	2,100	1,600	1,800	2,500	3,300	2,300	19,200
Caring/Leisure	1,800	5,000	2,000	1,200	1,300	2,200	2,600	1,600	18,200
Sales & Customer Service	1,800	5,800	2,200	800	1,700	1,900	2,800	1,400	18,000
Operatives	1,500	2,400	1,400	900	1,000	1,400	1,500	1,400	11,100
Elementary occupations	3,000	8,700	3,400	1,900	2,200	3,600	4,500	2,400	30,200
Total**	14,300	43,200	17,700	8,900	11,500	21,200	18,900	13,300	146,400

Source: Analysis by SOLAS (SLMRU) based on CSO data

* Note: Estimates are based on Q4 2014 employment levels for nine occupational groups (excluding the 'not stated' category) and replacement rates ranging from 4% for professionals to 14% for elementary occupations (an average annual replacement rate was 6.9%).

** Horizontal (i.e. regional) and vertical (i.e. occupational) sub-totals do not add up to the precisely same figure due to rounding.

As highlighted above, transitions out of employment into inactivity create replacement demand. Table 13 shows the occupations with relatively high share of persons in an occupation who exited employment into inactivity during 2014. The share of exits was particularly high for elementary occupations, especially for those where seasonality is an issue (e.g. agricultural labourers, waiters/waitresses, bar, and kitchen & catering staff), for some routine operatives (particularly routine operatives working in packaging), for some personal services occupations (e.g. child-minders, care workers), and for sales occupations (e.g. sales assistants).

Consistent with the above, at more detailed occupational level, the highest replacement rates were found for sales occupations (sales assistants, sales executives, and customer care agents), caring personal services occupations (care workers & home carers, child-minders), segments of workers in accommodation and food services (waiters, catering assistants), segments of administrative occupations (general, receptionists, payroll) as well as for farmers, hairdressers, labourers (agricultural, construction, cleaning, packing), operatives (drivers, assemblers, plant and construction operatives), carpenters, gardeners, fitness instructors, IT technicians, and educational assistants.

While the analysis was conducted at a national level, these patterns in exits from employment by occupation are a useful reference point for examining replacement demand at a regional level.

Table 13. Exits to inactivity from employment for occupations with the highest number of transitions to inactivity, 2014

Exits to Inactivity		
Occupation/Occupational Group	No. of Exits	Share (%) of Employment
Sales & retail assistants, cashiers and check-out operators	13,100	11.4%
Farmers	6,200	7.8%
Care workers and home carers	5,600	11.2%
Waiters and waitresses	4,700	17.1%
Other administrative occupations n.e.c.	4,700	8.3%
Elementary construction occupations	3,900	11.5%
Kitchen and catering assistants	3,600	15.5%
Child-minders and related occupations	3,500	19.1%
Bar staff	3,200	17.2%
Cleaners and domestics	2,900	8.7%
Farm workers	2,800	41.4%
Nurses and midwives	2,500	4.5%
Hairdressers, barbers, beauticians and related occupations	1,800	8.1%
Primary and nursery education teaching professionals	1,800	4.6%
Book-keepers, payroll managers and wages clerks	1,800	8.7%
Business sales executives	1,800	7.4%
Secondary education teaching professionals	1,700	5.7%
Educational support assistants	1,400	11.0%
Personal assistants and other secretaries	1,300	4.6%
Packers, bottlers, canners and fillers	1,200	26.6%
Receptionists	1,200	11.2%
Teaching, special needs and other educational professionals n.e.c.	1,200	12.2%
Functional managers and directors n.e.c.	1,200	2.6%
Vehicle technicians, mechanics and electricians	1,100	6.2%
Construction operatives n.e.c.	1,000	14.9%
Bus and coach drivers	1,000	11.5%
Housekeepers and related occupations	1,000	19.1%
Taxi and cab drivers and chauffeurs	1,000	4.7%

Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment change over time - trends and expected demand

In this section, employment changes by sector over the medium term (five-year) period, from quarter 4 2009 to quarter 4 2014, and the most recent year-on-year employment changes between quarter 4 2013 and quarter 4 2014 are examined. Employment changes and trends by sector are informative since they provide an indication of the changes in the regional business landscape. Furthermore, they may provide some indication regarding the expected employment changes in the future. This theme is developed further by considering employment outlook by occupation, taking into account replacement demand, as well as expansion demand, where applicable.

Employment change 2009-2014

Between quarter 4 2009 and quarter 4 2014, employment in Ireland increased by approximately 17,500 (Table 14). Over this five-year period, i.e. between these two points in time, employment declined in four regions however, namely in the Border, West, South-West, and Mid-West regions, with the most pronounced decreases occurring in the West and Border regions. Conversely, employment expanded in other regions and particularly strongly in the South-East region (by 5.5%) with approximately 10,600 additional persons at work in quarter 4 2014 when compared to quarter 4 2009. Dublin added in excess of 13,000 persons to employment over the period.

With regard to sectoral employment, the biggest decline over the period, at the level of the State, occurred in construction - it contracted in all regions with the exception of the Mid-East and Mid-West regions, where it remained static. The sharpest contraction for this sector was recorded in the Border, while the decline was also pronounced in the West and South-West regions. Public administration & defence (PAD) also contracted sharply over the period by 11% overall, with this decline observed across most of the regions, with the exception of the Midland and Dublin regions, where it remained static.

Industry also contracted overall, with the Dublin, Border, and Midland regions particularly adversely affected and accounting for effectively the entire decline in the sector. However, the sector expanded in the West and South-East regions over the period. Financial services contracted overall, with relatively small changes observed across regions. Transportation & storage was another sector to contract over the period; while Dublin accounted for most of the decline, it was also observed in the West and Mid-West regions.

Agriculture, professional services, health, accommodation & food services, ICT, education, and wholesale & retail all expanded over the period. Accommodation & food services and ICT expanded particularly strongly in Dublin. Subsequently, Dublin, and to a smaller extent, the South-West region, accounted for the entire growth of the ICT sector employment. Wholesale and retail increased particularly strongly in the South-East region.

The largest increase, in relative terms, in employment in the health sector was observed in the Midland, followed by the South-East region. Education expanded overall, with Dublin and the South-East accounting

for a sizeable share of the increase; it also grew in the Mid-East and Mid-West regions, remained static in the Border, Midland, and West regions, while it declined in the South-West region.

Dublin, together with most of the regions with the exception of the Border and West regions, increased the numbers in employment in professional services. However, the Mid East region reported the strongest growth in this sector and it is in the main due to this development that the region increased the share of its employment in knowledge intensive services by two percentage points, from 15% in quarter 4 2009 to 17% in quarter 4 2004.

Table 14. Employment change by sector and region (000s), Q4 2009 - Q4 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture, forestry and fishing	3.8	1.5	-1.2	2.7	*	4.1	1.9	3.4	16.3
Industry	-3.8	-6.2	*	-3.0	*	2.3	*	4.3	-7.1
Construction	-7.2	-3.1	*	-1.2	*	-2.3	-3.2	-4.6	-22.2
Wholesale and retail trade; repair of motor vehicles and motorcycles	1.2	*	-1.1	-1.3	*	3.7	2.0	-2.6	2.9
Transportation and storage	*	-6.0	2.4	1.8	-2.0	*	*	-2.3	-4.5
Accommodation and food service activities	2.3	10.1	2.5	*	-1.7	*	1.2	-2.4	10.4
Information and communication	*	9.1	*	*	*	*	2.6	*	9.6
Financial, insurance and real estate activities	*	-1.1	-1.7	*	*	*	-1.7	*	-5.5
Professional, scientific and technical activities	*	2.7	4.0	1.3	1.4	1.7	1.0	*	12.5
Administrative and support service activities	*	*	*	*	*	*	*	*	1.1
Public administration and defence; compulsory social security	-3.3	*	-2.4	*	-1.4	-2.7	-1.0	*	-12.1
Education	*	2.8	1.4	*	1.4	1.9	-1.8	*	5.6
Human health and social work activities	2.0	2.8	1.1	4.5	*	2.6	-1.0	*	12.8
Other NACE activities**	*	*	*	*	*	*	-2.1	*	-2.4
Total	-4.5	13.2	5.6	3.9	-2.6	10.6	-3.1	-5.6	17.5

Source: Analysis by SOLAS (SLMRU) based on CSO data

* Estimates for number of persons employed are too small for reliable statistical inferences;

** Other NACE activities include the residual category where no specific NACE sector could be assigned.

Employment change 2013-2014

Total employment expanded by approximately 29,000 (translating into a 1.5% increase) over the period from quarter 4 2013 to quarter 4 2014. Employment increased across most regions, with the exception of the South-West and West regions (where it declined) and the Border region (where it remained unchanged). The most pronounced increases, in absolute terms, were recorded in the Dublin and Mid-East regions, with approximately 15,400 and 12,000 additional persons in employment respectively. The Mid-East region had the highest increase in relative terms, of 5%, followed by the South-East region, where employment increased by 4%. (Table 15)

Table 15. Employment change by sector and region (000s), Q4 2013 - Q4 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture, forestry and fishing	*	-1.1	*	-2.2	*	-2.9	-2.2	-2.3	-10.9
Industry	2.3	*	2.5	*	*	3.2	-5.4	-1.5	*
Construction	-1.3	2.4	3.7	2.0	1.0	2.4	2.9	*	13.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	-4.1	5.5	*	*	3.3	1.9	*	*	6.3
Transportation and storage	-1.5	*	1.6	1.6	-2.3	*	1.7	-1.0	*
Accommodation and food service activities	2.3	-2.2	*	*	*	1.7	1.8	-1.3	1.8
Information and communication	-1.5	*	*	*	*	*	2.4	*	1.0
Financial, insurance and real estate activities	*	6.4	*	*	*	*	*	*	4.7
Professional, scientific and technical activities	*	-1.3	1.1	*	2.8	1.3	*	-2.0	1.9
Administrative and support service activities	*	*	*	1.0	*	1.1	*	*	1.1
Public administration & defence; compulsory social security	*	*	*	*	-1.1	*	1.3	*	*
Education	*	4.4	*	*	*	1.5	*	1.1	7.1
Human health and social work activities	2.4	*	1.0	*	1.0	-2.3	-4.4	1.4	*
Other NACE activities **	2.0	1.2	1.0	*	-1.2	*	-1.7	1.8	3.6
Total	*	15.4	12.0	2.6	1.5	7.4	-5.0	-4.8	29.1

Source: Analysis by SOLAS (SLMRU) based on CSO data

* Estimates for number of persons in a cell are too small to be considered reliable.

** Other NACE activities include the residual category where no specific NACE sector could be assigned.

In terms of economic sectors, the largest employment increase nationally over the period occurred in construction, which expanded by approximately 13,000 (or 13%). The growth for this sector was particularly strong in the Mid-East region.

Nationally, there were also relatively strong increases in financial services and education (by 4.8% each), and, albeit to a lesser extent, in wholesale & retail (by 2.3%). Dublin accounted for the entire increase in the financial services sector employment and for the largest share of the increase in education. This region also accounted for almost all of the increase observed in wholesale & retail, although the sector also reportedly expanded relatively strongly in the Mid-West while at the same time, it contracted in the Border region.

Professional services and administrative activities each expanded in line with the national average of 1.5%. There were relatively small increases in accommodation & food and the information & communication (ICT) sector, at about 1.2% each. The South-West region was behind the increase observed in the ICT sector. Other sectors, namely industry, transportation & storage, PAD, and human health & social work remained static, while an apparently sizeable decrease was reported for agriculture.¹⁷ (Table 15)

Employment outlook by occupation

Table 16 presents a list of occupations with higher than average medium term employment growth prospects. It depicts the occupations for which job opportunities are expected to be arising relatively more readily. The numbers employed in 2014 (annual average figures) for each occupation are shown in order to provide the context for the relative magnitude of job opportunities which may arise from recruitment requirements, comprising both replacement and expansion demand.

The share of third level graduates employed in these occupations at present (i.e. in the fourth quarter of 2014) is also depicted since it can serve as a guideline for the level of education and training provision required for these occupations.

A broad indication of unemployment (i.e. whether the rate of unemployment for an occupation is above or below the national average) is provided where numbers are sufficiently large.¹⁸

The employment prospects expectations are based on the medium term employment growth projections associated with, and arising out of the assumed *recovery scenario*, deemed the closest to the economic situation as it unfolded since the beginning of 2013 to date and therefore the most appropriate to use.¹⁹

¹⁷ As QNHS is a sample survey, it is subject to sampling error. Precision estimates are calculated for key variables. Estimates of employment in agriculture have been shown to be sensitive to sample changes over time, and employment growth rates in this sector should be interpreted with caution, especially at regional level. CSO, *Standard Report on Methods and Quality for QNHS* (various publications / versions).

¹⁸ Numbers in employment and unemployment, and subsequently, unemployment rates, associated with occupations where employment is comparatively small are less reliable due to a greater risk of sampling error.

¹⁹ Occupational Employment Projections 2020, SOLAS, February 2014.

Table 16. Selected occupations with positive medium term labour market outlook (State)

Occupation	Number Employed (2014)*	% 3rd Level Graduates	Unemployment
Functional managers & directors	49,500	61%	Below average
Production managers in manufacturing, mining & energy	12,500	70%	n/a
Advertising, marketing & sales directors	4,800	60%	n/a
Human resource managers	5,900	91%	n/a
ICT specialist & project managers	15,500	81%	n/a
Financial institution managers & directors	4,300	68%	n/a
Managers & directors in transport & logistics	6,300	39%	n/a
Managers & directors in retail & wholesale	16,000	47%	Below average
Restaurant managers	6,300	40%	n/a
Managers & proprietors in other services	27,100	44%	Below average
Electrical & electronic engineers	3,200	94%	n/a
Production, process, design & development engineers	4,200	94%	n/a
Quality control engineers	3,600	88%	n/a
IT Business analysts & systems designers	3,500	82%	n/a
Programmers & software developers	17,700	93%	n/a
ICT professionals n.e.c.	7,300	79%	n/a
Legal professionals	10,100	97%	n/a
Accountants & tax experts	38,500	97%	n/a
Mgt. consultants, business analysts & project managers	8,400	95%	n/a
Actuaries, economists & statisticians	7,800	89%	n/a
Media professionals	5,600	82%	n/a
Electrical, electronic & engineering technicians	5,100	70%	n/a
Process & quality assurance technicians	4,600	77%	n/a
IT operations technicians	9,300	71%	n/a
IT user support technicians	5,000	75%	n/a
Artistic, literary & media occupations	16,800	65%	Below average
Sports & fitness occupations	8,300	57%	n/a
Brokers & insurance underwriters	4,000	65%	n/a
Finance & investment analysts	7,000	86%	n/a
Financial & accounting technicians	3,400	85%	n/a
Financial accounts managers	9,100	76%	n/a
Other business associate professionals	8,800	76%	n/a
Marketing associate professionals	5,300	87%	n/a
Sales accounts & business development managers	16,400	76%	n/a
Regulations inspectors; health & safety officers	4,000	75%	n/a
Financial administrative occupations	54,000	56%	Below average
Office managers & supervisors	8,800	47%	n/a
Metal forming, welding & related trades	10,00	13%	n/a
Metal machining, fitting & instrument making trades	27,300	33%	Below average
Electrical and electronic trades etc.	33,900	45%	Below average
Sales related occupations	12,000	35%	Below average
Sales supervisors	3,900	31%	n/a
Customer service occupations	21,200	46%	Below average
Road transport operatives/drivers	57,800	11%	Below average

Source: Analysis by SOLAS (SLMRU) based on CSO data and SOLAS/ESRI Occupational Employment Forecasts 2020

* Employment figures depicted are annual average figures for the State for 2014 (i.e. the average of the four quarters in 2014).

Job announcements

At the outset, it should be borne in mind that announcements of job creation in the media are characterised by a certain lead-time and, consequently it may take a number of years for all the jobs to materialise.

Monitoring of recent job announcements shows that job creation continued to occur. It is estimated that in 2014, the number of jobs expected to be created exceeded the number of jobs lost or expected to be lost in the short term. This trend continued during the first two quarters of 2015. While there were job creation announcements across all regions, they were particularly strong in the Dublin region.²⁰

Live Register

The Live Register is a monthly count of the number of persons under 65 years of age registering for Jobseekers Benefit or Allowance or various other statutory entitlements with the Department of Social Protection. Live Register statistics are compiled from administrative returns made to the CSO by each local office of the Department of Social Protection. The Live Register is not specifically designed to measure unemployment - it includes persons who are working part-time and who are in casual employment, and signing on part-time. At the same time, a number of the unemployed are not on the Live Register because they were previously self-employed, have a spouse earning, or for other reasons. However, Live Register statistics are available at a detailed geographic level such as local social welfare offices of registration - providing indicative movements in the number of unemployed persons at local level, which makes them a very useful resource for regional analysis.

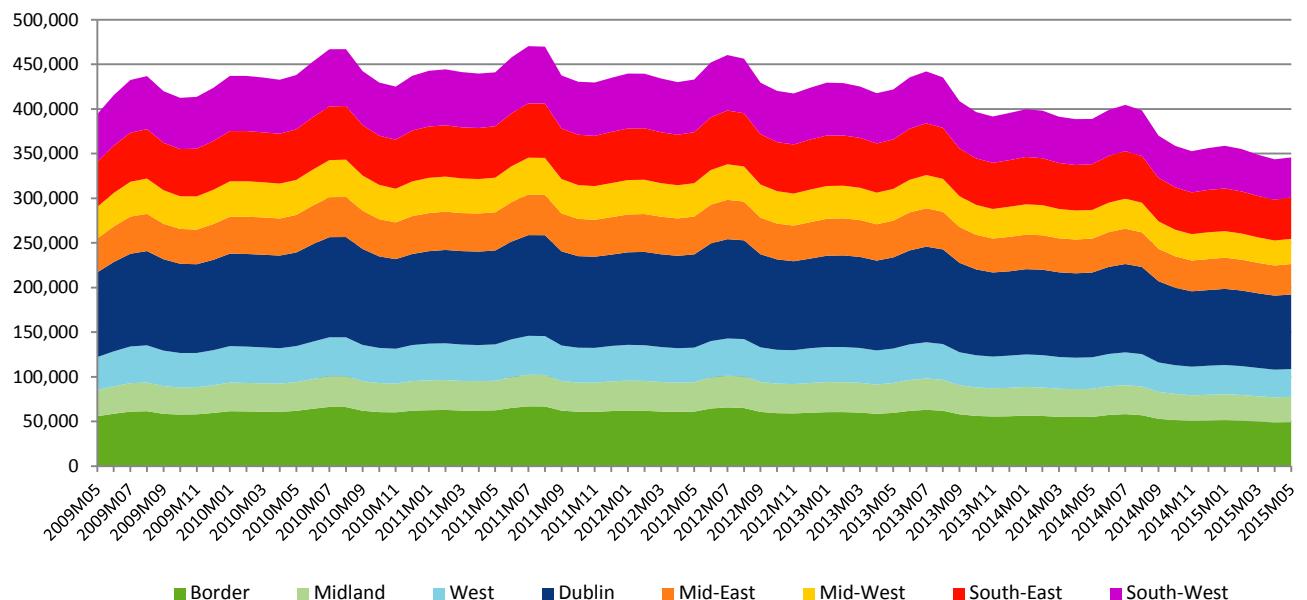
In May 2015, there were approximately 345,600 persons on the Live Register.²¹ This amounted to a year-on-year decrease of approximately 43,100 (11%). The numbers on the Live Register declined in all regions over the period, with the most pronounced decline, in relative terms, being observed in the Mid-West region (by 12.2%), followed by Dublin (12%); at 9.3%, the South-East reported the smallest decline in relative terms. The rate of decline accelerated when compared with the period May 2013-May 2014. In May 2015, the Midland and Mid-West regions each accounted for 8% of all those on the Live Register; the Mid-East accounted for 10%, the South-East and South-West region accounted for 13% each; the Dublin region alone accounted for 24%.

During the period under observation, from May 2009 to May 2015, the numbers on Live Register peaked for most regions in July and August 2011, while the lowest point was April or May 2015. The decline from the peak was most pronounced in the Mid-West region (by a third), whereas it was relatively smallest in the Midland (by a fifth). It should be borne in mind that there is a pronounced seasonality in the numbers signing on the Live Register, with the numbers increasing during the summer months and declining in September. (Figure 1)

²⁰ The focus is on the job announcements made in the second half of 2014, and the first half of 2015.

²¹ Live Register unadjusted figures.

Figure 1. Persons on Live Register by Region, May 2009-May 2015



Source: Analysis by SOLAS (SLMRU) based on CSO data

In May 2015, the age distributions of persons on the Live Register were broadly similar across regions. The share of persons younger than 25 on the Live Register ranged between 12% (in the South-West and West region) and 15% (in the Midland region). (Table 17a, Table 17b)

Table 17a. Number of persons on the Live Register by age group and region, May 2015

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	7,093	11,279	4,674	4,287	3,930	6,727	5,212	3,884	47,086
25 years and over	42,093	72,221	29,516	23,971	24,248	39,736	39,489	27,273	298,547
Total	49,186	83,500	34,190	28,258	28,178	46,463	44,701	31,157	345,633

Table 17b. Distribution of Live Register by age group and region (%), May 2015

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	14%	14%	14%	15%	14%	14%	12%	12%	14%
25 years and over	86%	86%	86%	85%	86%	86%	88%	88%	86%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Analysis by SOLAS (SLMRU) based on CSO data

In May 2015, males accounted for the 60.4% of persons on the Live Register nationally, and the gender distributions were similar in each region. Within the regions, the highest share of males was in Dublin (62.5%) while the lowest shares were in the Mid-East and West regions, at 58% each. Compared with the situation a year ago, the share of females declined in all regions. (Table 18a, Table 18b)

Table 18a. Number of persons on the Live Register by gender and region, May 2015

Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	29,308	52,150	20,029	16,675	16,820	28,243	27,112	18,321	208,658
Female	19,878	31,350	14,161	11,583	11,358	18,220	17,589	12,836	136,975
Total	49,186	83,500	34,190	28,258	28,178	46,463	44,701	31,157	345,633

Table 18b. Distribution of Live Register by gender and region (%), May 2015

Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	59.6%	62.5%	58.6%	59.0%	59.7%	60.8%	60.7%	58.8%	60.4%
Female	40.4%	37.5%	41.4%	41.0%	40.3%	39.2%	39.3%	41.2%	39.6%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

The concept of unemployment in the report is based on the official measure of unemployment as defined by the ILO and implemented by the CSO in the Quarterly National Household Survey (QNHS).²² Table 19 presents unemployment by sector and region for quarter 4 2014. Of the 213,600 unemployed persons, about four fifths or approximately 168,000 have reportedly had some previous employment experience, while about two thirds, or just above 145,200 have stated their previous sector of employment. At the level of the State, approximately 31,500 persons (22%) had previously been employed in the construction sector; this was the largest of all sectors of previous employment. Consequently, within each region, the number (and share) of unemployed persons previously employed in construction was higher than for any other sector, with the exception of Dublin, where it was identical to the share previously employed in wholesale and retail (16%). The South-East and South-West regions had the highest share of unemployed who had previously worked in construction, while Dublin had the lowest. The Border region had the largest share previously employed in wholesale and retail (at 18%), while the Mid-West (at 10%) had the lowest.

The Mid-West had the highest share of those previously employed in industry (at 21%), followed by the Midland region (at 20%); the lowest share was in the West (at 10%), followed by Dublin (11%). However, with 55,500 persons unemployed, Dublin accounted for 26% of total national unemployment. Therefore, although it had a relatively low share of its unemployed who previously worked in industry, in absolute terms, the number was still higher than in any other region; subsequently, Dublin accounted for 20% of all unemployed in the State who were previously employed in industry. Almost 14,000 persons were previously employed in accommodation and food services, amounting to almost one-in-ten of all who stated their previous sector of employment. Dublin accounted for 27% of all unemployed in the State who were previously employed in accommodation and food services. (Table 19)

²² The unemployed comprise all persons above a specified age who during the reference period were: without work (that is, were not in paid employment or self-employment), currently available for work (that is, were available for paid employment or self-employment), and seeking work (that is, had taken specific steps in a specified recent period to seek paid employment or self-employment). Source: International Labour Organization (ILO), Eurostat, OECD. While commentators in discussions on unemployment frequently use Live Register data, this data source was not specifically designed to measure unemployment.

Table 19. Unemployment by sector and region, (000s) Q4 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	State
Agriculture, forestry and fishing	*	*	*	*	*	*	*	*	2.5
Industry	2.0	3.9	2.4	2.5	2.5	3.0	2.5	1.3	20.0
Construction	3.1	5.8	3.4	2.6	2.5	5.3	5.7	3.1	31.5
Wholesale & retail; vehicle repair	2.5	5.8	2.7	1.8	1.1	2.3	2.7	1.9	20.9
Transportation and storage	*	1.8	*	*	*	*	*	*	4.8
Accommodation & food service	1.5	3.7	1.2	1.2	*	2.3	1.8	1.1	13.8
Information and communication	*	1.4	*	*	*	*	*	*	4.4
Financial, insurance & real estate	*	1.8	*	*	*	*	*	*	4.4
Prof., scientific & tech. activities	*	1.7	*	*	*	*	*	1.0	5.5
Admin. and support activities	*	2.5	*	*	*	*	1.5	*	7.7
PAD	*	*	*	*	*	*	*	*	3.4
Education	*	1.6	*	*	*	1.2	1.3	1.2	6.6
Human health and social work	*	2.1	1.3	*	*	1.5	1.6	1.1	9.7
Other NACE activities	*	3.2	1.2	*	*	1.3	1.5	*	9.9
No sector given	6.9	19.3	6.5	5.0	5.5	7.8	10.4	7.0	68.5
Total	20.6	55.5	22.0	17.2	17.3	27.7	32.7	20.6	213.6

Source: Analysis by SOLAS (SLMRU) based on CSO data

* Estimates for number of persons in a cell are too small to be considered reliable.

Table 20 shows unemployment by occupation and region. Reflecting the size of its labour market, Dublin had the highest number of persons unemployed in each occupational grouping - it accounted for 35% of all who previously worked in professional occupations, 40% of unemployed associate professionals and for about a quarter of each of administrative and sales occupations in the State. Overall, those who were previously in skilled trades occupations were the most numerous, followed by those who were in elementary occupations.

Table 20. Unemployment by occupational group and region, (000s) Q4 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Managers	1.4	1.8	1.1	*	*	1.0	*	*	7.9
Professionals	*	3.4	*	*	1.2	*	1.8	*	9.7
Associate professionals	*	4.8	1.0	*	1.1	*	1.5	1.7	12.1
Administrative & secretarial	*	2.8	1.2	*	1.3	1.5	1.9	1.5	11.5
Skilled trades	4.1	6.9	2.6	2.8	2.8	4.6	5.9	3.8	33.6
Caring/leisure	*	2.3	1.0	1.2	*	2.1	2.2	1.3	11.6
Sales & customer service	2.0	4.0	2.0	1.3	1.1	2.0	2.2	1.2	15.7
Operatives	1.4	3.1	2.0	1.5	1.3	3.0	1.8	1.0	15.2
Elementary occupations	2.7	7.0	3.5	2.7	1.5	4.3	4.2	1.7	27.6
No occupation**	6.9	19.3	6.5	5.0	5.5	7.8	10.4	7.0	68.5
Total	20.6	55.5	22.0	17.2	17.3	27.7	32.7	20.6	213.6

Source: Analysis by SOLAS (SLMRU) based on CSO data

** Relates to other/not stated; the total figures depicted for each region therefore include this category.

Within the regions, the Border had the highest share of the unemployed who were previously employed in skilled trades (at 20%); in contrast, the Mid-East and Dublin regions, at 12% each, had the lowest. The Mid-East, Midland, and South-East regions had the highest shares of unemployed who were previously in elementary occupations (16% each), while the West region had the lowest (8%); it also had the lowest share of unemployed who previously worked as operatives.²³ Overall, about a third of unemployed had no/had not stated their previous occupation.

Table 21 shows the distribution of unemployed persons by region and education level. The largest share of the unemployed within each region had attained at most lower secondary education (with the exception of the Midland region, where those with higher secondary education were the most numerous and accounted for 35%); the share ranged from 37% in the Border to 24% in the Midland region.²⁴

In absolute terms, Dublin had the highest number of those unemployed with at most lower secondary education, amounting to almost 16,000; thus Dublin accounted for 26% of the unemployed with at most lower secondary education in the State. The share of the unemployed with third level degree qualifications was the highest in the West and Dublin regions, at 21% each. At 22% each, the Midland and South-West regions had the highest share of unemployed with some FET qualifications, while Dublin, at 14% had the lowest.

Table 21. Unemployment by education and region, (000s) Q4 2014

Education	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Lower secondary or below	7.4	15.8	6.8	4.0	5.0	7.9	8.8	5.3	61.1
Higher secondary	5.4	15.3	6.2	5.9	4.7	7.5	8.1	5.0	57.9
FET	2.9	7.6	4.0	3.8	2.4	5.2	7.0	3.3	36.1
3 rd level non degree	1.5	4.2	2.0	1.5	1.1	2.6	2.2	2.1	17.1
3 rd level degree or above	2.6	11.7	2.5	1.6	3.0	3.4	5.8	4.2	34.8
Other/not stated	*	*	*	*	1.2	1.1	*	*	6.6
Total (including 'other/not stated')	20.6	55.5	22.0	17.2	17.3	27.7	32.7	20.6	213.6

Source: Analysis by SOLAS (SLMRU) based on CSO data

Across the regions, young people continue to face appreciably more difficult labour market as evidenced by relatively higher rates of unemployment for those younger than 25 years of age. These rates were particularly elevated in the Midland and South-East regions, at 29.6% and 29% respectively. In contrast, the Mid-East and Dublin regions had the lowest rates, at 14.7% and 15.9% respectively.²⁵

²³ Refers to the shares of the unemployed who stated their occupation (i.e. the 'not stated/other' category is excluded).

²⁴ Refers to the shares of the unemployed who stated their education (the highest level attained); i.e. the 'not stated/other' category is excluded.

²⁵ Regional profile chapters (c.f. Report pages: 43, 49, 55, 61, 67, 73, 79, 85).

Job seekers registered with the Public Employment Service (PES)

Table 22 presents data on the number of persons registered with the Public Employment Service (PES) who were in receipt of unemployment benefit/allowance (or credits), who were seeking employment, and who were ready to take up employment in May 2015. With regard to the occupational distribution of job seekers across regions, the highest share of jobseekers in each region had previously worked in elementary occupations (ranging from 20% in Dublin to 25% in the South-East region) or in skilled trades (ranging from 16% in Dublin to 20% in the South-West region). Operatives were the third largest group, with their share within regions ranging from 13% in Dublin to 16.5% in the Midland region. Dublin had the highest share of job seekers who previously worked as professionals or associate professionals. Reflecting the size of its labour market, Dublin accounted for one quarter of all job seekers registered with the PES nationally, while the Midland region accounted for only 7%. When compared with the situation a year ago, the number of job seekers declined in each region.

Table 22. Number of job seekers by occupational group and region, May 2015 *

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	271	1,057	349	153	193	303	292	261	2,879
Professionals	853	2,474	811	346	674	810	1,058	906	7,932
Associate professionals	1,568	5,016	1,676	714	1,210	1,659	1,840	1,512	15,195
Administrative & Secretarial	1,923	4,676	2,006	944	1,525	2,138	1,971	1,500	16,683
Skilled Trades	3,629	6,080	2,897	1,865	2,443	4,157	3,955	2,854	27,880
Caring/Leisure	1,559	2,363	1,201	924	1,093	1,859	1,581	1,146	11,726
Sales & Customer Service	1,625	3,585	1,365	967	1,161	1,928	1,742	1,254	13,627
Operatives	2,986	4,935	2,242	1,603	2,239	3,364	2,865	2,185	22,419
Elementary occupations	4,408	7,365	3,052	2,361	3,031	5,378	4,280	3,332	33,207
Other	56	112	45	42	35	51	115	47	503
Total	18,878	37,663	15,644	9,919	13,604	21,647	19,699	14,997	152,051

Source: DSP Client Database; (*relates to the situation at the end of week 1 in June 2015)

Supply from education and training system

In 2014, the total output from the national education and training system amounted to almost 95,000 awards (NFQ 1-10). Dublin accounted for 37% of all national awards (NFQ 1-10). With regard to the field of learning, it accounted for 40% of all awards for science & maths, 36% of ICT awards, and for 35% of awards for engineering & construction. (Table 23a)

The number of higher education awards (NFQ 6-10) made to learners at IoTs and universities in 2014 amounted to approximately 66,500.²⁶ The highest share of these (almost a quarter) were for business & law, a further 17% were for health, 14% for arts & humanities, and 10% for engineering & construction. Dublin accounted for 40% of all higher education awards in the State. Furthermore, it accounted for 44% of

²⁶ In addition to the awards from universities and the institutes of technology, other providers of higher education (e.g. private, independent colleges, run programmes leading to QQI higher education awards spanning levels 6-10 on the NFQ. In 2014, there were over 5,000 major awards in the higher education outside the HEA-aided sector, but these are not included in this report.

business & law awards, 43% of health, 40% of science & maths, and 36% of ICT awards. The Midland region had the highest relative share of business & law awards, at almost a third of its total; in contrast, only 14% of higher education awards in the Mid-East region were in this field. The Border region had the highest share of awards in engineering & construction (15%); in contrast, the Mid-East region had only 2% of its higher education awards in this field. The Mid-East also had the lowest share of ICT awards (4%), whereas the Midland region had the highest (9%). The South-East had the lowest share of its awards in the field of science & maths (3%); the Midland and Mid-West regions also had the relative share of these awards that was lower than the State average. (Table 23c)

Table 23a. Further and higher education and training awards by field of learning and by region, 2014

Field of learning / Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture/vet	404	727	116	257	400	712	429	248	3,293
Arts/humanities	671	4,520	1,114	247	1,328	749	1,940	2,008	12,577
Business & law	2,049	8,038	794	990	1,928	1,853	3,434	1,772	20,858
Education	181	1,832	622	-	1,352	130	467	696	5,280
Eng. & construction	883	3,082	68	396	1,132	885	1,457	931	8,834
General learning	479	1,311	155	422	302	368	291	200	3,528
Health	1,831	7,540	881	1,117	1,666	2,120	3,083	1,530	19,768
ICT	339	1,488	139	188	440	290	795	417	4,096
Science/mathematics	463	2,268	366	123	428	164	1,119	739	5,670
Services	693	1,311	92	318	350	890	1,055	501	5,210
Social sciences/journalism	140	2,615	628	37	466	160	898	815	5,759
Total	8,133	34,732	4,975	4,095	9,792	8,321	14,968	9,857	94,873

Source: QQI (FET major awards), HEA

Table 23b. QQI / FET major awards* by field of learning, by region, 2014

Field of learning / Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture/vet	270	216	116	208	400	544	308	180	2,242
Arts/humanities	319	1,138	192	193	307	476	608	314	3,547
Business & law	1,019	1,100	299	379	474	668	728	491	5,158
Education	*	*	*	*	*	*	31	*	31
Eng. & construction	242	620	-	149	181	309	312	144	1,957
General learning	479	1,189	138	410	302	340	291	182	3,331
Health	1,130	2,747	579	628	731	1,074	1,144	626	8,659
ICT	*	*	*	*	*	*	*	*	*
Science/mathematics	42	72	11	6	17	9	40	-	197
Services	296	474	30	116	134	341	487	185	2,063
Social sciences/journalism	133	394	78	24	97	119	196	118	1,159
Total	3,930	7,950	1,443	2,113	2,643	3,880	4,145	2,240	28,344

*FET data omits cells too small to report, therefore the totals for each region do not add up to the national total.

There were approximately 28,500 major awards made by QQI to FET learners across levels 1-6 on the NFQ in the State. Of these FET/QQI awards presented in the report, the majority, (31%) were for health & welfare (e.g. childcare or healthcare support); almost a fifth were for business & law (e.g. business studies/business administration), 13% were for arts & humanities, and 7% for engineering & construction.²⁷ The Border region had the highest share of awards in business & law, with 26% of all FET awards in the region categorized into this field; in contrast, Dublin, at 14%, had the lowest share of its awards in this field. The Mid-East region had the highest share of awards in health & welfare, with 40% of all FET awards in the region being categorised into this field.

Dublin accounted for 28% of the total FET awards; the South-West accounted for 15%, and the Border and South-East regions each accounted for 14%. Nationally, Dublin accounted for 32% of FET awards in each of the following fields: engineering & construction, arts & humanities, and health; it also accounted for 37% of awards in the field of science & maths. (Table 23b)

Table 23c. Higher education awards by field of learning, by region, 2014

Field of learning / Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture/vet	134	398	*	49	*	168	121	68	938
Arts/humanities	352	3,382	922	54	1,021	273	1,332	1,694	9,030
Business & law	1,030	6,938	495	611	1,454	1,185	2,706	1,281	15,700
Education	181	1,832	622	0	1,352	130	436	696	5,249
Eng. & construction	641	2,462	68	247	951	576	1,145	787	6,877
General learning	*	122	17	12	*	28	*	18	197
Health	701	4,793	302	489	935	1,046	1,939	904	11,109
ICT	339	1,488	139	188	440	290	795	417	4,096
Science/maths	421	2,196	355	117	411	155	1,079	739	5,473
Services	397	837	62	202	216	549	568	316	3,147
Social sciences/journalism	7	2,221	550	13	369	41	702	697	4,600
Total*	4,203	26,782	3,532	1,982	7,149	4,441	10,823	7,617	66,529

Source: SLMRU (SOLAS) analysis of QQI (QQI FET Major Awards) and HEA data

* HEA data omits cells too small to report, therefore the totals for each region do not add up to the national total.

²⁷ FET awards data and statistics presented in this report are a subset of all FET data, this subset being confined to those obtaining QQI awards. Therefore, activities that do not lead directly to certification (e.g. adult literacy), and FET awards by other award bodies (e.g. City & Guilds) are not included. For illustrative purposes, it is estimated that there were 282,000 learners in the FET sector in 2013/14 altogether. Of these, 194,000 were on further education courses, either full-time or part-time; an additional 81,000 were in training where courses can broadly be divided into training for learners under 25 years, training for the unemployed and other training.

It has been recognised that, for young people, there is a rather complex interplay between participating in the labour market and in education and training. Therefore, in addition to the youth unemployment rate discussed within the theme of unemployment, other relevant indicators, such as early school leaving and the level of engagement with the education system as well as the labour market, should be considered.

Notwithstanding continued improvements in retention and graduation rates at secondary level (where the number of students completing Leaving Certificate continue to increase, with the rate of completion exceeding 90%),²⁸ early school leaving (ESL) still remains a concern for policy makers and an issue of relevance for the provision of FET at regional level. In 2014, the ESL rate was above the national average in the Border, Midland, and South-East regions, while Dublin, despite having a relatively low ESL rate, still accounted for almost one quarter of all early school leavers in the State.²⁹

In addition to early school leaving, young people can be disengaged from both education and from the labour market. By identifying all those who are disengaged from the labour market and education or training, a rather heterogeneous group of young people who are neither in employment nor in education and training, referred to as ‘NEET’, is captured.³⁰ This group can potentially join the labour market, and as such, it can be considered a target group for labour market interventions and FET provision.

There remains a sizeable section of young people in each region that are classified as NEET; the highest NEET rate (for those younger than 25) was in the Midland (19%), followed by the Border and South-East regions (17% each), while the lowest rates were in the Mid-West (9%) and Dublin regions (10%). The NEET rates for those aged 24-35 are even higher, exceeding 20% in all regions with the exception of Dublin.

Finally, labour market transition analysis highlighted the fact that re-engagement with the education and training system occurs. The analysis illustrated this to be the case for some who exited the labour market in order to improve their skills. In this regard, the occupations with the highest number of transitions from employment to inactivity due to study were general administrative occupations, sales assistants, child-care workers, waiters, catering assistants, and construction and farm labourers.

²⁸ Department of Education and Skills (2015) *Retention Rates of Pupils in Second Level Schools - 2008 Entry Cohort*. The report found that, off the 2008 entry cohort, 96.9% sat the Junior Certificate Exams in 2011 or 2012 and 90.6% sat the Leaving Certificate Exams in 2013 or 2014.

²⁹ The indicator is defined as the percentage of the population aged 18-24 with at most lower secondary education and who were not in further education or training during the last four weeks preceding the survey. (CSO, QNHS); Eurostat.

³⁰ The indicator on young people neither in employment nor in education and training (NEET) provides information on young people aged 15 to 24 who meet the following two conditions: (a) they are not employed (i.e. they are either unemployed or inactive according to the International Labour Organisation definition) and (b) they have not received any education or training in the four weeks preceding the survey; data are expressed as a percentage of the total population in the same age group and gender, excluding the respondents who have not answered the question 'participation to education and training' (CSO, Ireland, Eurostat). While the main focus is on youth (age group 15-24), it is informative, especially from the perspective of labour market intervention and FET provision, to consider 25-34 age group as well, which is made possible by the CSO Ireland; data presented relate to Q4 2014. The NEET statistics can be seen as complementary to the youth unemployment rate since the latter is heavily influenced by the size of the youth labour market (i.e. for calculating the NEET rate, the denominator is the total population aged 15 to 24, whereas for calculating the unemployment rate only those aged 15-24 in the labour force are considered). Another relevant indicator would be the youth unemployment ratio, which has the same numerator as the youth unemployment rate, but the denominator is the total population aged 15-24 (as is the case with the NEET rate).

2. Border



Population	498,400
Working age (15-64)	310,300
Labour force	206,400
Employment	185,800
Unemployment	20,600
Employment rate	57.4%
Unemployment rate	10.0%
Participation rate	54.0%
GVA per person (€)	19,016
GVA per person (State = 100)	55.4

Employment by sector and type

- In quarter 4 2014, there were 185,800 persons in employment; over 23,000 (12% of all employed in Q4 2014) entered new employment in 2014
- The health and industry sectors were the largest, each accounting for 15% of total employment; the public sector (comprising PAD, health and education) employed 50,500 persons, or 27% of the region's total employment; over 18,000 persons (10%) were employed in knowledge intensive services
- Self-employment amounted to 18% of the total region's employment; almost three quarters of these were self-employed with no employees; 3% were employed in State-sponsored schemes.

Figure 2.1 Employment by broad economic sector (Border), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 2.2 Employment by broad occupation* (Border), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

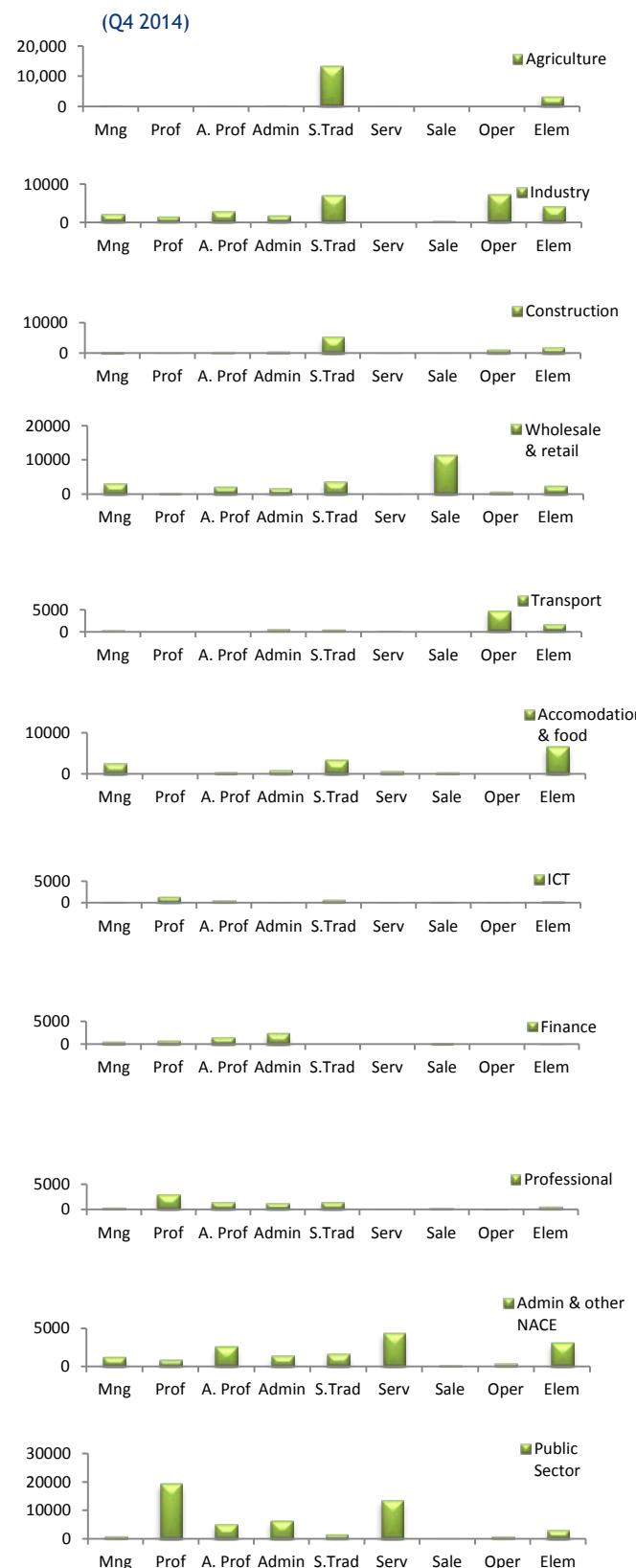
Employment by occupation

- In quarter 4 2014, there were approximately 38,000 persons employed in skilled trades occupation, accounting for almost one fifth of total employment in the Border region; within this broad occupation, farmers accounted for one third
- Almost 27,000 persons were employed in professional occupations, while 26,500 were employed in elementary occupations
- One-in-ten were employed in caring, leisure and related occupations; this broad occupation expanded strongly in relative terms, by 22%, (y-o-y)
- There were 17,000 persons employed in associate professional and technical occupations, while an identical number were in administrative occupations.



Border

Figure 2.3 Employment by economic sector and occupation (Border),

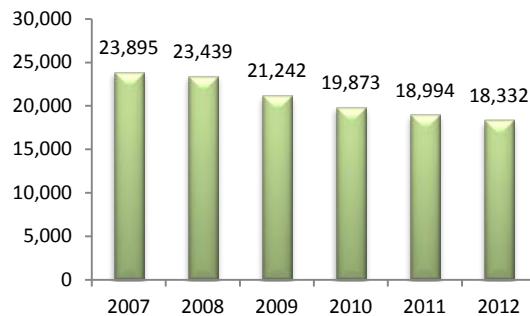


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, managers comprised about a fifth of employment in industry and in hospitality (proprietors) and just over a quarter in wholesale & retail
- The overwhelming majority (71%) of professionals worked in the public sector (PAD, health and education combined); the public sector also employed the largest share of associate professionals (30%), followed by industry (17%)
- 35% of those employed in skilled trades were working in agriculture, consistent with the finding that farmers accounted for one third of the total; within industry, skilled trades comprised the largest occupational grouping in manufacturing, especially in low technology segments
- Almost one half of operatives were employed in industry and one third in transport
- Those with relatively low skills (elementary occupations) were most likely to be employed in accommodation & food services (almost 1/4 were employed in this sector), about one-in-six were employed in industry, while one-in-eight worked in agriculture and in the public sector
- Within occupational groups, the highest employment was in the following occupations:
 - Managers: functional managers, managers and directors in wholesale and retail, and hotel and accommodation managers and proprietors
 - Professionals: nurses & midwives, education teaching professionals (secondary, primary and further & higher education)
 - Associate professionals: business sales executives
 - Administrative and secretarial: government clerks, finance administrative occupations (e.g. book-keepers, payroll and wages and bank clerks, and generic administrative occupations)
 - Skilled trades: farmers, fitters (metal working production & maintenance), mechanics, and carpenters & joiners
 - Caring and services occupations: care workers, nursing assistants, child-minders
 - Sales: sales and retail assistants
 - Operatives: drivers, assemblers and routine operatives, food processing operatives
 - Elementary: catering, bar and waiting staff, elementary storage occupations, cleaners.

Figure 2.4 Active enterprises: Business Economy (Border)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output (GVA), 2012

- GVA per person: €19,016
- GVA index (State =100): 55.4
- GVA (share, % of State's total): 6.2

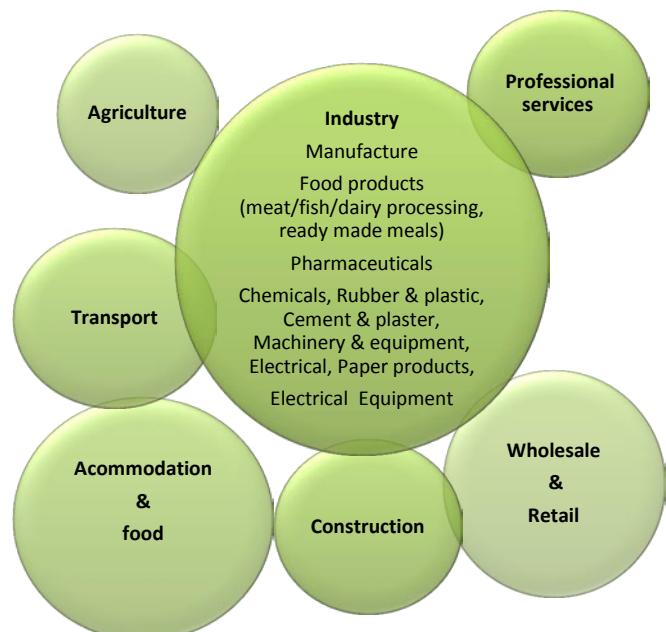
Active enterprises

- In 2012, there were approximately 18,300 active enterprises in the private business economy in the Border region - a 3.5% decline compared to 2011
- Between 2007 and 2012, the number of active enterprises declined by about 5,500 or 23% - the largest decline (in both absolute and relative terms) compared to all other regions
- Wholesale and retail had the largest number of enterprises (4,900), followed by construction (3,900); these sectors accounted for 27% and 21% of the total respectively
- Approximately 90% of active enterprises in the Border region were micro enterprises; only 0.1% were large enterprises (with 250 or more persons engaged).

Medium to large enterprises by sector

- Outside the public sector, the highest number of medium to large enterprises (with 50 or more persons engaged) in the Border region in 2014 was found in industry, wholesale & retail, and accommodation & food services
- Within industry, there were a number of medium to large enterprises engaged in the manufacture of food products, pharmaceuticals, paper & paper products, chemicals, electrical equipment and construction materials.

Figure 2.5 Sectors with largest enterprises (Border), 2014



Source: Analysis by SOLAS (SLMRU) based on DataIreland data



Border

Figure 2.6a Industrial units (Border)

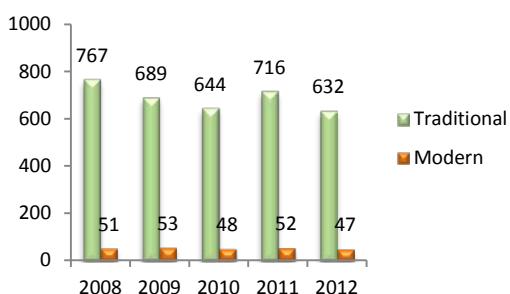
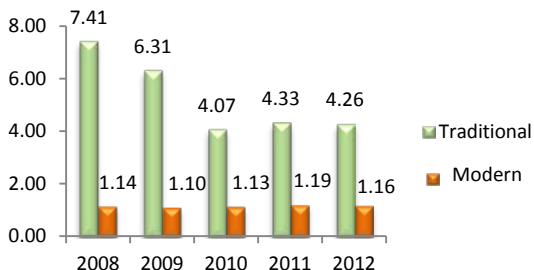


Figure 2.6b Gross output in industrial units (Border),
(& billion)



Source: Analysis by SOLAS (SLMRU) based on CSO data

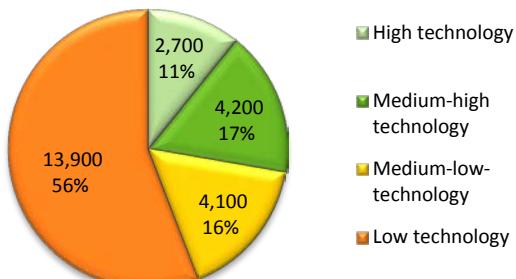
Industrial activity in the Border region

- In 2012, 93% of all industrial units were in the traditional sector; over the period 2011 - 2012, the number of units decreased in both sectors; the number of persons engaged declined in the traditional and remained unchanged in the modern sector;
- Over the period 2008-2012, the number of industrial units declined by 18% in the traditional sector and by 8% in the modern sector; the number of persons engaged in industry declined, due to the contraction of the traditional sector
- Over the period 2011-2012, the value of gross output decreased marginally in both sectors; while only 7% of units were in the modern sector, their contribution to the regional gross industrial output amounted to 21%; this was the lowest share of all regions
- In 2012, approximately 14,400 persons were engaged in the Irish owned industrial units, while 6,200 were in the foreign owned units; the latter accounted for 35% of the gross output, the lowest share across all regions; the Border also had the lowest average wage per person engaged in industry in 2012
- Approximately four fifths of persons were engaged in SMEs, and SMEs accounted for four fifths of industrial output
- In 2012, the share of industrial output exported was 55.6%, the second lowest across the regions; within manufacturing activities, there were 16,500 persons in exporting units, while 4,000 were in non-exporting units; when compared with 2009, the numbers engaged declined in the former, by 2,000 persons, and marginally increased in the latter.

Manufacturing employment

- In quarter 4 2014, there were 25,000 persons employed in manufacturing in the region
- Approximately 14,000 were employed in low-tech manufacturing, mostly in the food and beverage segment (which alone accounted for 40% of total manufacturing employment)
- Medium-low tech (mostly fabricated metal products) and medium-high tech (mostly machinery and equipment) manufacturing accounted for 17% and 16% respectively; high tech manufacturing (pharmaceuticals and electronics) accounted for 11%
- The Border, together with the Midland region, had the lowest share of its manufacturing employment in the high tech segment; it also had the highest share of low technology manufacturing.

Figure 2.7 Manufacturing employment (Border), Q4 2014

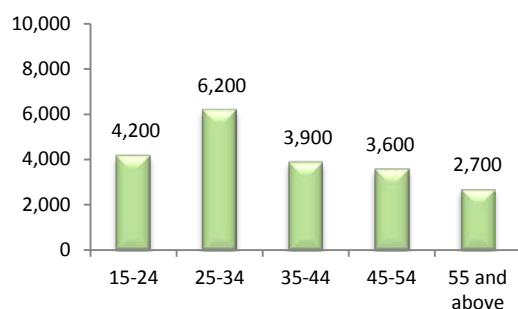


Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

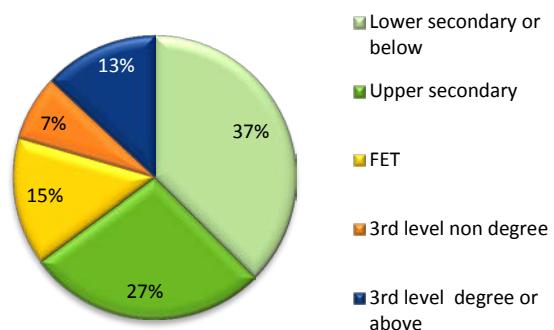
- In quarter 4 2014, there were approximately 20,600 unemployed persons in the Border region, almost 8,500 fewer than a year ago; 63% of those unemployed in the region were long term unemployed (the long term unemployment rate was 6%); one third became unemployed during 2014; more than a fifth have never been in employment
- Age: those aged 25-34 accounted for 30% of all unemployed; about one fifth of all unemployed were younger than 25; at 22.5%, the youth unemployment rate was higher than the rate for the State (20.3%)
- Education: over a third of those unemployed in the region had attained at most lower secondary education; 15% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship; one fifth had a third level qualification
- Sector: 15% of all unemployed persons had previously been employed in construction, 12% in wholesale and retail, and 10 % in industry
- Occupation: the majority of unemployed persons (with previous occupation) were previously employed in skilled trades (30%), followed by elementary occupations (20%).

Figure 2.8 Unemployment by age (Border), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 2.9 Unemployment: share by education* (Border), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 2.10a PES job seekers (Border), May 2015

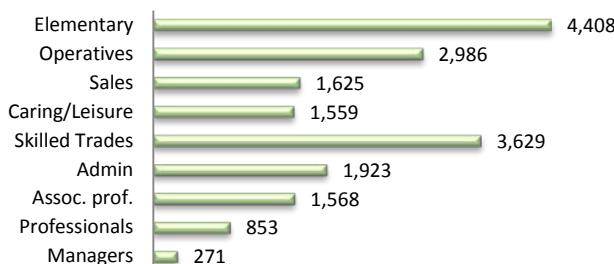
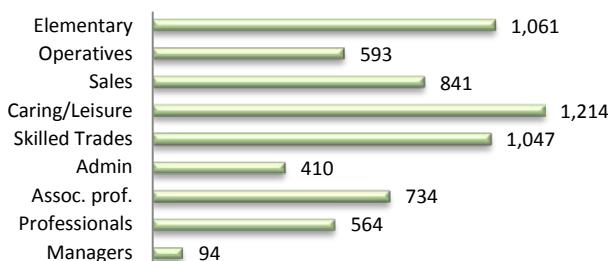


Figure 2.10b PES vacancies (Border), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

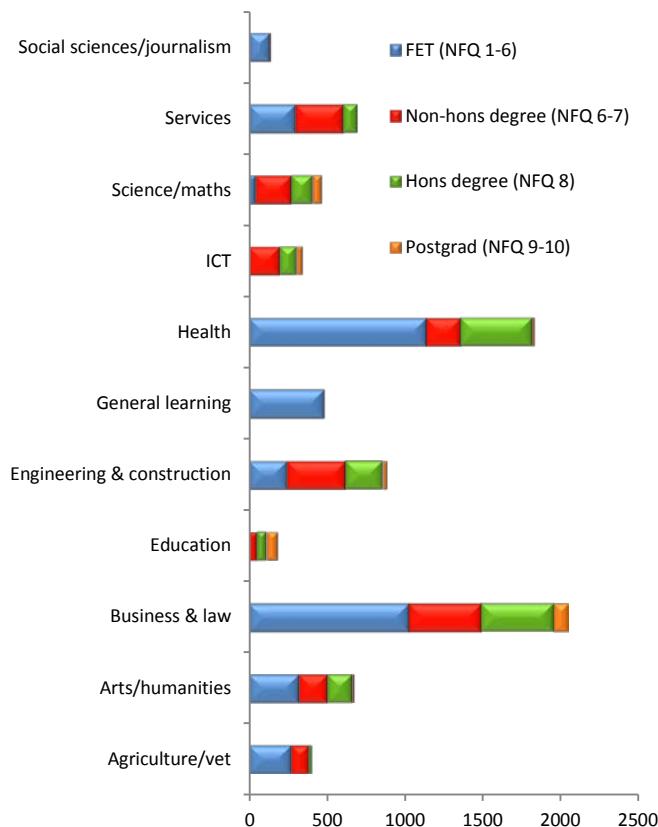
Live Register, PES job seekers and vacancies

- In May 2015, there were 49,200 persons on the Live Register in the Border region (a y-o-y decline of 11%); of these, 14% were younger than 25 years of age and 60% were male
- In May 2015, approximately 19,000 job seekers were registered with the PES; the highest share (23%) had previously worked in elementary occupations (process plant and construction occupations), almost one fifth in skilled trades, and 16% as operatives
- In 2014, over 6,500 vacancies were advertised through DSP Jobs Ireland in the Border region; the highest number of vacancies was in caring (care workers), skilled trades (mainly chefs), and elementary occupations (e.g. catering staff, cleaners, security guards), followed by sales (collector salespersons, sales assistants) and associate professional and technical occupations (business sales executives, vocational trainers).

Employment growth and job creation

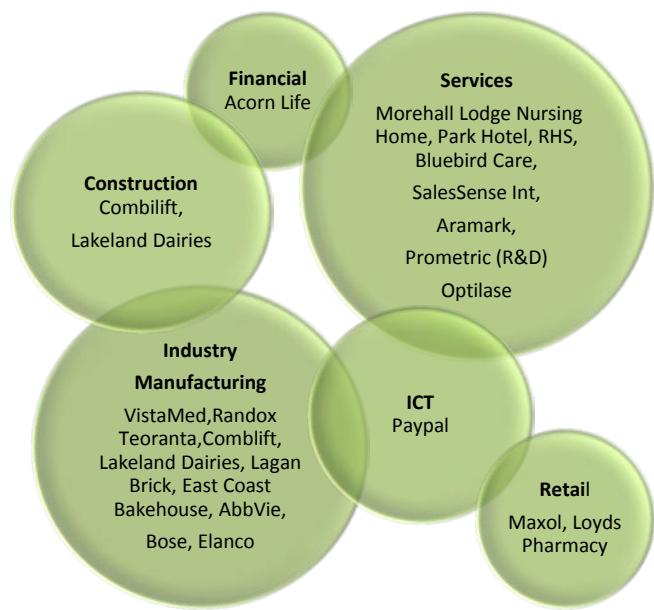
- Over the period quarter 4 2013 to quarter 4 2014, employment remained static overall; however, employment expanded in industry, health, and accommodation and food services, while it declined in wholesale and retail, and, to a lesser extent, in ICT and construction
- Employment in the public sector expanded due to the increase in health; it remained static in both PAD and in education; it also remained static in professional, financial and administrative services, as well as in agriculture
- Job announcements for the Border region suggest that job opportunities in the short to medium term are set to arise primarily in industry, namely in high tech (e.g. MedTech and Biopharma), medium-high tech (Combilift) and low-tech manufacturing (e.g. Lakeland diaries); job creation in construction will continue to be associated with industrial expansion; finally a number of ICT jobs are anticipated mostly in sales and CRM support roles (e.g. SalesSense).

Figure 2.12 FET and higher education awards (Border), 2014



Source: QQI (FET major awards), HEA

Figure 2.11 Job creation announcements (Border), 2014 & 2015



Source: Analysis by SOLAS (SLMRU), various sources

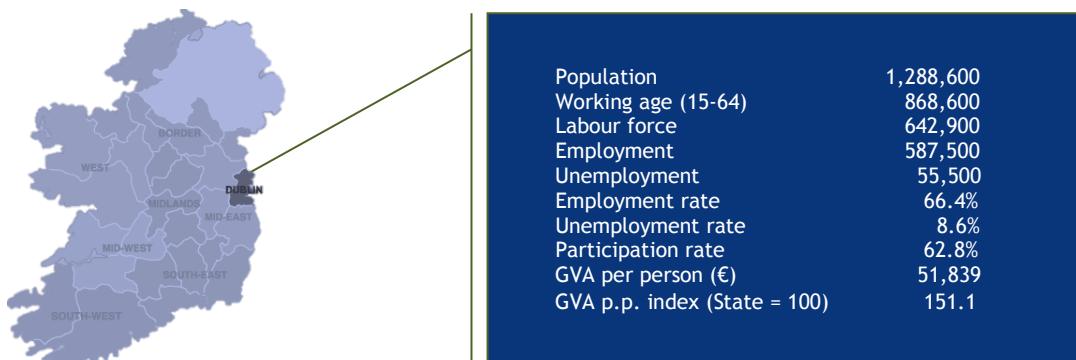
Education and training awards, 2014 (Border)

- Of the total of approximately 8,100 awards, the largest numbers were in business & law and health
- Of almost 4,000 FET awards (NFQ 1-6), most were in health and business & law, with over 1,000 awards in each field; awards in health comprised 29% of all FET awards in the region, while business & law accounted for 26% of all FET awards in the region
- Higher education awards at undergraduate level (totalling approximately 4,200) were mostly in business & law, health, and engineering & construction, accounting for 25%, 17%, and 15% respectively; 10% of higher education awards were in science & maths, and 8% were in ICT; the combined share of science & maths and ICT awards, of 18%, was the highest of all regions
- Regarding postgraduate awards, about a third were in business & law

Early school leavers from education and training: in quarter 4 2014, the ESL rate was 11.3 % - which was above the rate of 6.5% for the State.

NEET: There were approximately 9,500 young people neither in employment nor in education and training, translating into the NEET (15-24) rate of 17.4%, above the rate for the State.

3. Dublin



Employment by sector and type

- In quarter 4 2014, there were 587,500 persons in employment in the Dublin region; almost 100,000 entered (new) employment during 2014
- The wholesale and retail sector was the largest, employing 81,300
- Approximately 44,200 persons were in the ICT sector, representing 8% of the region's employment, while there were approximately 55,600 persons in financial services and related activities
- Knowledge intensive services (market, high tech and financial) accounted for 26% of employment, the highest share of all regions
- 13% were self-employed, of which two thirds with no employees; 1.6% were in State subsidised employment schemes.

Figure 3.2 Employment by broad occupation* (Dublin), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

Figure 3.1 Employment by broad economic sector (Dublin), Q4 2014

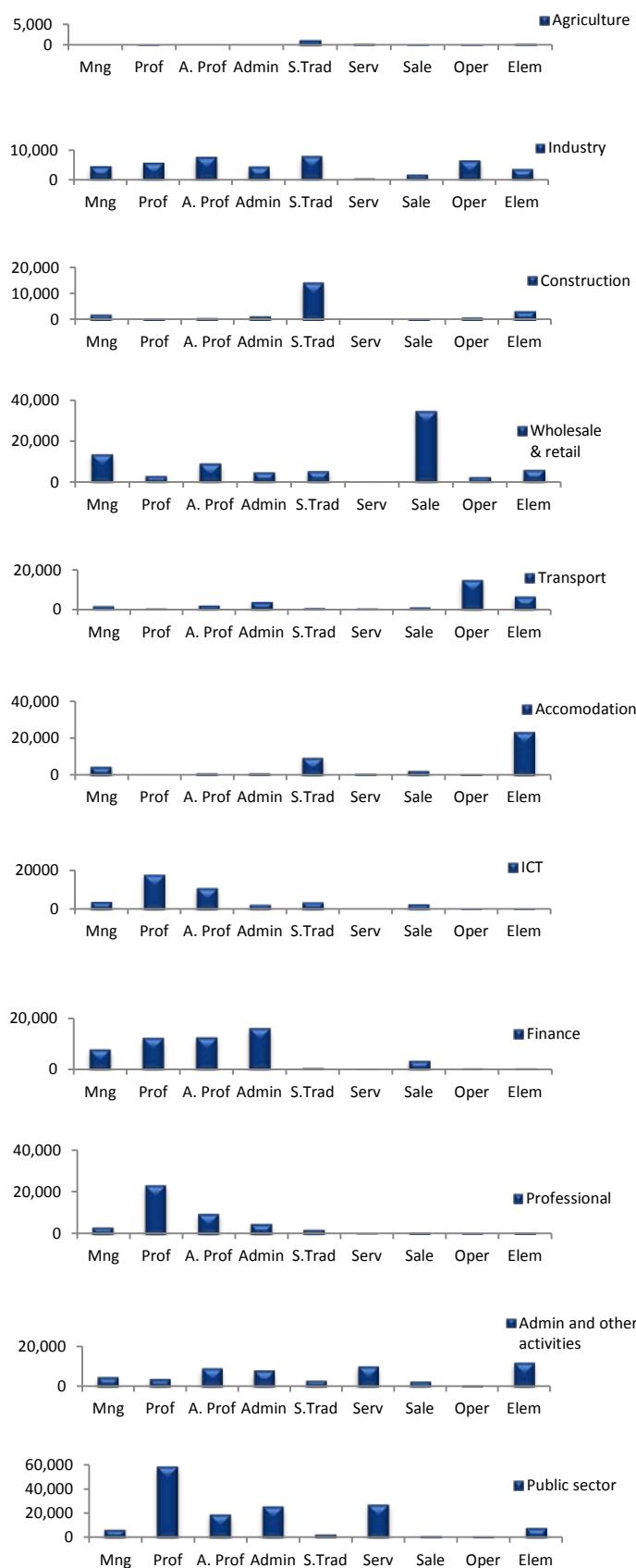


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation

- There were approximately 56,700 managers, directors and senior officials working in the Dublin region in quarter 4 2014, amounting to 10% of employment
- Over 128,000 were employed in professional occupations, accounting for 22% of the region's total employment - the highest share of all regions; there were almost 84,500 employed in associate professional and technical occupations, accounting for 14% of total employment
- Approximately 63,300 persons were employed in elementary occupations while 30,000 worked as operatives
- Almost 42,000 worked in caring, leisure and other personal services occupations, while 51,300 worked in skilled trades.

Figure 3.3 Employment by occupation and sector (Dublin, 000s),
Q4 2014

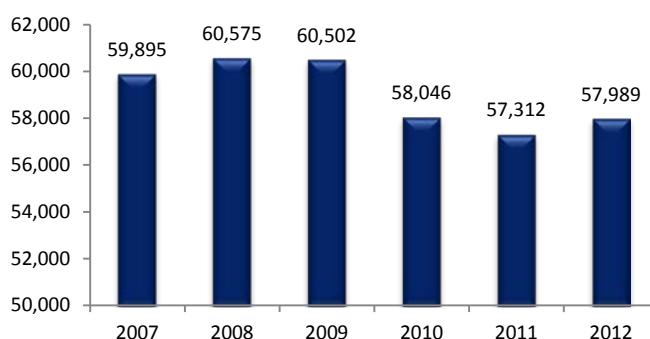


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, 46% of professionals were employed in the public sector (comprising health, education, and public administration and defence); associate professionals were also most likely to be employed in this sector, with 23% of them being employed there, while 15% of them were working in financial services
- 14% of professionals worked in the ICT sector and 10% were in financial services and related activities
- One quarter of managers & directors were employed in wholesale and retail, while 14% of them were working in financial services
- Construction provided employment for more than a quarter of all working in skilled trades, while 16% of them were working in industry, and 15% in accommodation & food services
- One half of operatives were employed in transport, while 22% of them were in industry
- Of those employed in relatively low skilled occupations (i.e. elementary), 35% were in accommodation & food services, while 10% were in wholesale & retail
- Within occupational groups, the highest employment was found in the following occupations:
 - Managers: production, functional, financial, and managers in retail & wholesale
 - Professionals: IT professionals (programmers and software developers, IT project and specialist managers) teachers, nurses & midwives, medical practitioners, accountants, business & data analysts, and solicitors
 - Associate professionals: business sales executives, sales financial account managers, IT technicians, finance and investment analysts / advisers, financial accounts managers, police officers
 - Admin/secretarial: Government clerks, book-keeping, wages, bank & post office clerks, receptionists, PAs & other secretaries
 - Skilled trades: chefs, metal working production & maintenance fitters, electricians, mechanics, carpenters & joiners, IT service trades
 - Services: care workers, nursing assistants, child-minders, hairdressers
 - Sale & customer services: sales and retail assistants, customer support, customer service supervisors
 - Operatives: taxi drivers, truck/van drivers
 - Elementary: storage, cleaners, catering & waiting staff.

Figure 3.4 Active enterprises: Business Economy (Dublin)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output, Gross Value Added, 2012

- GVA per person: €51,839
- GVA index (State =100): 151.1
- GVA (share, % of State's total): 41.9

Active enterprises

- In 2012, there were almost 58,000 active enterprises in Dublin, accounting for 31% of the State's total number
- Between 2011 and 2012, the number of active enterprises increased by 1.2%; Dublin was the only region to record a year-on-year increase; despite this, the number remain almost 2,600 below the peak number recorded in 2008
- The largest number of active enterprises were in professional activities (13,100, or almost a quarter), followed by wholesale and retail (just over 11,000 or almost a fifth); one-in-ten enterprises were in the ICT sector, the highest share of all regions
- When compared to other regions, Dublin had the highest share of medium and large enterprises, and consequently the lowest share of micro enterprises.

Medium to large enterprises by sector

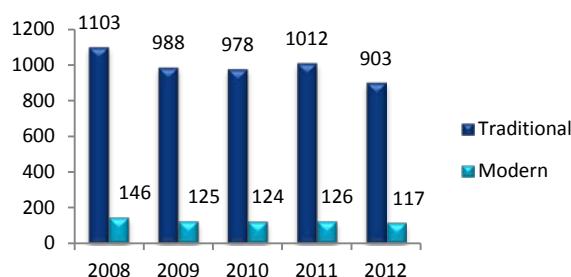
- The highest number of medium to large enterprises (employing at least 50 persons) in the Dublin region in 2014 was found in wholesale & retail, industry, ICT, and professional services activities
- Within industry, the largest enterprises were in printing and reproduction of recorded media, manufacturing of computer, electronic and optical products, food, pharmaceuticals, chemicals, and electrical equipment
- Within ICT, the largest companies were in software publishing, computer programming & consultancy, and data processing & hosting activities
- Within professional services, the largest companies were in accounting & tax consultancy, financial services, legal services and insurance.

Figure 3.5 Sectors with largest enterprises (Dublin), 2014



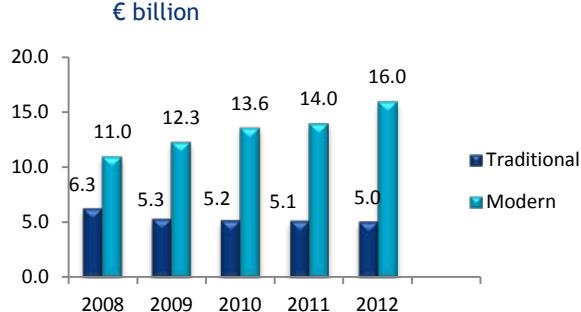
Source: Analysis by SOLAS (SLMRU) based on DataIreland data

Figure 3.6a Industrial units (Dublin)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 3.6b Gross output in industrial units (Dublin), € billion



Source: Analysis by SOLAS (SLMRU) based on CSO data

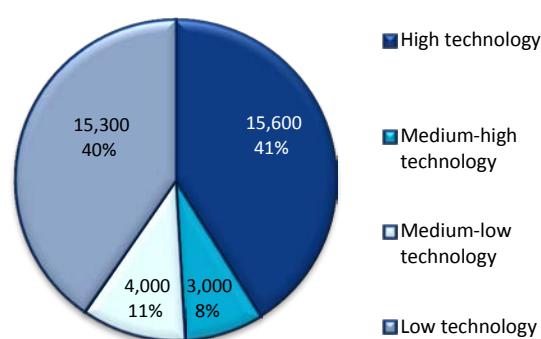
Industrial activity

- In 2012, Dublin had 1,020 industrial units, 89% in the traditional segment; the modern sector accounted for 35% of all persons engaged in industrial activities and for 3/4 of the value of region's gross output in 2012; the value of output in the modern sector increased from €14 billion in 2011 to €16 billion in 2012; it marginally declined in the traditional segment
- Over the period 2011-2012, the number of industrial units decreased, a reversal of the situation observed for the period 2010 to 2011; the number of persons engaged increased by 1,500 - the modern sector expanded by 3,200, while the traditional sector contracted by 1,700
- Over the period 2008-2012, the number of industrial units declined by almost a 1/5; the number of persons engaged in industrial activities declined overall (by 7,600) due to the decline in the traditional sector; the modern sector expanded slightly
- In 2012, approximately 17,500 persons were engaged in the Irish owned industrial units, and 15,000 in foreign owned units; the latter accounted for 86% of the gross industrial output; approximately 19,400 persons (or 60%) were engaged in industrial units classified as SMEs; SMEs accounted for 40% of the region's industrial gross output
- Within manufacturing alone, in 2012, those working in exporting units outnumbered those in non-exporting - the former amounted to approximately 21,900 persons, the latter to approximately 10,500; like in all other regions, the number of persons engaged in exporting units declined in relation to 2009; however, together with the Border region, Dublin was the only region to report an increase in the number of persons engaged in non-exporting units.

Manufacturing employment

- In quarter 4 2014, there were approximately 38,000 persons in the Dublin region employed in manufacturing
- 41% were employed in high technology manufacturing and almost an identical share (40%) were employed in low technology manufacturing; there were 8% in medium-high and 11% in medium-low manufacturing
- Dublin had the highest share of high technology manufacturing of all regions; it also accounted for about one quarter of all high technology manufacturing employment in the State.

Figure 3.7 Manufacturing employment (Dublin), Q4 2014

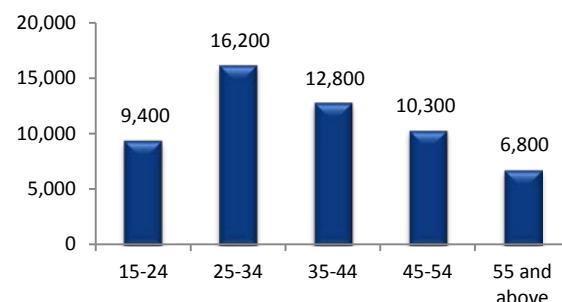


Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

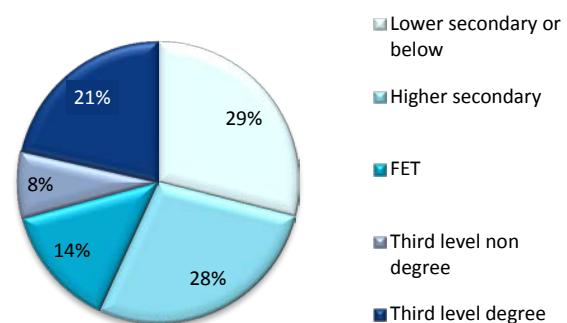
- In quarter 4 2014, there were 55,500 unemployed persons in the Dublin region (7,700 fewer than a year ago); 58% were long term unemployed (the long term unemployment rate was 4.8%); 39% became unemployed during 2014; a fifth have never been in employment
- Age: 29% those unemployed were aged 25-34, while those aged 15-24 accounted for 17%; the youth unemployment rate was 16%, the second lowest of all regions
- Education: 29% of the unemployed had attained at most lower secondary education, 28% attained higher secondary, while 14% held FET qualifications; 29% held some third level; those with a degree or above comprised 21% of unemployed
- Sector: the largest share had previously worked in construction and wholesale & retail, followed by the public sector (with the health sector accounting for a half) and accommodation and food services
- Occupation: while, like in other regions, the majority of unemployed persons had previously been employed in skilled trades and elementary occupations (each accounting for almost a fifth of unemployed with previous occupation), Dublin had relatively high a share of those who had previously worked in associate professional occupations.

Figure 3.8 Unemployment by age (Dublin), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 3.9 Unemployment by education* (Dublin), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 3.10a PES job seekers (Dublin), May 2015

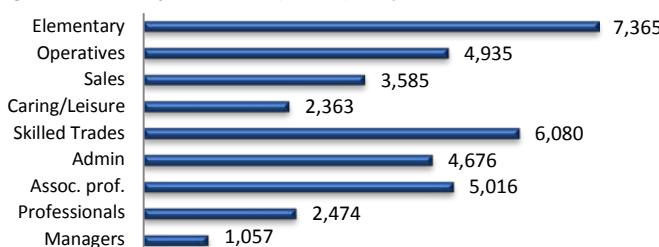
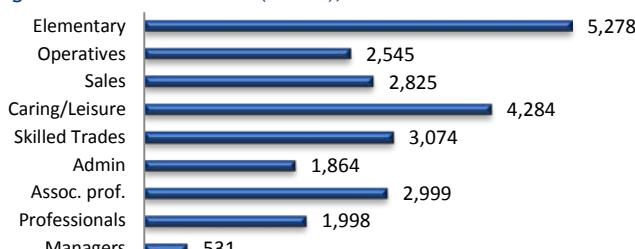


Figure 3.10b PES vacancies (Dublin), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

Live Register, PES job seekers and vacancies

- In May 2015, there were 83,500 persons on the Live Register in the Dublin region (a decline of 12% year-on-year); 14% were under 25 years and 62.5% were male
- In May 2015, 37,700 job seekers were registered with the PES, which was 9% less y-o-y; the highest share (22%) had previously worked as labourers (construction, plant, storage), 19% in skilled trades, 15% as operatives (process, transport), 14% were in associate professional, 13% in administrative, and 10% in sales occupations
- In 2014, at over 25,000 vacancies, the Dublin region accounted for over a third of all vacancies advertised through DSP Jobs Ireland; the highest number of vacancies was in elementary (e.g. catering staff, cleaners, security guards and general operatives) and caring occupations (care workers), followed by skilled trades (chefs, electricians, carpenters), associate professional and technical occupations (business sales executives, IT technicians) and sales (collector salespersons, sales assistants).

Employment growth and job creation

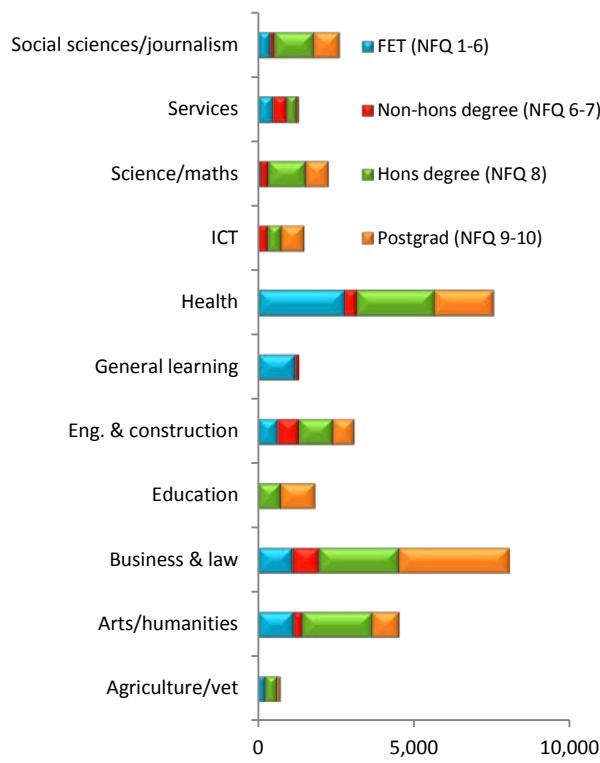
- Over the period quarter 4 2013 to quarter 4 2014, employment expanded by almost 3%
- Financial services, construction, wholesale & retail, and education expanded relatively strongly; employment remained static in PAD, health, transport, industry and ICT; it declined slightly in professional and accommodation & food services
- Recent job announcements suggest that job opportunities will continue to arise in the ICT sector, in industry (MedTech, Biopharma, etc.), in a range of services (including professional services as well as transport), in wholesale & retail, in construction (associated with office building & completions), and in finance; opportunities will also include openings for a range of customer service/support roles across the above sectors.

Figure 3.11 Job creation announcements (Dublin), 2014 & 2015



Source: Analysis by SOLAS (SLMRU) based on various sources

Figure 3.12 FET and higher education awards (Dublin), 2014



Source: QQI (FET major awards), HEA

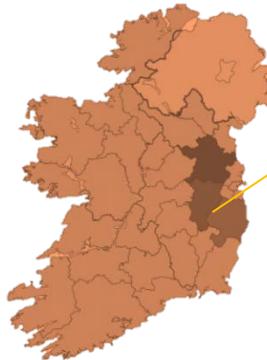
Education and training awards, 2014 (Dublin)

- Of the total of 34,700 awards, the largest numbers were in health and business & law
- Of almost 8,000 FET awards (NFQ 1-6), the largest numbers were in health (35% all FET awards in the region), followed by general learning(15%), and arts & humanities, and business & law (at 14% each)
- Of almost 26,800 higher education awards, 26% were in business & law, 18% in health, 13% in arts & humanities, 9% in engineering & construction, 8% in science & maths, and 6% in ICT; at undergraduate (NFQ 6-8) level, totalling approximately 16,200 awards, the highest numbers were in business & law, health, and humanities & arts
- Postgraduate awards totalled 10,600; the highest numbers were in business & law and health; the number of ICT postgraduate awards marginally exceeded the number of awards at undergraduate level.

Early leavers from education and training (ESL): in quarter 4 2014 the ESL rate was 5.5%, below the rate for the State.

NEET: Youth (age 15-24) neither in employment nor in education and training (NEET) rate was 10.3%, the second lowest in the State.

4. Mid-East



Population	552,900
Working age (15-64)	357,500
Labour force	259,900
Employment	237,900
Unemployment	22,000
Employment rate	65.1%
Unemployment rate	8.5%
Participation rate	62.6%
GVA per person (€)	22,863
GVA p.p. index (State = 100)	66.6

Employment by sector and type

- In quarter 4 2014, there were just below 238,000 in employment in the region; 29,000 entered (new) employment in 2014
- Wholesale & retail was the largest sector of employment , followed by industry; the public sector accounted for a quarter of the total employment in the Mid-East region
- Knowledge intensive services (market, high tech and financial) accounted for 16.5%; there were just over 9,000 persons, or 4%, in ICT
- 1.8% were in State subsidised employment schemes; 15% were self-employed, of which 72% were self-employed without employees.

Figure 4.1 Employment by economic sector (Mid-East), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 4.2 Employment by broad occupation* (Mid-East), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

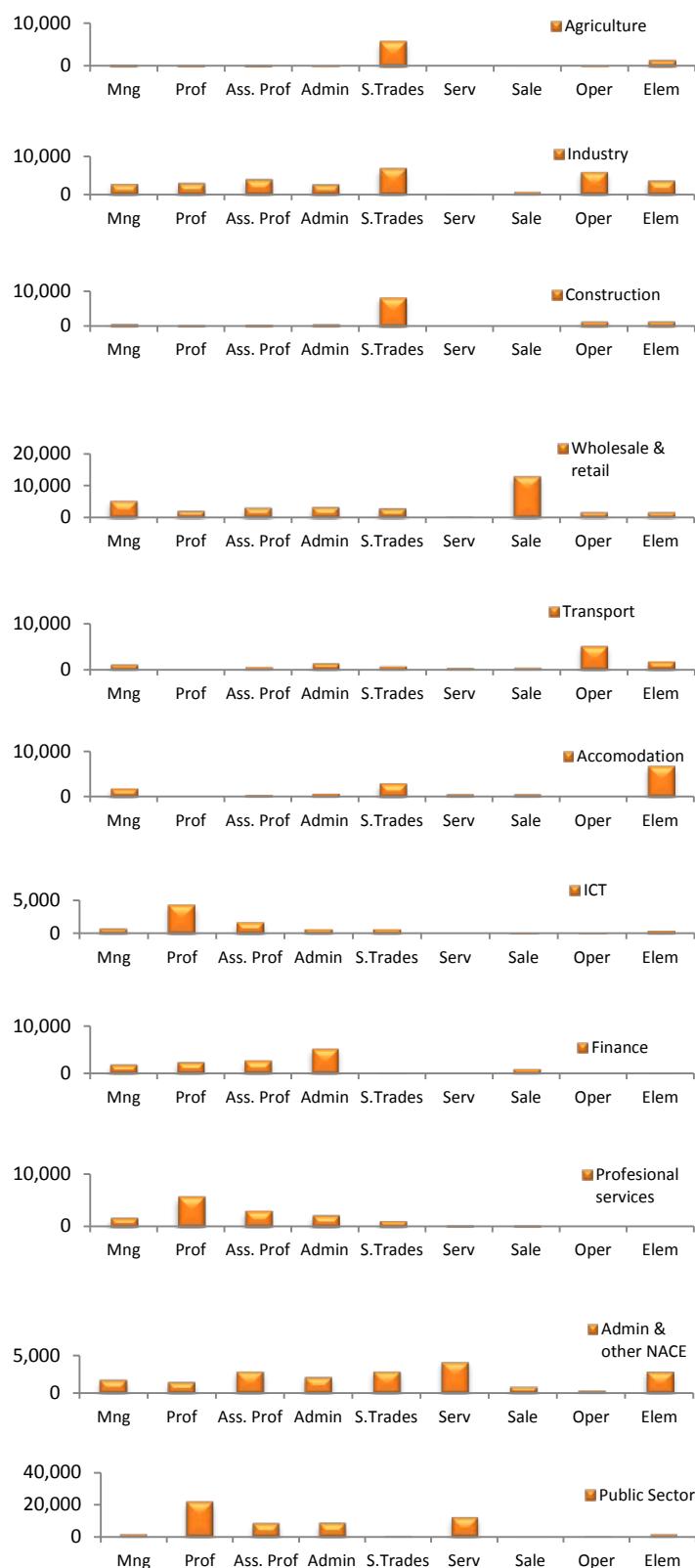
Employment by occupation

- Professionals were the largest occupational group, totalling almost 42,000 persons, followed by skilled trades and associate & technical occupations, amounting to approximately 34,400 and 32,500 respectively
- There were approximately 20,000 managers, directors and senior officials working in the region in quarter 4 2014, and an almost identical number were employed in sales and customer services occupations
- Approximately 17,500 persons worked as operatives, and an almost identical number were employed in caring, leisure and other personal services occupations.



Mid-East

Figure 4.3 Employment by occupation and sector (Mid-East) (000s), Q4 2014

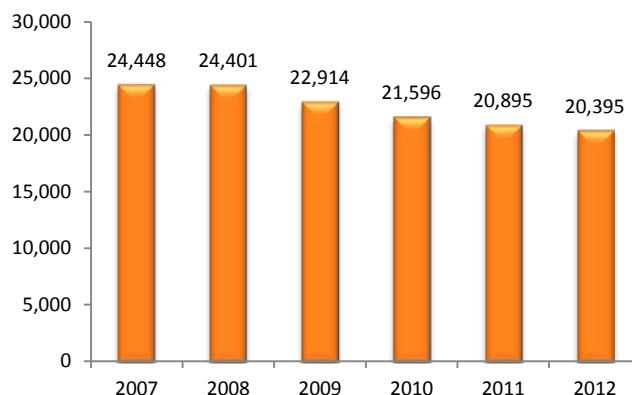


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, 23% of managers & directors were employed in wholesale & retail, 18% were employed in industry, and 12% in the public sector (comprising health, education, and PAD)
- 55% of all professionals in the region were employed in the public sector, amounting to almost one half of the total employment in the sector; 15% were employed in professional services, comprising 40% of the sector's total; 11% were employed in industry
- Associate professionals were also most likely to be employed in the public sector, with 29% of this occupational group working there; 14% of them were in industry, and 11% in ICT
- Approximately one quarter of all employed in administrative occupations were in the public sector and one fifth were in financial services
- 28% of skilled trades were based in construction, 18% in agriculture (farmers), and 16% in industry
- almost three-in-ten of all employed in caring & personnel services occupations were in the public sector
- 39% of operatives were employed in industry, 34% in transport, and 11% in construction
- 29% of persons employed in elementary occupations were in accommodation & food services, accounting for almost one half of the total employment in the sector
- Within occupational groups, the highest employment was found in the following occupations:
 - Managers: functional managers & directors
 - Professionals: teachers (secondary & primary), nurses & midwives, IT professionals, accountants
 - Associate professionals: business sales executives, sales accounts managers, police officers
 - Admin/secretarial: book-keepers, payroll managers and wages clerks, PAs & other secretaries, and generic admin occupations
 - Skilled trades: farmers, carpenters & joiners
 - Services: care workers, hairdressers, barbers, beauticians & related occupations
 - Sales: retail sales assistants, cashiers and checkout operators
 - Operatives: drivers (taxi & cab, truck drivers)
 - Elementary: kitchen & catering assistants, waiting staff, construction workers, cleaners & domestics.

Figure 4.4 Active enterprises: Business Economy (Mid-East)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output (Gross Value Added, 2012)

- GVA per person: €22,863;
- GVA index (State = 100): 66.6
- GVA (share, % of State's total): 7.7

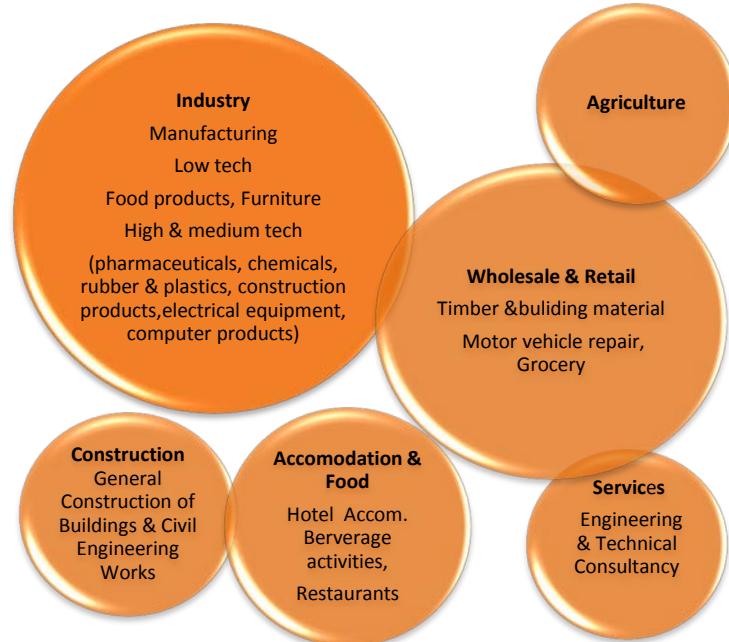
Medium to large enterprises by sector (2014)

- Outside the public sector, the highest number of medium to large enterprises (employing 50 persons or more) in the Mid-East region in 2014 was found in industry, followed by wholesale & retail, accommodation & food services, and agriculture
- Within industry, the largest companies were in manufacturing, particularly in food processing, electrical equipment, chemicals, plastics, and furniture
- Within wholesale & retail the largest companies were in general retail
- Within accommodation & food services, hotels were the largest employers
- Within agriculture, the largest companies were in non-perennial crops and equine
- Civil engineering companies were the largest enterprises in construction activities.

Active enterprises

- In 2012, there were almost 20,400 active enterprises in the Mid-East region; this was a decline of 2.4% compared to 2011
- Compared to the 2007 level, the number of active enterprises declined by 16.6%, or just over 4,000
- Wholesale and retail and construction had the largest share of active enterprises, at 22% and 21% respectively; there were approximately 7,300 enterprises in professionals services (or 16% of the total)
- There were 1,150 enterprises (6% of the total) in the ICT sector; after Dublin, this was the highest share of enterprises in this sector
- Less than 1% of active enterprises were medium sized (with 50-249 persons engaged); 92.5% were micro enterprises (less than 10 persons engaged).

Figure 4.5 Sectors with largest enterprises (Mid-East), 2014



Source: Analysis by SOLAS (SLMRU) based on Datalreland data

Figure 4.6a Industrial units (Mid-East)

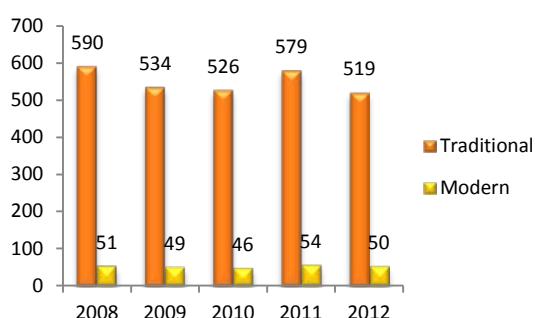
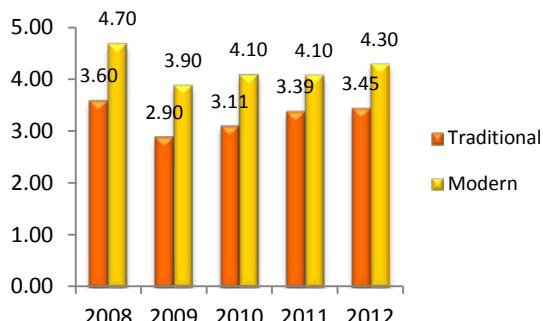


Figure 4.6b Gross output in industrial units (Mid-East), € billion



Source: Analysis by SOLAS (SLMRU) based on CSO data

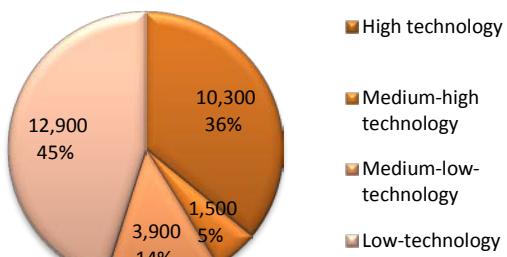
Industrial activity

- In 2012, 91% of all industrial units in the Mid-East region were in the traditional sector, accounting for 62% of all persons engaged
- Over the period 2011-2012, the number of industrial units decreased from 633 to 569; the number of units declined in both sectors (modern and traditional); the value of gross output increased year-on-year, with increases observed in both sectors; the modern sector produced 55.5% of the gross industrial output value in 2012
- Over the period 2008-2012, the number of persons engaged declined by approximately 4,800 or by one fifth, with both traditional and modern segments contracting by similar magnitude
- In 2012, there were 10,200 persons engaged in SMEs, amounting to 52%; SMEs accounted for 40% of the output
- In 2012, there were approximately 9,800 persons engaged in foreign owned industrial units, the identical number as in the Irish owned; however, the value of gross output produced in foreign units was €5,553 million (or 72%), compared to €2,204 million produced in the Irish owned units;
- Three quarters of gross output in 2012 was exported.
- Within manufacturing alone, in 2012, those working in exporting units outnumbered those in non-exporting - the former amounted to approximately 15,500 persons, the latter to approximately 4,100; the number of persons engaged declined in relation to 2009 in both exporting and non-exporting units.

Manufacturing employment

- In quarter 4 2014, 28,600 persons in the Mid-East region were employed in manufacturing
- 36% were employed in the high tech segment, which was above the national average
- Almost a further 13,000 persons or 45% were employed in low-tech manufacturing (mostly in food processing, printing, and furniture) which was also above the national average
- Combined, almost a further one fifth were employed in medium-low tech manufacturing (e.g. rubber& plastic products) and medium-high tech manufacturing (e.g. fabricated metal products).

Figure 4.7 Manufacturing employment (Mid-East), Q4 2014

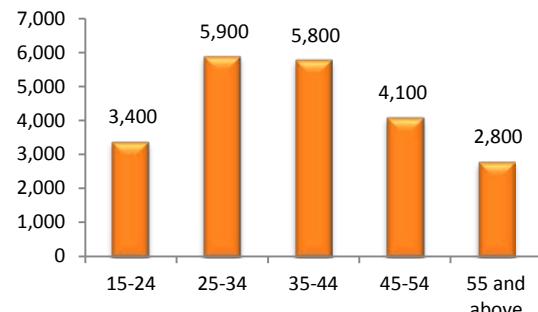


Source: Analysis by SOLAS(SLMRU) based on CSO data

Unemployment

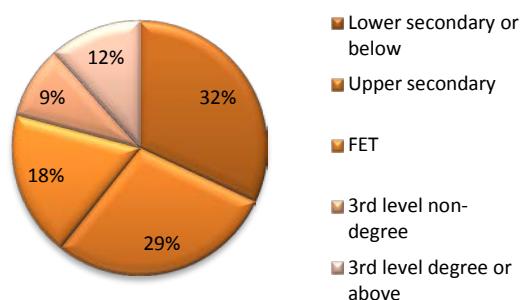
- In quarter 4 2014, there were 22,000 unemployed persons in the Mid-East region; of those, 27% were aged 25-34 and 26% aged 35-44; 56% were long-term unemployed (the long term unemployment rate was 4.7%); 42% became unemployed during 2014; 17% have never been in employment
- Age: those aged under 25 comprised 15% of all unemployed persons in the region, while the youth unemployment rate was 14.7%, below the national average rate
- Education: almost one third of those unemployed in this region had achieved at most lower secondary - one of the highest shares of all regions - while 29% had upper secondary; almost one fifth had some third level and about the same share had some FET qualification
- Sector: those previously employed in construction accounted for 22% of all those unemployed in the Mid-East (with previous or stated employment experience); 17% previously worked in wholesale and retail and 15% in industry
- Occupation: the majority were previously employed in elementary occupations (almost a quarter) and skilled trades (almost a fifth); 13% were operatives and the same share was in sales related occupations.

Figure 4.8 Unemployment by age (Mid-East), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 4.9 Unemployment by education (Mid-East), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 4.10a PES job seekers (Mid-East), May 2015

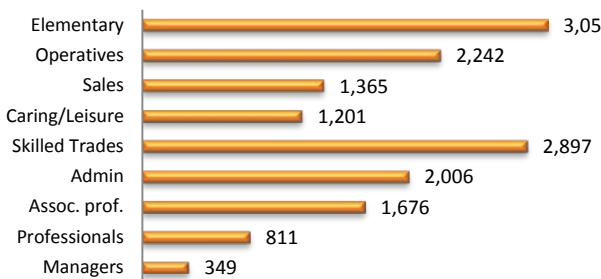
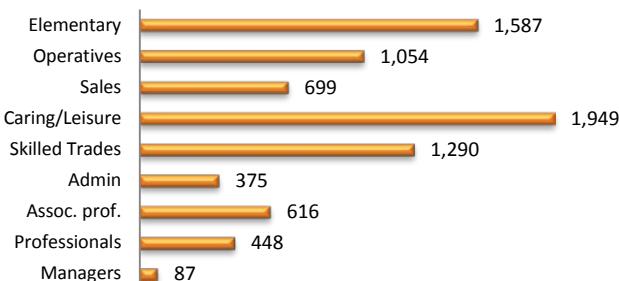


Figure 4.10b PES vacancies (Mid-East), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

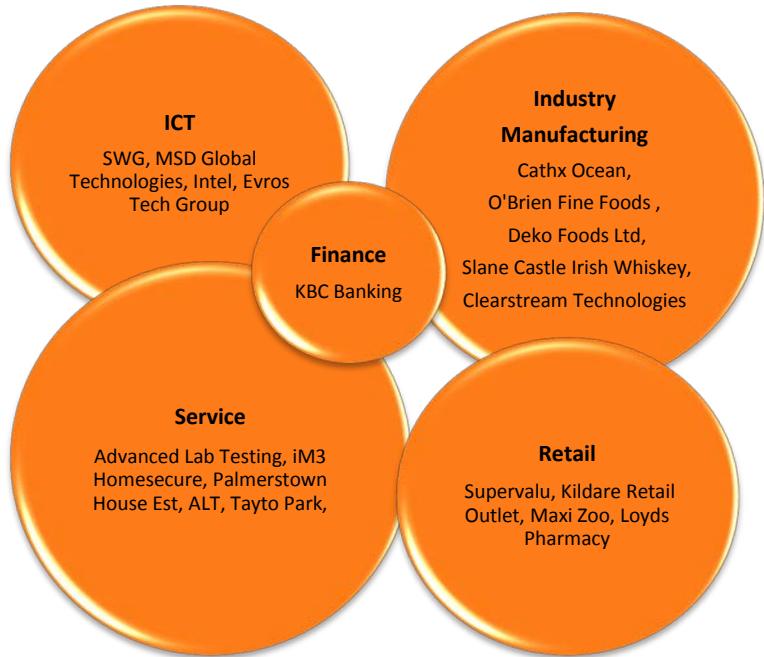
Live register, PES job seekers and vacancies

- In May 2015, there were 34,200 persons on the Live Register in the Mid-East region (a decline of 10% year-on-year); 14% were under 25 years and 59% were male
- In May 2015, 15,600 job seekers were registered with the PES; one fifth of them had previously worked in elementary occupations (construction, process plant), while 19% worked in skilled trades, 14% worked as operatives (process, transport), and 13% in administrative occupations
- In 2014, 8,100 vacancies were advertised through DSP Jobs Ireland in the Mid-East region; the highest number of vacancies was in caring & personal services occupations (care workers), followed by elementary occupations (e.g. catering staff, cleaners, security guards), skilled trades (mainly chefs and butchers), and operatives (process operatives, large goods vehicle drivers).

Employment growth and job creation

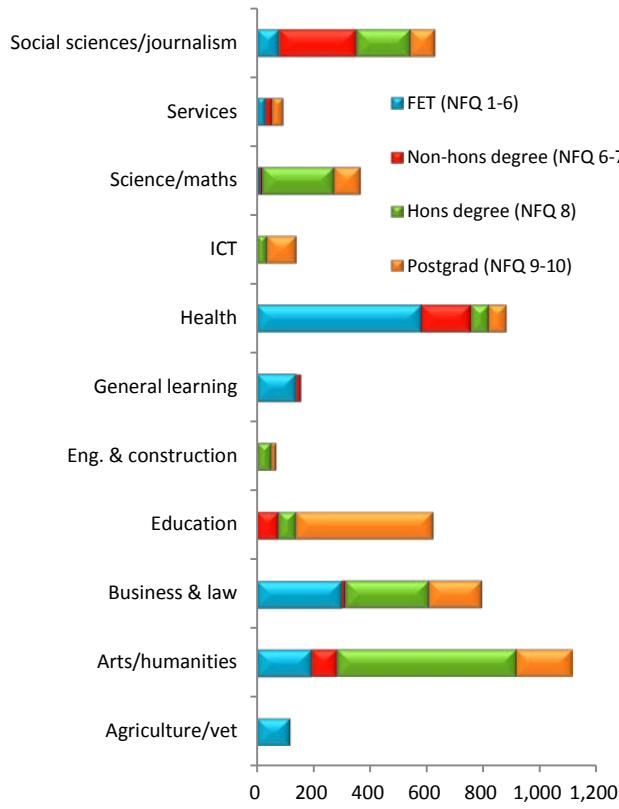
- Over the period quarter 4 2013 to quarter 4 2014, employment expanded, by approximately 12,000 in the Mid-East region
- Employment expanded relatively strongly in construction, which grew by approximately one fifth; industry also grew, as well as transport, professional services, and the broad public sector (mostly health services); employment remained static in other sectors
- Recent job announcements suggest that, over the short to medium term, job opportunities will arise primarily in industry (low and high technology manufacturing), in ICT (MSD Global, Intel), and in a range of services, including professional high value added services (e.g. Advanced Lab Testing).

Figure 4.11 Job creation announcements (Mid-East), 2014 & 2015



Source: Analysis by SOLAS (SLMRU); various sources

Figure 4.12 FET and higher education awards (Mid-East), 2014



Source: QQI (FET major awards), HEA

Education and training awards (Mid-East), 2014

- Of the total of 5,000 awards, the largest numbers were in arts & humanities, followed by health, and business & law
- There were 1,400 FET awards (NFQ 1-6), which was the lowest number of all regions, resulting in the Mid-East accounting for only 5% of all awards in the State; of these, the largest numbers were in health (40%, the highest relative share of all regions), followed by business & law (21%), and arts & humanities (13%)
- Of 3,500 higher education (NFQ 6-10) awards, the largest numbers were in arts & humanities (26%), followed by education (18%), and social sciences (16%); of all the regions, the Mid-East had the highest shares of both arts & humanities and social sciences awards; ICT awards comprised 4%, the lowest share of all regions
- Regarding postgraduate awards, the largest numbers were in education (38%), arts & humanities (16%), and business & law (15%); in the field of education, the number of postgraduate awards exceeded the number of undergraduate awards.

ESL (Early school leavers from education and training): in quarter 4 2014, the ESL rate was 4.7%, below the rate for the State of 6.5%.

NEET: Youth (age 15-24) neither in employment nor in education and training (NEET) rate was 10.8%.

5. Midland



Population	290,800
Working age (15-64)	186,100
Labour force	130,900
Employment	113,700
Unemployment	17,200
Employment rate	58.7%
Unemployment rate	13.1%
Participation rate	59.1%
GVA per person (2012)	€18,638
GVA index (State=100)	54.3

Employment by sector and type

- In quarter 4 2014, there were 113,700 persons in employment in the Midland region; industry and the wholesale & retail sector were largest, employing over 16,000 each; the public sector accounted for 28% of total employment, the highest share of all regions; 10,000 (or 9%) were in agriculture
- Knowledge intensive services (market, high tech and financial) accounted for 9% of employment
- 17% were self-employed, of which 70% self-employed without employees; 2.7% were in State subsidised employment schemes; 23,200 persons entered (new) employment or became self-employed during 2014.

Figure 5.1 Employment by economic sector (Midland), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 5.2 Employment by broad occupation* (Midland), Q4 2014



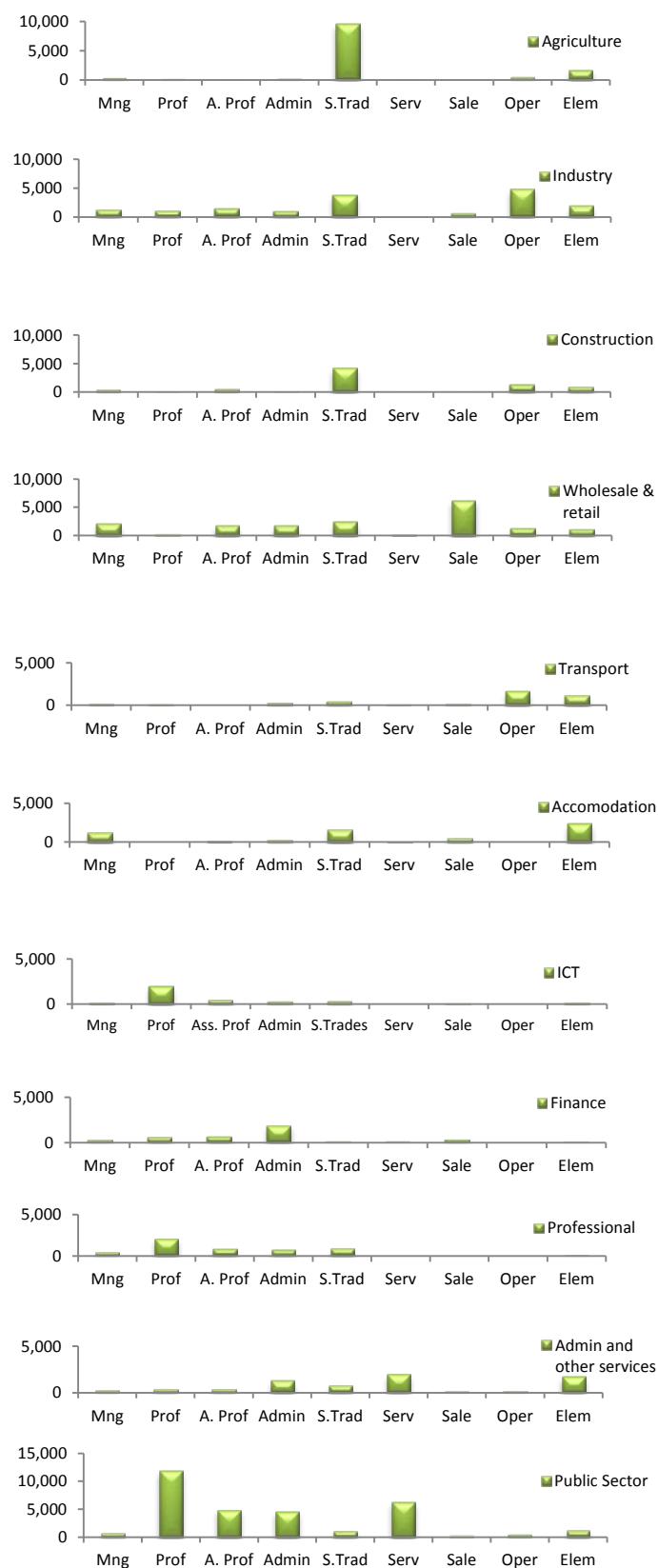
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

Employment by occupation

- In quarter 4 2014, approximately 25,000 persons were employed in skilled trades - this was the largest occupation, accounting for 22% of the total; farmers accounted for 31% of employment in skilled trades
- Those employed in professional occupations accounted for 15% of employment in the region, while associate professionals accounted for 10%
- Administrative / secretarial, operatives and caring & other services occupations each accounted to 10% of employment
- Employment in elementary occupations accounted for 12% of total employment.

Figure 5.3 Employment by occupation and sector (Midland), Q4 2014

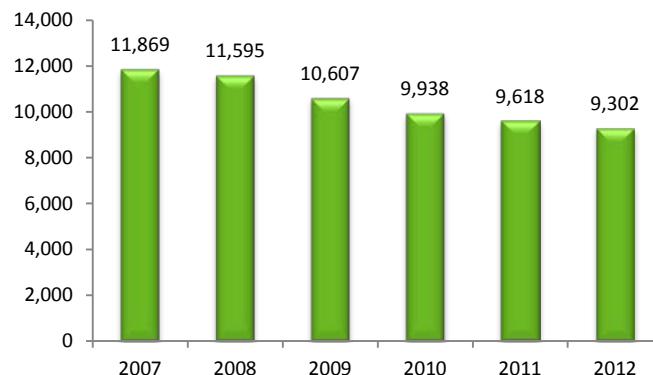


Employment by occupation and sector

- In quarter 4 2014, almost one third of managers were working in wholesale & retail and 15% in industry
- 64% of region's professionals were employed in the public sector, comprising (PAD, education, and health)
 - this occupation then accounted for one third of the total employment in this broad sector; 11% of professionals were working in professional services (where they comprised one third of employment in this sector), while 10% were in industry
- 45% of associate professionals were employed in the public sector, where they accounted for a quarter of employment
- 41% of those working in administrative / secretarial occupations were in the public sector; 15% were working in financial services, where they accounted for more than half of employment; 10% were in industry
- One third of skilled trades were in agriculture (farmers), where they accounted for four fifths of sectoral employment; 23% were in construction, where they accounted for three fifths of employment
- 37% of operatives were in industry, where they accounted for one quarter of sectoral employment
- Almost one fifth of those working in elementary occupations were in accommodation & food services, where they accounted for 56% of employment
- Within occupational groups, the highest employment was in the following occupations:
 - Managers: functional managers
 - Professionals: teachers (primary & secondary), nurses & midwives, accountants
 - Associate professionals: business sales executives
 - Secretarial/admin: Government clerks, financial admin, personal assistants & other secretaries
 - Skilled trades: farmers, metal working production and maintenance fitters, carpenters and joiners
 - Services: care workers and home carers
 - Sales: sales and retail assistants, cashiers and checkout operators
 - Operatives: large goods vehicle drivers
 - Elementary: construction workers, cleaners & domestics, waiting/bar staff.

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 5.4 Active enterprises: Business Economy (Midland)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output, Gross Value Added, 2012

- GVA per person: €18,638
- GVA index (State=100): 54.3
- GVA (share, % of State's total): 3.3

Active enterprises

- In 2012, there were 9,300 active enterprises in the Midland region; between 2011 and 2012, the number declined by 3%
- Over the period 2007 to 2012, the number of active enterprises declined by almost 2,600, or one fifth; construction was particularly adversely affected - the sector lost two fifths of its active enterprises (1,850) over the period
- Wholesale and retail and construction had the largest number of active enterprises, accounting for 26% and 23% of the total respectively; accommodation and food and professional services each accounted for approximately one-in-ten active enterprises
- In terms of their size, 92 % of active enterprises were micro enterprises (with less than 10 persons engaged).

Medium to large enterprises by sector (2014)

- Of all regions, Midland had the smallest number of relatively large enterprises (employing at least 50 persons) in 2014
- The highest number of medium to large enterprises in the Midland region, outside the public sector was found in industry, followed by wholesale & retail, and accommodation & food services
- Within industry, the largest companies were mostly in manufacturing, namely in food processing, and manufacture of plastics products
- Enterprises engaged in general retail were the largest in the wholesale & retail sector
- Hotels were the largest companies in accommodation & food services
- Within professional services, the biggest companies were in accounting and related activities.

Figure 5.5 Sectors with largest enterprises (Midland), 2014

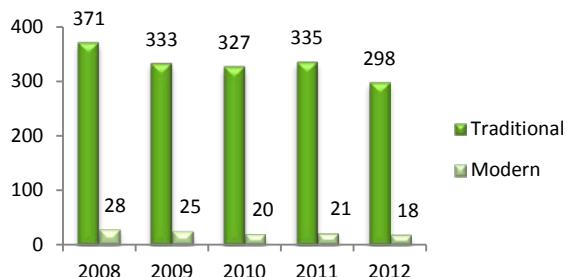


Source: Analysis by SOLAS (SLMRU) based on Datalreland data



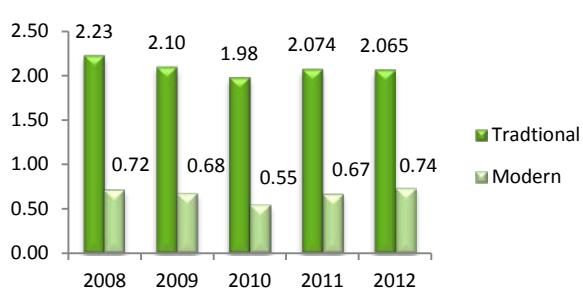
Midland

Figure 5.6a Industrial units (Midland)

**Industrial activity**

- In 2012, 94% of all industrial units (manufacturing, energy and utilities) in the Midland region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased from 356 to 316; the number of units declined in both sectors; the value of gross output increased by over 2%; the modern sector (which grew by 10%) accounted for the entire increase, since the traditional sector remained static
- Over the period 2008-2012, the number of persons engaged declined by approximately 3,300 or by one quarter; as result, there were approximately 10,300 persons engaged in industry in 2012; approximately 3,200 were in foreign owned units, and 7,100 in the Irish owned units
- In 2012, there were approximately 6,600 persons engaged in SMEs, amounting to 64% of all persons engaged; SMEs accounted for 77% of industrial gross output - this was the second highest share across all regions
- In 2012, the share of industrial output exported was 53.7%; this was the lowest share of all regions
- The value of gross output produced in foreign owned industrial units was €1,159 million, the lowest value of all regions
- Within manufacturing activities alone, in 2012, there were 7,000 persons engaged in exporting manufacturing units; 3,300 were engaged in non-exporting units.

Figure 5.6b Gross output in industrial units (Midland), € billion

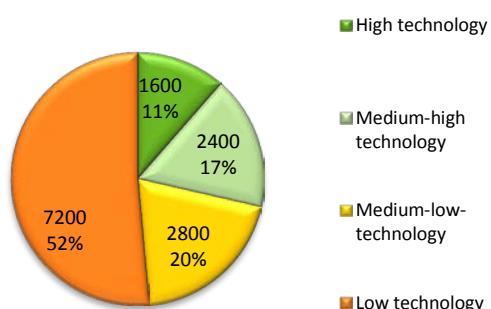


Source: Analysis by SOLAS (SLMRU) based on CSO data

Manufacturing employment

- In quarter 4 2014, approximately 14,000 persons in the Midland region were employed in manufacturing
- Low technology manufacturing accounted for about one half of total manufacturing employment; manufacture of food & beverages accounted for 80% of the low-tech segment and 40% of total regional manufacturing
- Medium-low tech manufacturing (mostly fabricated metal products) accounted for about one fifth of total manufacturing
- Medium-high tech manufacturing (mostly manufacture of machinery and equipment) accounted for 18% of total manufacturing employment
- At 11%, the share of manufacturing employment concentrated in the high tech sector in the Midland region was below national average.

Figure 5.7 Manufacturing employment (Midland), Q4 2014

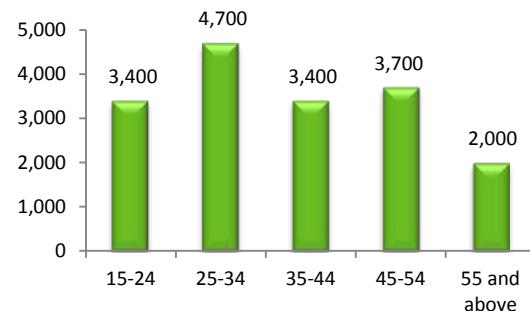


Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

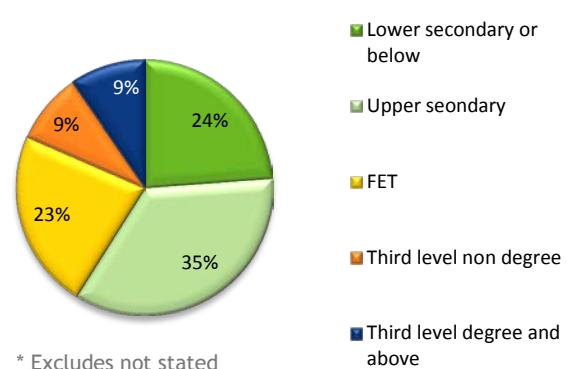
- In quarter 4 2014, there were 17,200 unemployed persons in the Midland; one fifth of them had no previous employment experience, while one third became unemployed during 2014; 65% were long term unemployed, while 30% were out of work for 4 years and longer; the long term unemployment rate was 8.5%
- Age: 27% of unemployed were aged 25-34; 20% were younger than 25 and the unemployment rate for this age group was 29.6%, 10 percentage points above the national average
- Education: almost a quarter of all unemployed had at most lower secondary education, 35% had upper secondary education, almost a quarter had some FET, less than a fifth had attained a third level education; this region had one of the lowest shares of unemployed persons with some third level
- Sector: unemployed persons in the region had primarily been employed in construction, industry, and wholesale & retail
- Occupation: of those unemployed with previous or stated occupation, the largest share had previously been employed in skilled trades (23%), followed by elementary occupations (22%), and operatives (10%).

Figure 5.8 Unemployment by age (Midland), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 5.9 Unemployment by education* (Midland), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 5.10a PES job seekers (Midland), May 2015

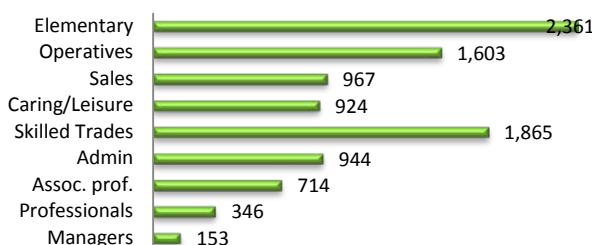
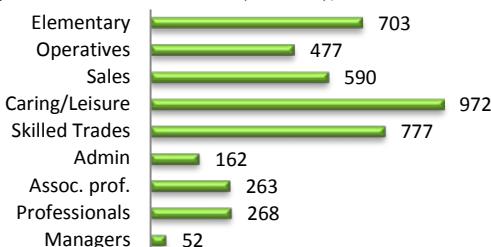


Figure 5.10b PES vacancies (Midland), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

Live register, PES job seekers and vacancies

- In May 2015, there were 28,250 persons on the Live Register in the Midland region (a decline of over 3,000 or 10% year-on-year); 15% were under 25 years and 59% were male
- In May 2015, almost 10,000 job seekers were registered with the PES; the highest number of job seekers (amounting to a quarter of all) had previously worked in elementary occupations (construction and building, process plant), skilled trades (carpenters, painters and decorators, plasterers, bricklayers) or as operatives (HGV/van/mobile machine drivers, process operatives), and sales (sale assistants)
- In 2014, over 4,000 vacancies were advertised through DSP Jobs Ireland in the Midland region; the highest number of vacancies was in caring (care workers) followed by skilled trades (mainly chefs and butchers), elementary occupations (process plant occupations), and sales (collector salespersons, sales assistants).

Employment growth and job creation

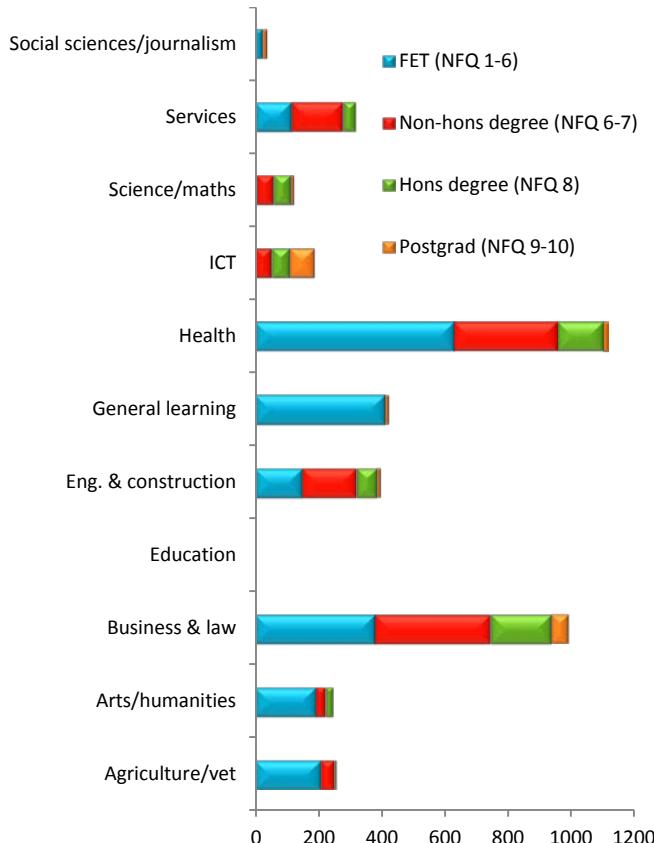
- Over the period quarter 4 2013 to quarter 4 2014, employment in the Midland region increased by approximately 2,500 persons or 2%
- Construction accounted for most of the observed growth; transport also expanded, while employment remained static in other sectors; agriculture contracted
- Recent job announcements suggest that opportunities, in the short to medium term, will arise primarily in industry, specifically in all segments of manufacturing, from low tech (food processing) to medium- high and high tech manufacturing (e.g. MedTech, pharmaceuticals), as well as in some niche areas, including smart electricity grid; a wide range of healthcare jobs is also set to come on stream; construction jobs are set to be mostly associated with industry expansion (e.g. Jazz pharmaceuticals).

Figure 5.11 Job creation announcements (Midland), 2014 & 2015

Source: Analysis by SOLAS (SLMRU), various sources



Figure 5.12 QQI (FET) and higher education awards (Midland), 2014



Source: QQI (FET major awards), HEA

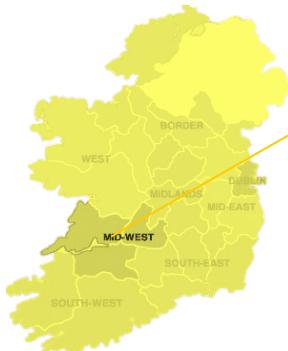
Education and training awards (Midland), 2014

- Of the total of 4,100 awards (NFQ 1-10), the largest number were in health (27%), resulting in the Midland region having the highest share of awards in health; almost a quarter of all awards were in business & law
- Of 2,100 FET awards (NFQ 1-6), most were in health (600 awards, amounting to 30%), followed by business & law (21%), and arts & humanities (13%)
- Of 2,000 HE (NFQ 6-10) awards, most were in business & law (accounting for 31% of HE awards in the region), followed by health (25%); there were 10% in services and 9% in ICT; of all regions, the Midland region had the highest relative share of its awards in each of the above four fields; at just 3%, it had the lowest share of HE awards in the field of arts & humanities
- Postgraduate awards were mostly in ICT (41%) and business & law (27%)

ESL (Early school leaving) from education and training: in quarter 4 2014, the ESL rate was 10% - above the ESL rate for the State.

NEET: Youth (age 15-24) neither in employment nor in education and training (NEET) rate was 19%, above the rate for the State, and the highest rate of all the regions.

6. Mid-West



Population	378,400
Working age (15-64)	242,100
Labour force	170,100
Employment	152,800
Unemployment	17,300
Employment rate:	61.4%
Unemployment rate	10.2%
Participation rate	57.7%
GVA per person (€)	27,464
GVA p.p. index (State = 100)	80.1

Employment by sector and type

- In quarter 4 2014, there were 152,800 persons in employment in the Mid-West region; about 20,000 entered (new) employment during 2014
- Industry was the largest sector, accounting for 16.5% of total employment; wholesale & retail accounted for 15%; public sector accounted for a quarter of employment in the region
- Knowledge intensive services (market, high-tech and financial) accounted for almost 13% of the region's employment
- 17% were self-employed, of which 70% were self-employed with no employees; 2.5% were on State subsidised employment schemes.

Figure 6.1 Employment by economic sector (Mid-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 6.2 Employment by broad occupation* (Mid-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation

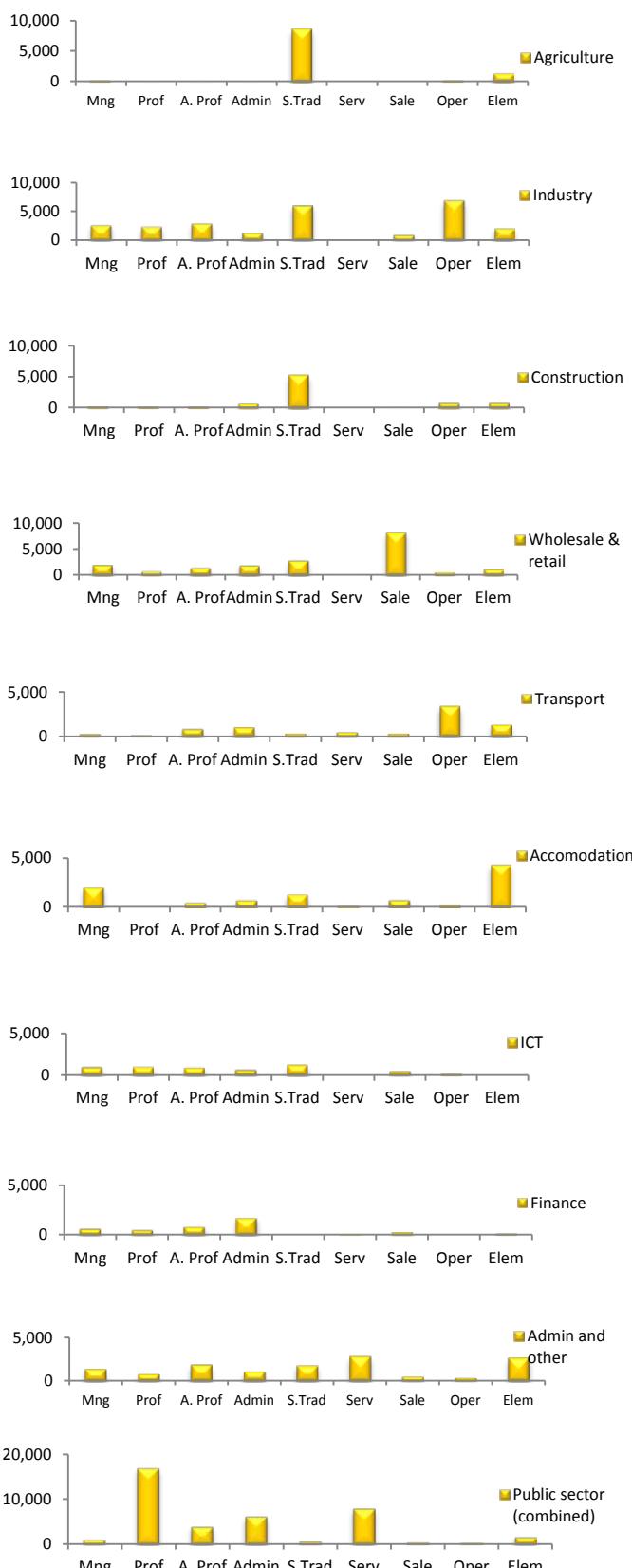
- In quarter 4 2014, almost 29,500 persons were employed in skilled trades; farmers accounted for 28% of employment in this occupational group
- Professionals were the second largest occupation, accounting for 18%; administrative, elementary, and sales & customer service occupations each accounted for about one-in-ten of all persons employed in the Mid-West region
- There were 13,400 persons in associate professional & technical occupations, just slightly more than persons working as operatives (13,000)
- There were 11,000 in managerial and related occupations, and an equal number working in caring, leisure and personal services occupations.

* Excludes not stated



Mid-West

Figure 6.3 Employment by occupation and sector (Mid-West), Q4 2014

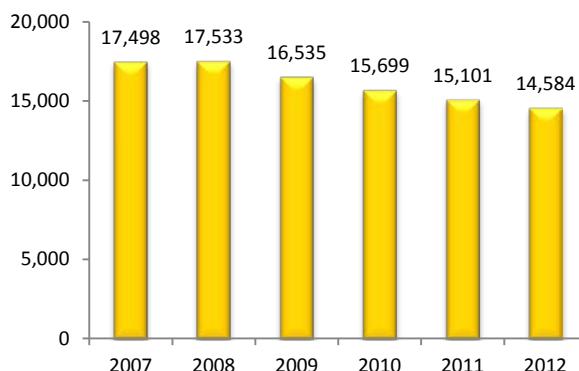


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- 30% of managers were working in wholesale & retail, 16% in industry, and 13% in accommodation & food services
- 59% of professionals were employed in the public sector, comprising (PAD, education, and health) - this occupation accounted for 41% of employment in this broad sector; about a fifth of all professionals were in professional services (where they comprised more than a half of sectoral employment); 11% were in industry and 5% in ICT
- 26% of associate professionals were employed in the public sector, while 23% were in industry
- 44% of those working in administrative / secretarial occupations were in the public sector; 15% were in financial services, where this occupation accounted for more than a half of sectoral employment
- 29% of all working in skilled trades were in agriculture (farmers), where they accounted for four fifths of sectoral employment; almost a quarter were in construction, where they accounted for three fifths of employment
- 70% of all in caring and related occupations were in the public sector (mostly health), where they accounted for one fifth of sectoral employment
- 50% of operatives were in industry, where they accounted for one quarter of employment; one fifth were in transport, where they accounted for 40% of employment
- Those working in elementary occupations were most likely to be in accommodation & food services, with almost a third of them there; they accounted for about a half of employment in this sector
- Within occupations, the highest employment was for:
 - Managers: functional managers/directors, managers and proprietors in wholesale and retail
 - Professionals: teachers, nurses, accountants
 - Associate professionals: business sales executives
 - Secretarial/admin: Government clerks, PAs and other secretaries, and finance admin. occupations (e.g. bank clerks)
 - Skilled trades: farmers, fitters (metal work and maintenance), electricians, chefs & cooks
 - Services: care workers and home carers
 - Sales: sales and retail assistants
 - Operatives: food processing operatives, large goods vehicle drivers.

Figure 6.4 Active enterprises: Business Economy (Mid-West)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output (Gross Value Added, 2012)

- GVA per person: €27,464
- GVA index (State =100): 80.1
- GVA (share, % of State's total): 6.6

Medium to large enterprises by sector

- Outside the public sector, the highest number of medium to large enterprises (almost one quarter of all employing 50 persons or more) in the Mid-West region in 2014 was found in industry, followed by wholesale & retail, accommodation & food, professional services, and construction
- Within industry, the largest companies were in manufacturing, particularly in food processing; in addition, there were sizeable companies in computer, electronic and optical products, pharmaceuticals, chemicals, fabricated metal & basic metal products, and electrical equipment
- Within wholesale & retail the largest companies were in general retail, with presence of specialised retailers
- Engineering activities and related technical consultancy were the largest employers in professional services
- Hotels were the largest enterprises in accommodation & food services.

Active enterprises

- In 2012, there were approximately 14,600 active enterprises in the Mid-West region; this was almost 3.5% fewer than in 2011
- Since 2007, the region lost almost 3,000 enterprises; approximately 2,000 of these were active in construction
- Wholesale and retail had the largest number of active enterprises, approximately 3,500, followed by construction (2,800) and professional services (2,000)
- Nine-in-ten active enterprises had fewer than 10 persons engaged; one-in-twenty had 10-19 persons engaged.

Figure 6.5 Sectors with largest enterprises (Mid-West), 2014



Source: Analysis by SOLAS (SLMRU) based on Datalreland data



Figure 6.6a Industrial units (Mid-West)

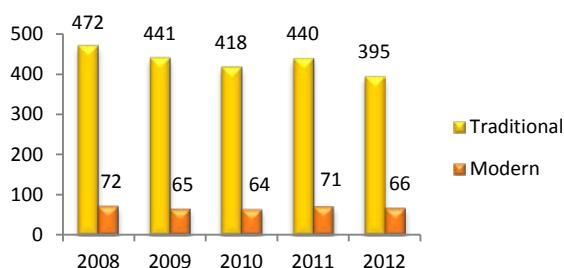
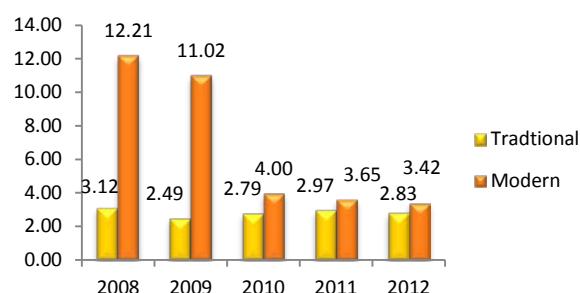


Figure 6.6b Gross output in industrial units (Mid-West), € billion



Source: Analysis by SOLAS (SLMRU) based on CSO data

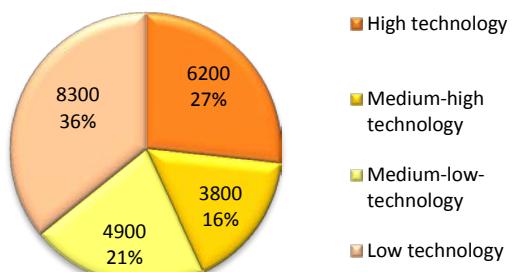
Industrial activity

- In 2012, 86% of all industrial units (manufacturing, energy and utilities) in the Mid-West region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased by 10%; it declined in both sectors (modern and traditional); the value of gross output decreased by 6% in the modern sector and by 5% in the traditional sector
- Over the period 2008-2012, the number of persons engaged in industrial activities declined by 7,800 or by nearly a third; in 2012, there were approximately 17,300 persons engaged in industry - 11,000 (or 64%) of whom in traditional sector
- There were approximately 9,800 engaged in foreign owned industrial units; 7,500 were in the Irish units
- In 2012, there were 8,800 persons engaged in industrial units classified as SMEs, while 8,500 were in large units; SMEs accounted for less than a third of the region's industrial output
- The share of industrial output exported was 81.3%; this was above the average share for the State (77.2%)
- In 2012, the value of gross output produced in foreign owned industrial units was €4,730 million (accounting for 76% of industrial output)
- Within manufacturing activities alone, there were 13,800 persons engaged in exporting units in 2012, which was almost 3,000 fewer than in 2009; there were 3,500 persons engaged in non-exporting units, 900 fewer than in 2009.

Manufacturing employment

- In quarter 4 2014, over 23,000 persons in the Mid-West region were employed in manufacturing
- 27% of these were in high-tech-manufacturing activities (computer, electronic and optical, and, to a lesser extent in pharmaceutical)
- Low technology manufacturing was the largest segment, accounting for over a third of manufacturing employment; within this segment, food & beverages employed 4,500 persons
- Medium-high tech manufacturing (mostly machinery and equipment) accounted for 16% of employment
- Medium-low tech manufacturing (mostly repair and installation of machinery and equipment, manufacture of fabricated metal products, and other manufacturing) accounted for just above a fifth of employment.

Figure 6.7 Manufacturing employment (Mid-West), Q4 2014

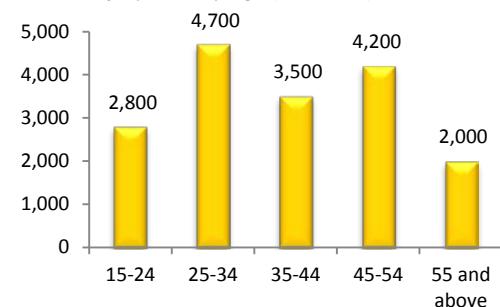


Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

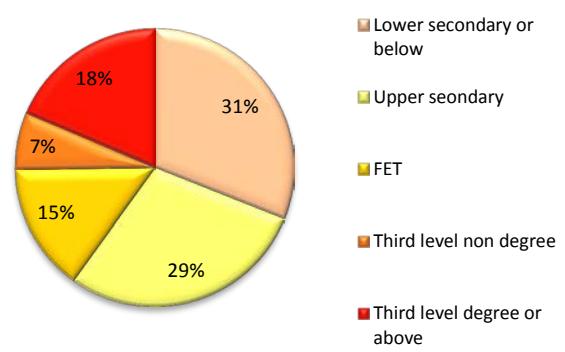
- In quarter 4 2014, there were 17,300 unemployed persons in the Mid-West; this was a 5% decline year-on-year; those seeking work for one year and longer accounted for more than a half of all unemployed, resulting in the long term unemployment rate of 5.4%; those very long term unemployed (4 years and longer) accounted for almost a quarter of all unemployed; more than a fifth had no previous employment experience; two fifths became unemployed during 2014
- Age: 16% all those unemployed in the Mid-West region were younger than 25; the youth unemployment rate was 18%; those aged 25-34 accounted for the largest share of unemployed (27%)
- Education: 31% of all unemployed persons had at most lower secondary education; 29% had attained upper secondary, while 15% held some FET qualifications; a quarter had some third level education
- Sector: most unemployed persons had previously been employed in construction (22%), industry (21%), and wholesale & retail (10%)
- Occupation: most of unemployed persons in the region had previously been employed in skilled trades and in elementary occupations.

Figure 6.8 Unemployment by age (Mid-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 6.9 Unemployment by education* (Mid-West), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 6.10a PES job seekers (Mid-West), May

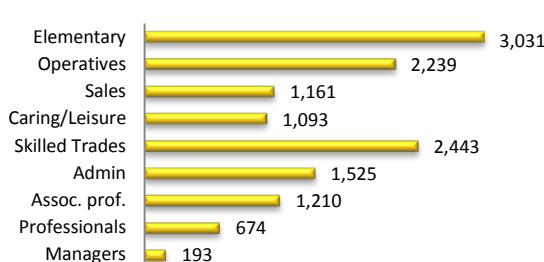
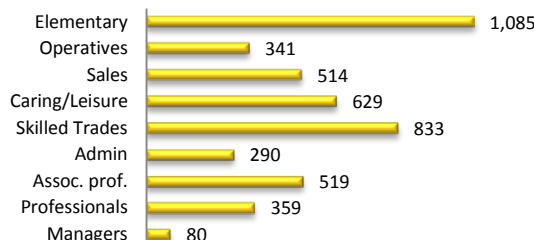


Figure 6.10b PES vacancies (Mid-West), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

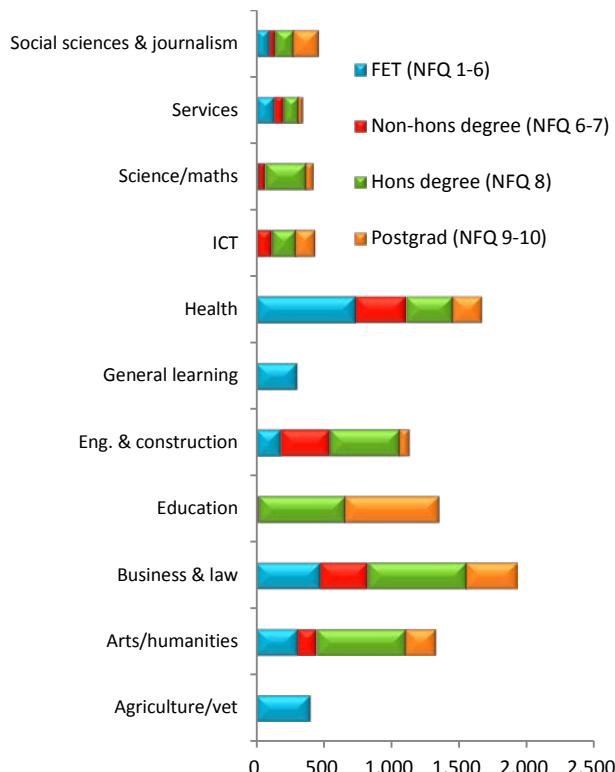
Live Register, PES job seekers and vacancies

- In May 2015, there were 28,200 persons on the Live Register in the Mid-West region, 3,900 fewer than a year ago, or a decline of 12.2%, the biggest decline in relative terms of all regions; those younger than 25 accounted for 15% of all on the Live register, while 60% were male
- In May 2015, 13,600 job seekers were registered with the PES in the region; the highest number had previously worked in elementary occupations (construction, process, catering and security), skilled trades (carpenters, bricklayers, painters, plasterers) or as operatives (process operatives, transport operatives); a considerable number also previously worked in various administrative roles (11%)
- In 2014, 4,650 vacancies were advertised through DSP Jobs Ireland in the Mid-West region; the highest number of vacancies was for elementary occupations (e.g. catering staff, cleaners, security guards and waiters), followed by skilled trades (mainly chefs, butchers and electricians), caring occupations (care workers), associate professionals (business sales & marketing roles), and sales (sales assistants, collector salespersons).

Employment growth and job creation

- Over the period quarter 4 2013 to quarter 4 2014, employment increased by 1% in the Mid-West
- While employment remained static in most sectors, it increased in wholesale & retail, professional services, in construction and health; in contrast, it declined in transport and PAD over the same period
- Recent job announcements suggest that job opportunities will arise in high tech manufacturing, including high value added jobs in R & D (Dell), as well as similar roles in green energy (SolarWinds), but also in relatively low tech manufacturing (e.g. food processing); there will also be openings in ICT services (e.g. ICT customer support), and in financial services in software development linked with financial operations; in addition, there will be demand for skills for international customer services, including positions in international sales and financial operations (e.g. roles associated with fund administration in financial services).

Figure 6.12 FET and higher education awards (Mid-West), 2014



Source: QQI (FET major awards, HEA)

Figure 6.11 Job announcements (Mid-West), 2014 & 2015



Source: Analysis by SOLAS (SLMRU) based on various sources

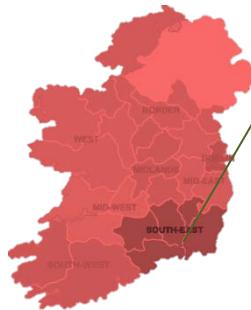
Education and training awards (Mid-West), 2014

- Of the total of 9,800 awards (NFQ 1-10), the largest numbers were in business & law (accounting for a fifth), followed by health (17%), and arts & humanities and education (each accounting for 14% of the total)
- Of 2,600 FET awards (NFQ 1-6), the largest numbers were in health (700, or 28%), followed by business & law (18%), and agriculture (15%); of all regions, the Mid-West had the highest share of FET awards in agriculture
- Of 7,150 higher education (NFQ 6-10) awards, the biggest shares were in business & law and in education (each accounting for one fifth of HE awards), followed by arts & humanities accounting for 14%; ICT and engineering & construction each accounted for 13%; of all the regions, the Mid-West had the highest share of HE awards in the field of education
- Regarding postgraduate awards, the highest numbers were in education (34%) and business & law (19%); arts & humanities and health each accounted for 11%.

Early school leaving (ESL): the ESL rate was 3.1 % in quarter 4 2014 in Mid-West, which was below the rate for the State and the lowest ESL rate observed across the regions.

NEET: Youth (age 15-24) neither in employment nor in education and training (NEET) rate was 9.4%, the lowest of all regions.

7. South-East

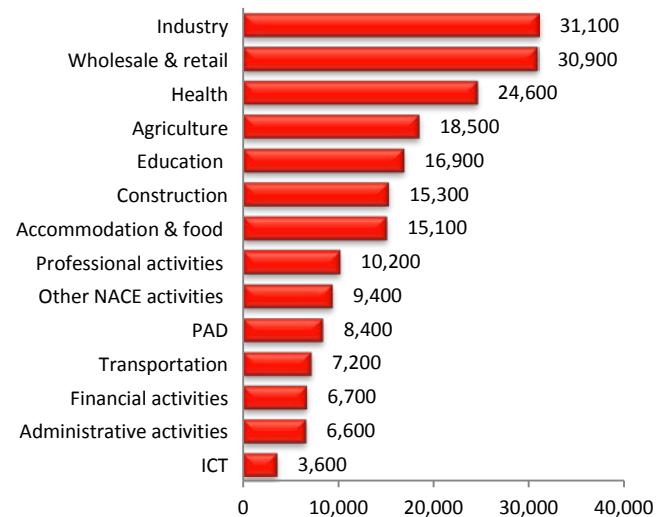


Population	508,100
Working age (15-64)	326,300
Labour force	232,200
Employment	204,500
Unemployment	27,700
Employment rate	60.8%
Unemployment rate	11.9%
Participation rate	58.7%
GVA p.p. basic prices (€):	23,588
GVA index (State =100):	68.8

Figure 7.1 Employment by economic sector (South-East), Q4 2014

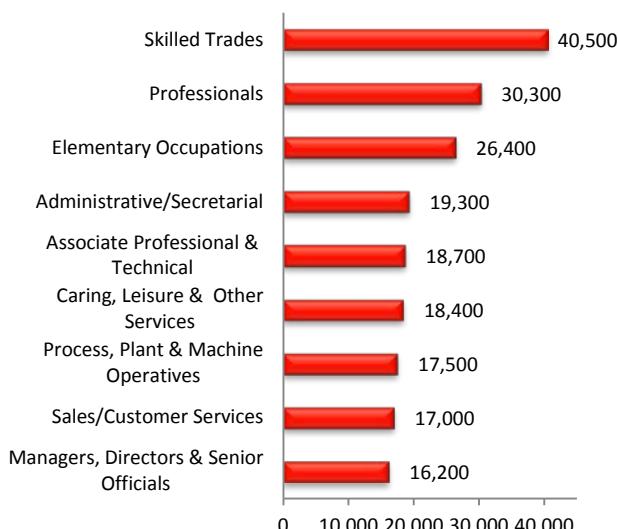
Employment by sector and type

- In quarter 4 2014, there were 204,500 persons in employment in the South-East region; industry and wholesale & retail were the largest sectors, each employing approximately 31,000; the public sector employed 50,000 persons, or one quarter of the total; agriculture was the fourth largest sector, with 18,500 employed
- High value added knowledge intensive services accounted for 10% of the region's employment.
- 19% were self-employed (of which 70% with no employees); 2.3% were in State subsidised employment schemes; 25,000 persons (or 12% of employment) entered employment in 2014, either for their current employer or as self-employed.



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 7.2 Employment by broad occupation* (South-East), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

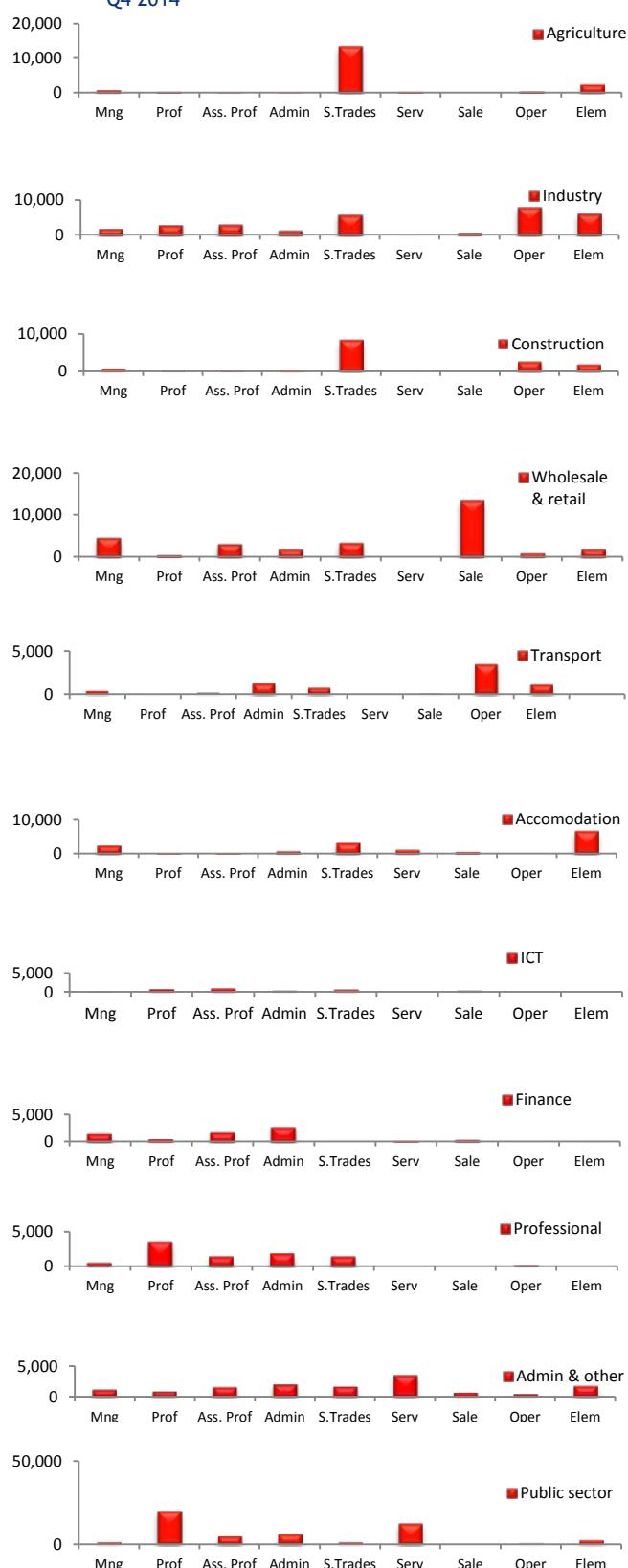
Employment by occupation

- 40,500 persons in the region were employed in skilled trades; this was the largest occupation, accounting for one fifth of total employment; farmers comprised almost a third of these
- Professionals, the second largest occupational grouping, accounted for 15% of total employment
- Those in elementary occupations, the third largest, accounted for 13% of total employment in the region
- Those in administrative, associate professional, caring, leisure & other services, and operative occupations each amounted to about one-in-ten of persons in employment
- Sale & customer services and managerial occupations each accounted for 8% of total employment.



South-East

Figure 7.3 Employment by occupation and sector (South-East), Q4 2014

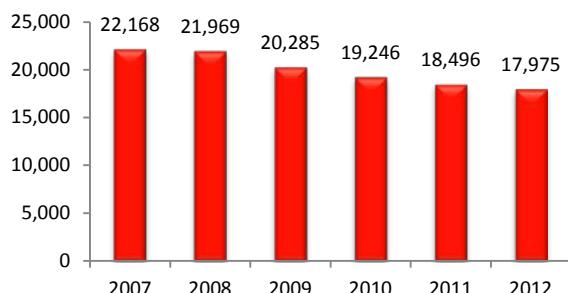


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, 29% of managers were working in wholesale & retail, 15% in accommodation & food, and 12% in industry
- Two thirds of professionals were employed in the public sector, where they accounted for 40% of employment; 12% of all professionals were in professional services (where they comprised more than a third of employment); 10% were in industry
- About a quarter of associate professionals were employed in the public sector, while just under a fifth were in either industry or in wholesale & retail
- A third of those working in administrative / secretarial occupations were in the public sector; 13% were in financial services, where this occupation accounted for more than a third of sectoral employment
- A third of all working in skilled trades were in agriculture (farmers); 21% were in construction, where they accounted for 55% of employment in the sector
- Two thirds of all working in caring and related occupations were in the public sector (mostly health), where they accounted for 25% of sectoral employment
- 46% of operatives were in industry, where they accounted for one quarter of employment; one fifth were in transport, where they accounted for almost a half of sectoral employment
- One quarter of those working in elementary occupations were in either accommodation & food services or in industry; in the former, they accounted for 43% of sectoral total
- Employment was highest in the following occupations:
 - Managers: functional, managers & proprietors in wholesale & retail, and accommodation managers
 - Professionals: teachers, nurses, accountants
 - Associate professionals: sales accounts and business development managers
 - Admin: Government clerks, finance admin occupations (e.g. bank clerks, payroll, book-keepers), PAs and other secretaries
 - Skilled trades: chefs & cooks, farmers, metal working production and maintenance fitters
 - Services: child-minders, carers/home carers, hairdressers and related occupations
 - Sales: retail sales assistants, other sales related
 - Operatives: assemblers and routine, food and beverage process operatives, truck drivers
 - Elementary: construction workers, cleaners, waiting and bar staff.

Figure 7.4 Active enterprises: Business economy (South-East) 2012



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output, Gross Value Added, 2012

- GVA per person: €23,588
- GVA per person index (State=100): 68.8
- GVA share, % of State's total: 7.5%

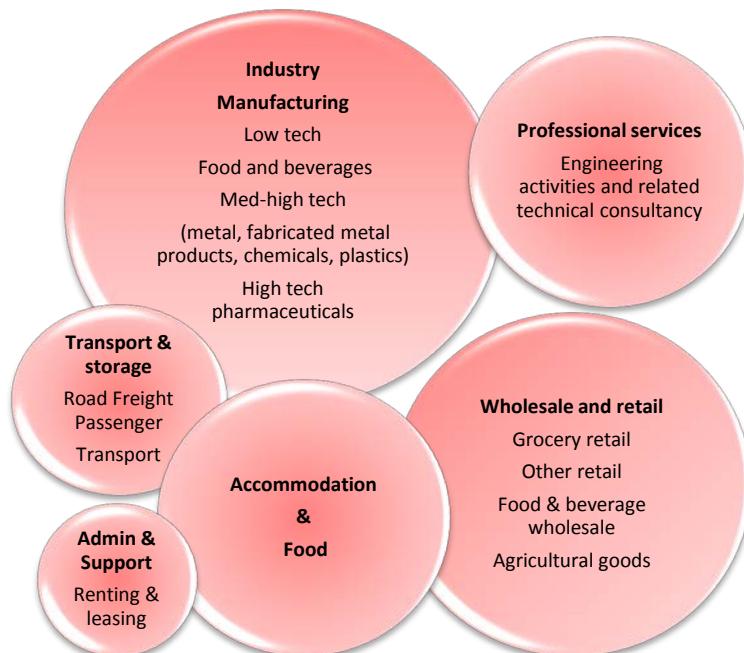
Active enterprises

- In 2012, there were almost 18,000 active enterprises in the South-East region
- Wholesale and retail and construction had the most enterprises, with approximately 4,700 and 3,800 respectively, followed by professional activities (2,100)
- The number of active enterprises has continued to decline: in 2012 there were approximately 500 fewer than in 2011 and almost 4,200 fewer than in 2007; construction alone accounted for about three quarters of the decline since 2007
- Just 1% of active enterprises were medium sized (with 50-249 persons engaged); 92.5% were micro (with less than 10 persons engaged).

Medium to large enterprises by sector

- In the South-East region in 2014, the highest number of medium to large enterprises (outside the public sector) was found in industry, followed by wholesale & retail, and accommodation & food services
- Within industry, the largest companies were in manufacturing, particularly in food processing, followed by manufacture of fabricated metal products and basic metals, pharmaceuticals and chemicals
- Within wholesale & retail the largest companies were in general retail, with sizeable presence of specialised retailers including agricultural goods and related materials
- Hotels were the largest enterprises in accommodation & food services.
- Within professional activities, the largest employers were in engineering activities and related technical activities.

Figure 7.5 Sectors with largest enterprises (South-East) 2014



Source: Analysis by SOLAS (SLMRU) based on Datalreland database



South-East

Figure 7.6a Industrial units (South-East)

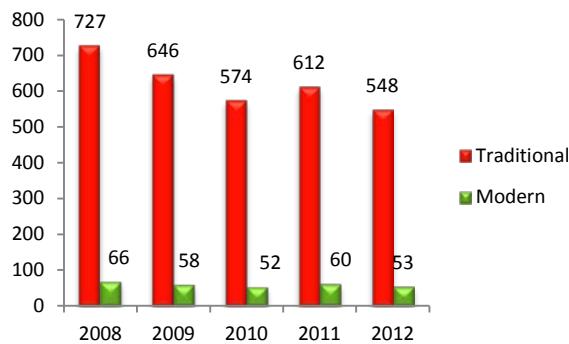
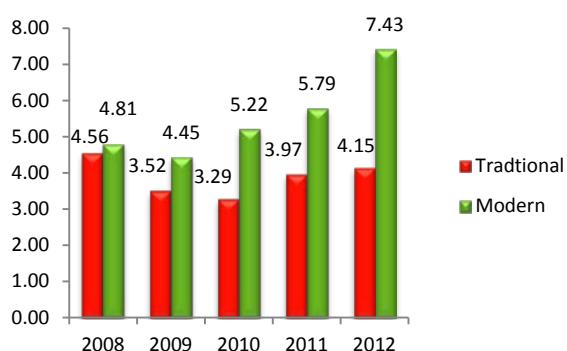


Figure 7.6b Gross output in industrial units (South-East), € billion



Source: Analysis by SOLAS (SLMRU) based on CSO data

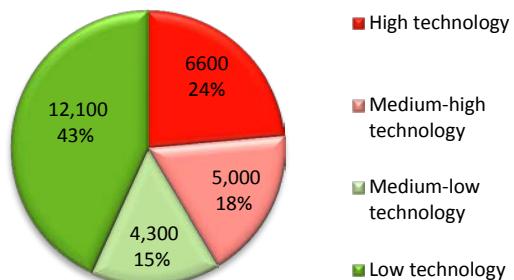
Industrial activity

- In 2012, 91% of all industrial units in the South-East region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased by 11%; the number of units, as well as the number of persons engaged in them, declined in both sectors (modern and traditional); nevertheless, the value of gross output increased by 28% in the modern sector and by 5% in the traditional sector
- Over the period 2008-2012, the number of industrial units declined by about a quarter, while the number of persons engaged in industrial activities declined by approximately 4,200 (from approximately 26,600 to 22,300)
- In 2012, approximately 12,800 persons were in the Irish owned industrial units, while 9,600 were in the foreign owned ones - the latter accounted for about 2/3 of the gross output; approximately 11,700 persons engaged in industrial units classified as SMEs, while 10,600 worked in large ones; SMEs accounted for less than a third of the industrial gross output
- The share of industrial output exported was 81.6%; this was above the share for the State (77.2%)
- Within manufacturing activities alone, there were 17,300 persons engaged in exporting units, 5,000 in non-exporting units; when compared with 2009, the numbers engaged in non-exporting units declined by almost a fifth, while the numbers engaged in exporting units declined only slightly.

Manufacturing employment

- In quarter 4 2014, 28,000 persons in the South-East region were employed in manufacturing
- High tech manufacturing (mostly pharmaceuticals) accounted for 24% of manufacturing employment
- Medium-high tech (mostly manufacture of machinery & equipment) employed 5,000 persons (18%)
- Medium-low tech (mostly manufacture of fabricated metal products) accounted for 15%
- Low tech manufacturing was the largest segment, employing just over 12,000; food processing and beverage related activities accounted for 64% of this segment.

Figure 7.7 Manufacturing employment (South-East), Q4 2014

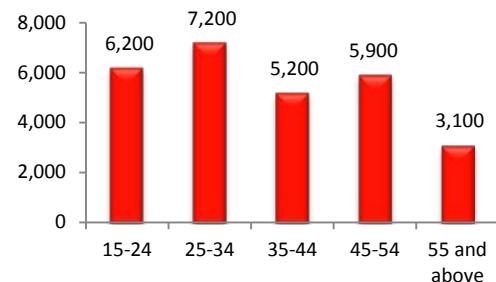


Source: Analysis by SOLAS(SLMRU) based on CSO data

Unemployment

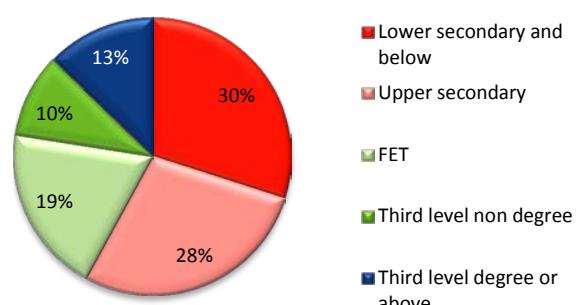
- In quarter 4 2014, there were 27,700 unemployed persons in South-East, a 23% decline y-o-y; three fifths were long term unemployed (those unemployed for 4 years and longer accounted for more than a quarter), resulting in the long term unemployment rate of 7.1%; one fifth had no previous employment experience; two fifths became unemployed during 2014
- Age:** those aged 25-34 accounted for the largest share of unemployment; over a fifth of unemployed were younger than 25, while the youth unemployment rate was 29%
- Education:** 30% of all unemployed who stated their highest level of education had attained at most lower secondary, 28% had upper secondary, one fifth had FET, while 23% had some third level qualifications
- Sector:** a quarter of those with (stated) previous sector of employment had worked in construction, 17% in the public sector, 15% in industry and 12% in accommodation & food
- Occupation:** most of the unemployed had previously worked in elementary (23%), skilled trades (22%), and operative occupations (15%).

Figure 7.8 Unemployment by age (South-East), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 7.9 Unemployment by education* (South-East), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 7.10a PES job seekers (South-East), May 2015

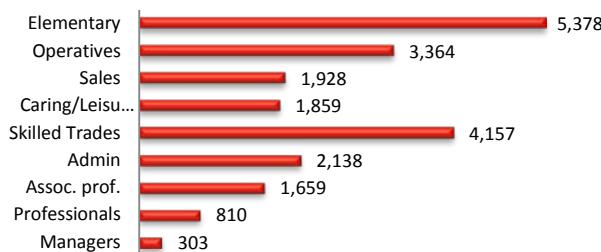
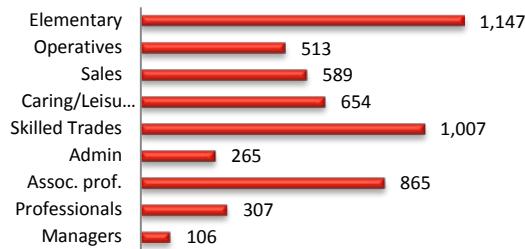


Figure 7.10b PES vacancies (South-East), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

Live Register, PES job seekers and vacancies

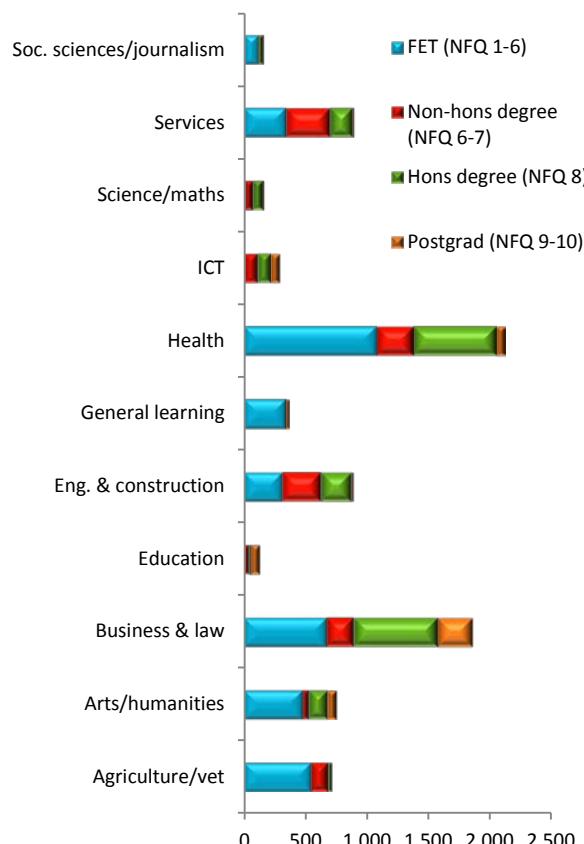
- In May 2015 there were 46,500 persons on the Live Register in the South-East region (4,700 fewer than a year ago); of these, 14% were under 25 years and 61% were male
- In May 2015, approximately 21,600 job seekers were registered with the PES; the highest number of job seekers (5,400, or 25% of total) had previously worked in elementary occupations (process plant, construction), 19% in skilled trades, 16% as operatives, 10% in administrative, and 9% in sales occupations
- In 2014, almost 5,500 vacancies were advertised through DSP Jobs Ireland in the South-East region; the highest number of vacancies was in elementary (e.g. process plant and storage occupations, cleaners and catering staff) and skilled trades occupations (mainly chefs, butchers and electricians), followed by associate professional and technical occupations (business sales executives, IT technicians), and caring (care workers); this was one of only two regions (along with Midland) which experienced a y-o-y decline in the number of vacancies; the declines in vacancies advertised for associate professionals and elementary occupations were offset somewhat by increases in advertisements for skilled trades and professional occupations.



Employment growth and job creation

- Over the period quarter 4 2013 to quarter 4 2014, employment increased by 4%
- The sectors that expanded relatively strongly over the period were industry, construction, accommodation & food; health and agriculture declined, while the remaining sectors remained rather static
- Job opportunities over the short to medium term are set to arise, primarily in industry, with sizeable number in MedTech (e.g. ClearStream); there are set to be a number of opportunities for roles in niche ICT areas (e.g. node technology); financial services are expected to offer a range of opportunities in banking and insurance activities; in addition, the above mentioned industrial expansion (e.g. SmartPly, Bausch&Lomb) is creating a number of construction jobs.

Figure 7.12 FET and higher education awards (South East), 2014



Source: QQI (FET major awards), HEA

Figure 7.11 Job creation announcements (South-East), 2014 & 2015



Source: Analysis by SOLAS (SLMRU) based on various sources

Education and training awards (South-East), 2014

- Of the total of 8,300 awards (NFQ 1-10), the largest numbers were in health, followed by business & law (22%); engineering & construction and services each accounted for 11% of total awards
- Of 3,900 FET awards (NFQ 1-6), the largest number was in health (1,100, or 28%), followed by business & law (17%); there were 550 awards in agriculture and the South-East accounted for a quarter of all FET awards in agriculture
- Of 4,400 higher education (NFQ 6-10) awards, the highest shares were in business & law (27%) and health (24%); 13% were in engineering & construction and 12% were in services; 4% of awards were in agriculture, which was the highest share of awards in the field across all regions; only 3% were in science/math, the lowest share of all regions
- Regarding postgraduate awards, the largest share (44%) were in business & law; education, health, ICT, and arts & humanities each accounted for just above one-in ten of postgraduate awards.

ESL (Early school leaving) from education and training: in quarter 4 2014, the ESL rate was 8%, 1.5 percentage points above the rate for the State.

NEET (Youth, age 15-24, neither in employment nor in education and training): in South-East, approximately 10,000 young people were classified as NEET; the NEET rate was 17%, the second highest of all regions.

8. South-West



Population	671,500
Working age (15-64)	438,100
Labour force	308,300
Employment	275,600
Unemployment	32,700
Employment rate	60.5%
Unemployment rate	10.6%
Participation rate	58.2%
GVA per person (€):	44,391
GVA index (State =100):	129.4

Employment by sector and type

- In quarter 4 2014, there were 275,600 persons in employment; wholesale & retail was the largest sector employing almost 41,000, followed by industry (39,600); ICT employed 11,400, while there were almost 66,500 (24%) in the public sector; accommodation and food was the fourth largest sector, employing 22,000
- Knowledge intensive services (market, high tech and financial) accounted for 13% of employment
- 18% were self-employed, of which 70% had no employees; 2% were in State subsidised employment schemes; 32,000 entered (new) employment during 2014, including starting as self-employed.

Figure 8.1 Employment by economic sector (South-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 8.2 Employment by broad occupation (South-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

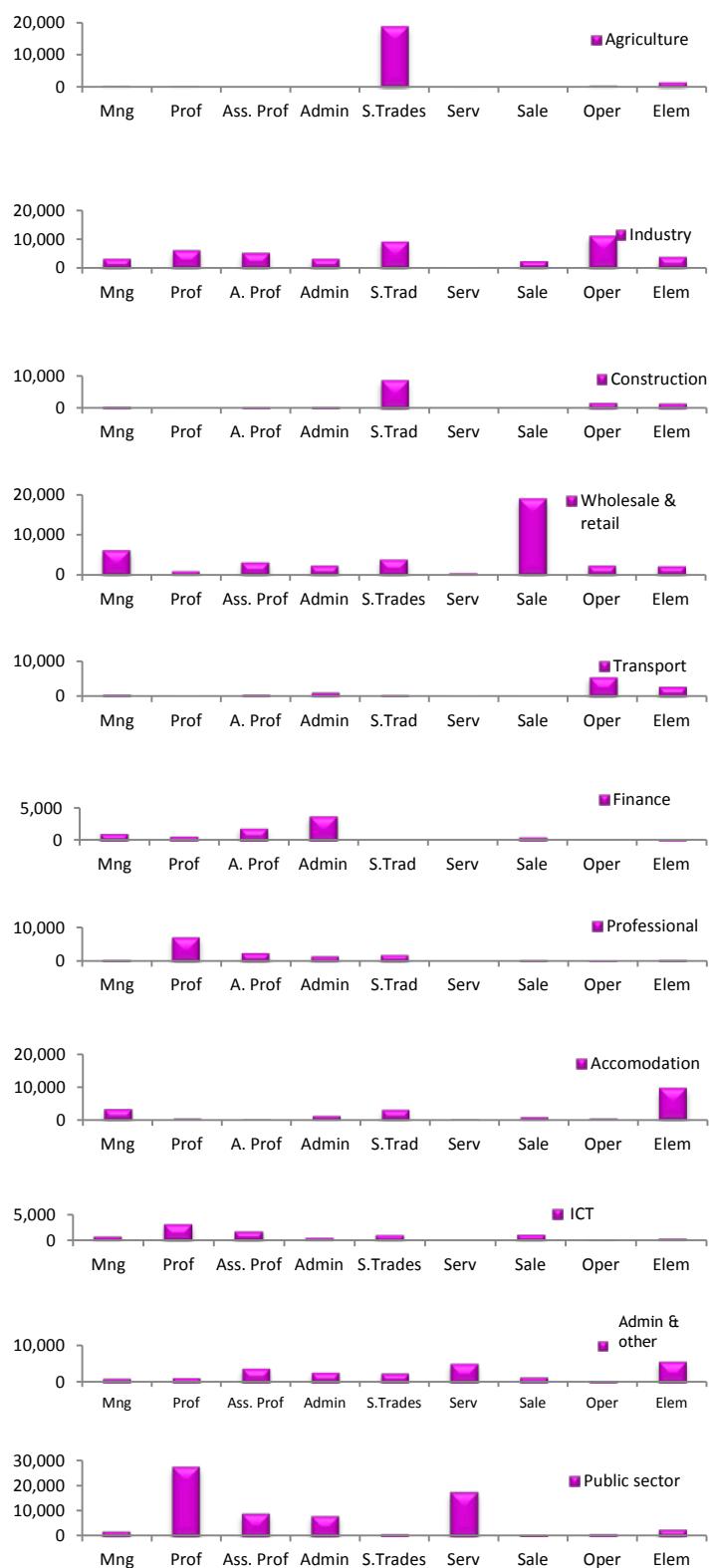
* Excludes not stated

Employment by occupation

- In quarter 4 2014, approximately 52,200 persons were employed in skilled trades, accounting for almost a fifth of total employment in the South-West region; 30% of those were farmers
- Professionals were the second largest occupation, totalling 45,000 persons, while there were 30,100 employed in associate professional occupations
- Elementary occupations totalled 32,700 and were the third largest occupational grouping
- There were almost 22,500 persons employed in caring and other personal services occupations, while almost 25,500 were in sales and customer service occupations
- Almost 22,000 were in managerial and related occupations.



Figure 8.3 Employment by occupation and sector (South-West),
Q4 2014

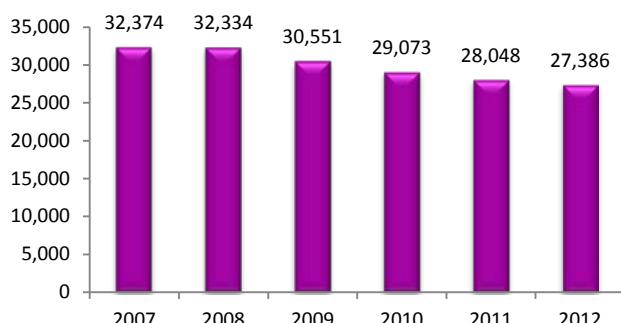


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, almost three-in-five of all professionals were employed in the public sector, while 28% of associate professionals were also employed in this sector
- Almost one fifth of associate professionals were employed in industry, while 10% of them were in information and communication services (ICT)
- 14% of professionals worked in the ICT sector and 10% were in financial services and related activities
- One quarter of managers & directors were employed in wholesale and retail, while 14% of them were working in financial services
- Construction provided employment for a fifth of all skilled trades, while 17% of them were working in industry, and 10% in accommodation and food services; farmers comprised almost one third of skilled trades thus making agriculture the most likely sector of employment for this occupation
- Almost one third of all in elementary occupations were employed in accommodation & food services; 12% were in industry and 9% in construction
- Within occupational groups, the highest employment was in the following occupations:
 - Managers: functional managers/directors, managers/proprietors in wholesale/retail
 - Professionals: primary school teachers, nurses & midwives, accountants, IT professionals, and engineering professionals (e.g. civil engineers)
 - Associate professionals: business sales executives, sales accounts and business development, technicians (e.g. laboratory, IT operations)
 - Secretarial/admin: Finance admin occupations (e.g. bank clerks, wages clerks), PA and other secretaries (medical, legal)
 - Skilled trades: farmers, metal working production and maintenance fitters, chefs
 - Services: carers, hairdressers /barbers, customer service occupations
 - Sales: retail sales assistants / cashiers
 - Operatives: drivers (large goods vehicles), assemblers, routine & chemical process operatives
 - Elementary: construction workers, waiting/bar staff, elementary storage occupations.

Figure 8.4 Active enterprises: Business economy (South-West)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output, Gross Value Added, 2012

- GVA per person: €44,391
- GVA index (State =100): 129.4
- GVA (share, % of State's total): 19

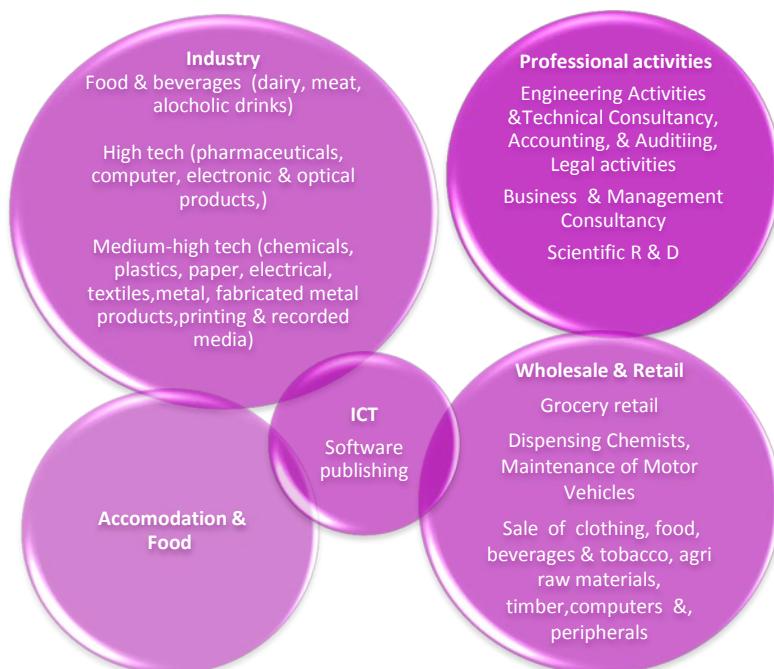
Active enterprises

- In 2012, there were almost 27,400 active enterprises in the South-West region, almost 700 fewer than in 2011; most of the decline was accounted for by enterprises in construction
- Between 2007 and 2012, the number of enterprises decreased by approximately 5,000; again, enterprises in construction accounted for over four fifths of the decline (in 2012, there were approximately 4,000 fewer enterprises in construction than in 2007)
- Wholesale and retail had the largest number of enterprises in 2012, accounting for 23% of the total; despite the decline (by 500, or 8% between 2011 and 2012), construction still accounted for one fifth of all active enterprises in 2012, followed by professional activities, at 17%
- The vast majority (91%) of enterprises had fewer than 10 persons engaged.

Medium to large enterprises by sector

- In the South-West region in 2014, the highest number of medium to large enterprises was found in industry, followed by wholesale & retail, and accommodation & food services (hotels)
- Within industry, the largest companies were in manufacturing (food, metal products, MedTech, pharmaceuticals, electrical, and chemicals)
- Within wholesale & retail the largest companies were in generic retail and specialised stores (e.g. computes & peripherals)
- Within professional activities, the largest employers were in engineering activities and related technical activities
- With ICT, software publishing were the largest.

Figure 8.5 Sectors with largest enterprises (South-West), 2014



Source: Analysis by SOLAS (SLMRU) based on DataIreland database



Figure 8.6a Industrial units (South-West)

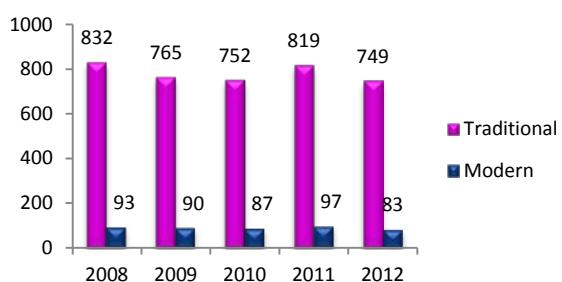
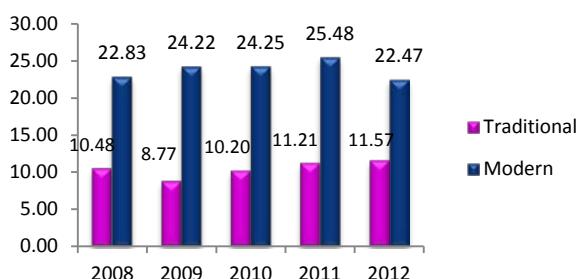


Figure 8.6b Gross output in industrial units (South-West), (€ billion)



Source: Analysis by SOLAS (SLMRU) based on CSO data

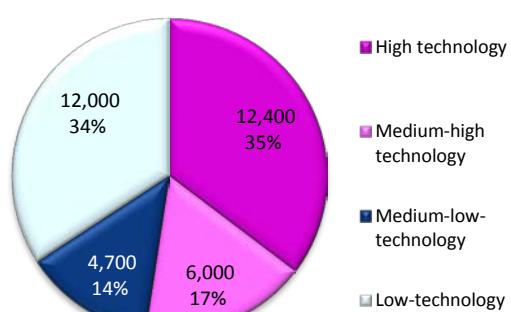
Industrial activity

- In 2012, 90% of all industrial units in the South-West region were in the traditional sector
- Over the period 2011-2012, the number of units decreased by 9%; it declined in both sectors (modern and traditional), together with the number of persons engaged in them; the value of gross output increased in the traditional sector (by 3%) but declined in the modern sector (by 12%); still, the modern sector accounted for almost 2/3 of the output
- Over the period 2008-2012, the number of industrial units declined by 10%; the number of persons engaged in industrial activities declined by 3,700 (11%), with traditional sector accounting for the entire decline
- In 2012, approximately 13,500 persons were in the Irish owned industrial units, while 17,500 worked in the foreign owned ones; the latter accounted for 85% of the output; approximately 15,500 (or 50%) persons were engaged in SMEs; SMEs accounted for just over a third of the region's industrial gross output
- The share of industrial output exported was 82.5%; this was above the share for the State (77.2%)
- Within manufacturing activities alone, there were 24,300 persons engaged in exporting industrial units in 2012, while 6,600 were engaged in non-exporting; when compared with 2009, the numbers declined in both sectors - however the decline was only marginal in the exporting units.

Manufacturing employment

- In quarter 4 2014, approximately 35,000 persons in the South-West region were employed in manufacturing
- High tech manufacturing (e.g. pharmaceuticals, electronics, optical products, etc.) was the largest segment, accounting for 35% of employment; this was above the national average and amongst the highest shares for high tech employment across regions
- Low-tech manufacturing accounted for 34% of employment; food and beverages accounted for three quarters of the segment, translating into one quarter of total manufacturing employment
- Medium-high tech (mostly machinery & equipment) accounted for 17% of manufacturing employment, while medium-low tech manufacturing (mostly fabricated metal products) accounted for 14% of manufacturing employment.

Figure 8.7 Manufacturing employment (South-West), Q4 2014

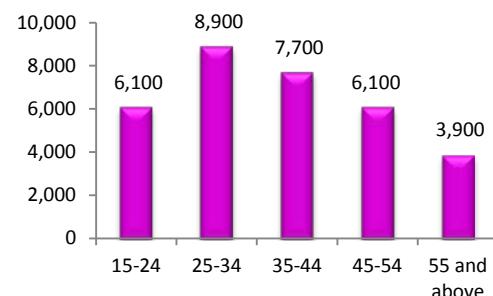


Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

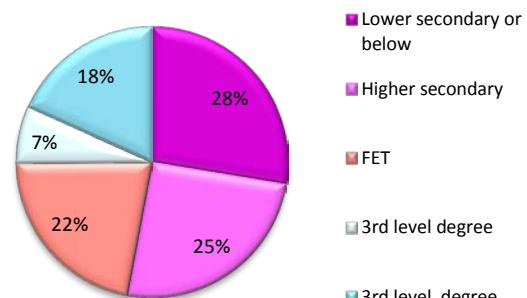
- In quarter 4 2014, there were approximately 32,700 unemployed persons in the South-West region; 20,000 (or 63%) were seeking work for at least 12 months; 11,500 (or 36%) became unemployed during 2014; the unemployment rate was 10.6%; the long term unemployment rate was 6.5%; almost 1/5 of unemployed have never been in employment
- Age: less than a fifth of unemployed persons were aged under 25; the youth unemployment rate was 23.2%
- Education: 28% had at most lower secondary education as their highest level of educational attainment, 25% had higher secondary, while 22% had FET; finally 25% had a third level qualification
- Sector: 25% of all unemployed persons (with previous employment experience) had previously been employed in construction, 15% in the public sector, and 12% in wholesale and retail
- Occupation: 27% of all unemployed persons (with previous occupation) had previously worked in skilled trades, one of the highest shares of all regions; almost a fifth had previously worked in elementary occupations.

Figure 8.8 Unemployment by age (South-West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 8.9 Unemployment by education* (South-West), Q4 2014



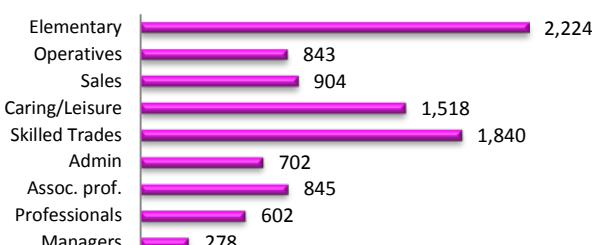
* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 8.10a PES job seekers (South-West), May 2015



Figure 8.10b PES vacancies (South-West), Jan-Dec 2014



Source: Analysis by SOLAS (SLMRU) based on DSP data

Live Register, PES job seekers and vacancies

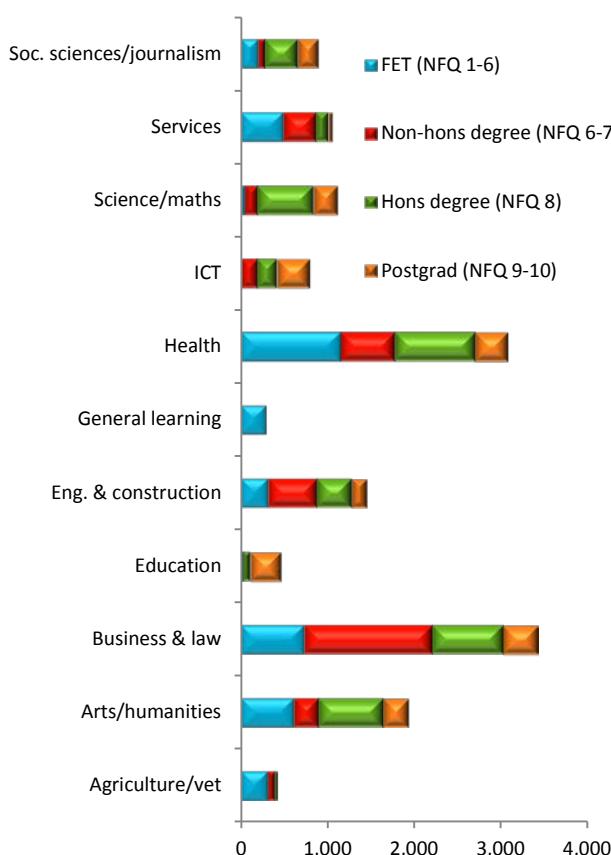
- In May 2015, there were 44,700 persons on the Live Register in the South-West region, 6,000 (or 12%) fewer than a year previously; of these, 12% were younger than 25 years of age, and 61% were male
- In May 2015, approximately 19,700 job seekers were registered with the PES; the highest share of job seekers, 22%, had previously worked in elementary occupations (construction, process plant, catering/hospitality), followed by skilled trades (20%), and operatives (15%); 9% were in sales and an equal share in associate professional occupations
- In 2014, almost 9,800 vacancies were advertised through DSP Jobs Ireland in the South-West region; the highest number of vacancies was in elementary (e.g. catering staff, security guards, cleaners and general labourers) and skilled trades occupations (chefs, butchers, electricians and mechanics), followed by caring (care workers); subsequently, these three occupational groups accounted for 57% of all vacancies advertised in this region; outside of Dublin, this region accounted for the highest share of vacancies advertised in 2014.



Employment growth and job creation

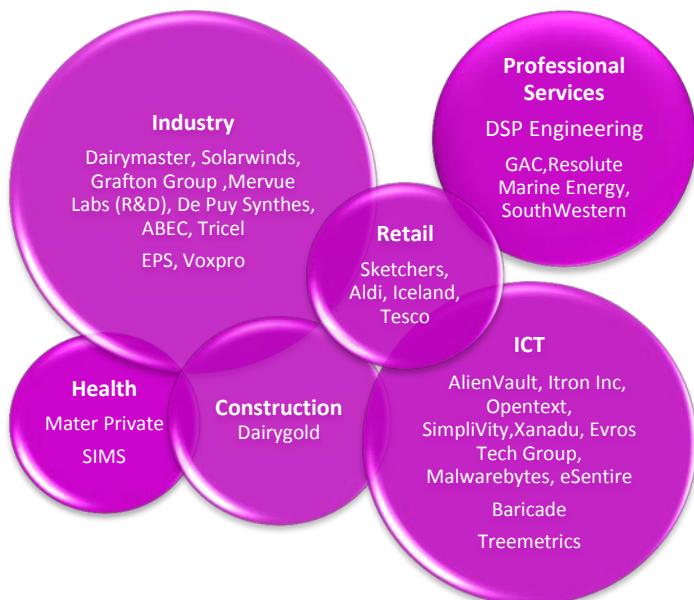
- Over the period quarter 4 2013 to quarter 4 2014, employment decreased by almost 2%
- The relatively strongest growth occurred in the ICT sector, followed by construction; there was also an increase in employment in accommodation & food services; at the same time, the data pointed to relatively sizeable decreases in employment in industry and in health
- Recent job announcements suggest that over the short to medium term job opportunities will arise for a range of roles in industry (e.g. MedTech, Biopharma), ICT (e.g. mobile telephony, web security, etc.), in professional services, construction, health, and retail.

Figure 8.12 FET and higher education awards 2014 (South-West)



Source: QQI (FET major awards), HEA

Figure 8.11 Job creation announcements (South-West), 2014 & 2015



Source: Analysis by SOLAS (SLMRU) based on various sources

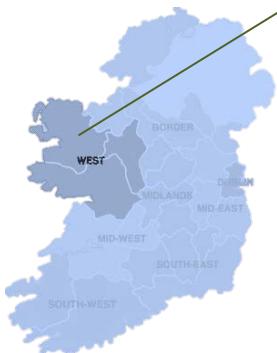
Education and training awards (South-West), 2014

- Of the total of 15,000 awards (NFQ 1-10), the largest share were in business & law (23%), followed by health (21%); 5% of awards were in ICT, which was the highest share of all regions for this field
- Of over 4,100 FET awards (NFQ 1-6), the highest numbers were in health (1,100, amounting to 28% of all FET awards), followed by business & law (18%), arts & humanities (15%), and service (12%); with 500 awards in services, the South-West accounted for a quarter of all FET awards in this field in the State
- Of 10,800 higher education (NFQ 6-10) awards, the largest shares were in business & law (25%) and in health (18%); 12% of awards were in arts & humanities, and 11% were in engineering & construction; 10% were in science & maths and with 1,100 awards, the South-West region accounted for one fifth of all higher education awards in the State in this field
- While postgraduate awards were relatively well dispersed, the highest numbers were in business & law, health, and in ICT

ESL (Early school leaving) from education and training: in quarter 4 2014, the ESL rate was 6%.

NEET (Youth, age 15-24, neither in employment nor in education and training): in the South-West, approximately 9,500 were classified as NEET; the NEET rate was 12%.

9. West

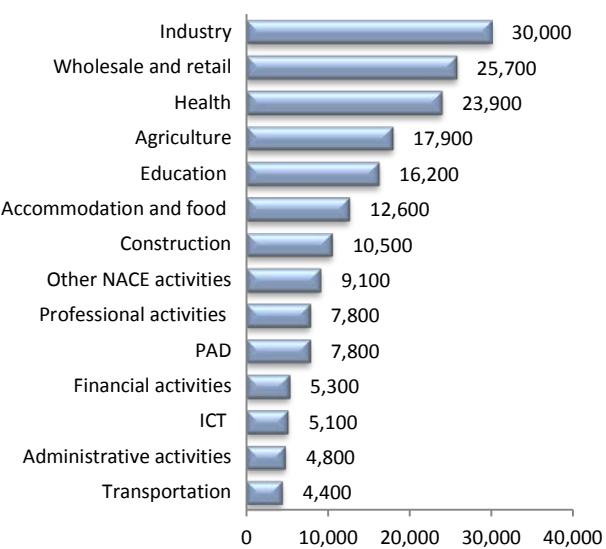


Population	435,000
Working age (15-64)	275,800
Labour force	201,700
Employment	181,100
Unemployment	20,600
Employment rate	62.4%
Unemployment rate	10.2%
Participation rate	59.5%
GVA (Gross Value Added) per person (€)	28,256
GVA index (State =100)	84.0

Employment by sector and type

- There were 181,100 in employment in quarter 4 2014; 22,000 persons entered (new) employment, or started as self-employed during 2014.
- Industry, employing 30,000 persons, was the largest sector; wholesale & retail, employing 25,700, was the second largest
- High value added services - knowledge intensive market, financial and high tech services -accounted for 11% of the region's total employment
- 22% were self-employed, of which 78% had no employees; 1.5% were in some form of State sponsored employment

Figure 9.1 Employment by economic sector (West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 9.2 Employment by broad occupation* (West), Q4 2014



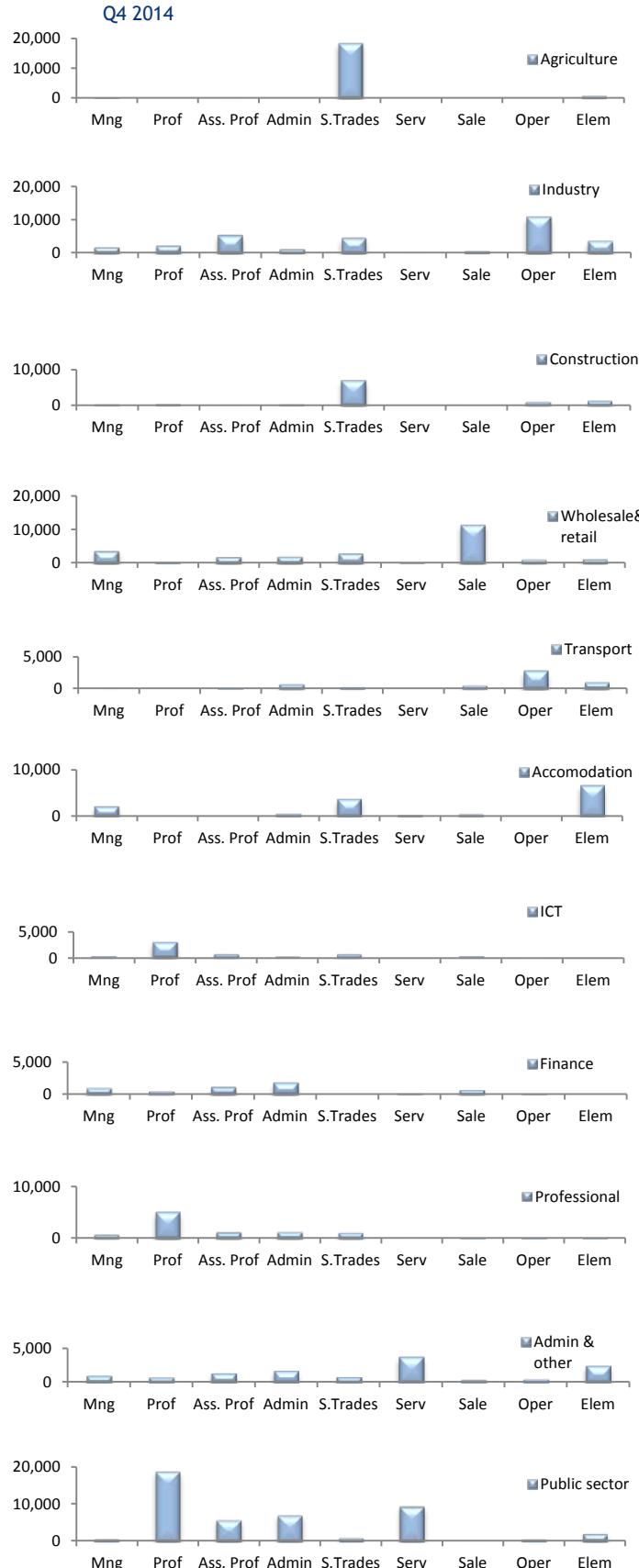
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Excludes not stated

Employment by occupation

- In quarter 4 2014, the largest number were working in skilled trades (approximately 37,200, accounting for just above a fifth of total employment); farmers accounted for 44% of employment in skilled trades and 9% of total regional employment
- Just fewer than 30,000 were employed in professional occupations, accounting for 17% of the region's total, while 19,600 were in associate professional occupations, accounting for 11%
- Operatives, administrative and elementary each comprised 10% of total employment
- 13,700 were in caring and personal services occupations, while just above 13,000 were in sales, and the same number in managerial and related occupations.

Figure 9.3 Employment by occupation and sector (West) (000s), Q4 2014

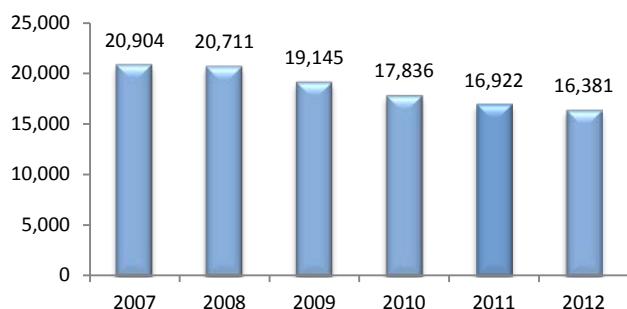


Source: Analysis by SOLAS (SLMRU) based on CSO data

Employment by occupation and sector

- In quarter 4 2014, just over 20,000 professionals (68% of them), were employed in the public sector, where they comprised 42% of sectoral employment
- Managers were most likely to be employed in wholesale & retail (proprietors) - one third of them were in this sector
- 28% of associate professionals were employed in industry, where they comprised almost a fifth of sectoral employment; an equal share were employed in the public sector, where they comprised 10% of employment
- The majority (43%) of those in administrative occupations were employed in the public sector; 15% of them in financial services where they accounted for 50% of total employment in the sector
- 45% of all in skilled trades were in agriculture (farmers), 15% were in industry, and an equal share were in construction (where they accounted for a half of employment in the sector)
- Three quarters of caring and related occupations were in the public sector (mostly in health)
- One half of operatives were in industry, where they accounted for a third of employment
- One third of those in elementary occupations were working in hospitality, where they accounted for a half of sectoral employment
- The highest employment was in the following occupations:
 - Managers: shopkeepers/proprietors, functional managers
 - Professionals: primary and secondary teachers, nurses and midwives
 - Associate professionals: sales and marketing related (e.g. business sales executives, sales accounts managers), science, engineering and production technicians (e.g. laboratory)
 - Secretarial/admin: PA and other secretaries (including medical & legal), Government clerks and finance admin occupations (e.g. bank clerks)
 - Skilled trades: farmers, chefs & cooks, fitters-metal machining and related, vehicle trades
 - Services: carers/home carers, childcare workers
 - Sales: sales and retail assistants
 - Operatives: assemblers/routine operatives, drivers
 - Elementary: construction workers, bar and waiting staff, cleaners & domestics.

Figure 9.4 Active enterprises: Business Economy (West)



Source: Analysis by SOLAS (SLMRU) based on CSO data

Regional economy output, Gross Value Added, 2012

- GVA per person: €28,256
- GVA index (State=100): 82.4
- GVA (share, % of State's total): 8.0

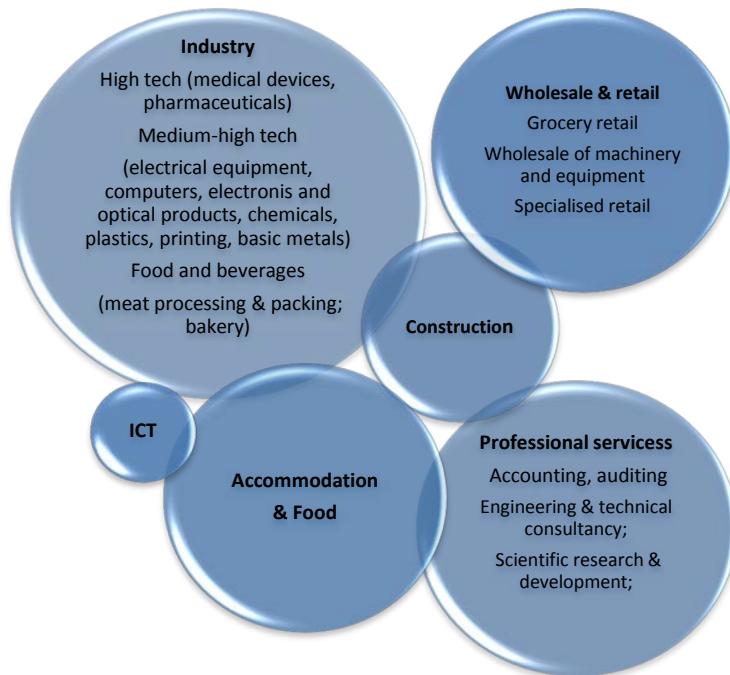
Medium to large enterprises by sector

- In 2014, the highest number of medium to large enterprises in the West region is found in industry, mostly in low tech manufacturing (food processing), high tech (computer, electronic & optical products), medium-high tech (chemicals, plastics, metal products, and electrical equipment)
- There were a number of medium to large companies in wholesale & retail (in generic, as well as specialised retail)
- Within professional services, the largest enterprises were in accounting activities, engineering & technical consultancy, and in scientific R&D
- Within accommodation & food, hotels were the largest employers
- Within the ICT sector, enterprises engaged in software publishing were the largest.

Active Enterprises

- In 2012, there were almost 16,400 active enterprises in the West region, 3% fewer than in 2011
- When compared to 2007, the number of active enterprises declined by approximately 4,500, or 22%
- Wholesale and retail had the largest number of enterprises (approximately 4,000 or almost a quarter of the total); construction accounted for 23%, while accommodation and food and professional services each accounted for 12% of the total active enterprises in 2012
- Over 91% of active enterprises had fewer than 10 persons engaged.

Figure 9.5 Sectors with largest enterprises (West), 2014



Source: Analysis by SOLAS (SLMRU) of DataIreland database

Figure 9.6a Industrial units (West)

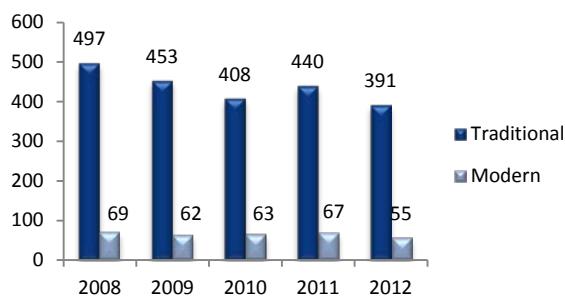
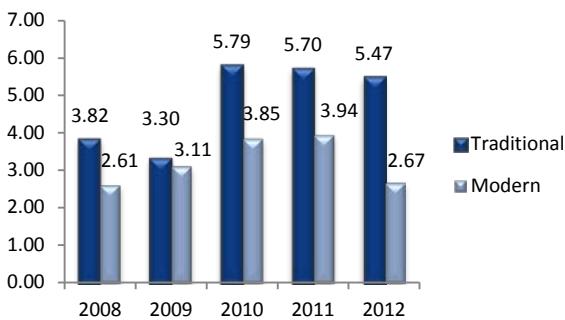


Figure 9.6b Gross output in industrial units (West), € billion



Source: Analysis by SOLAS (SLMRU) based on CSO data

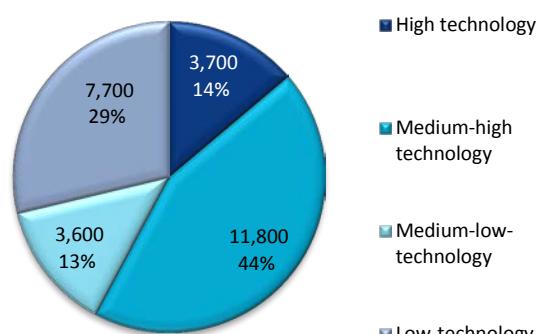
Industrial activity

- In 2012, 88% of all industrial units were in the traditional sector; however, the modern sector accounted for more than a half of persons engaged in industry
- Over the period 2011 to 2012, the number of industrial units decreased in both sectors; the number of persons engaged declined by approximately 4,100; there were 2,600 fewer in the modern sector and 1,400 fewer in the traditional sector
- In 2012, the value of gross output decreased in both sectors; while the decline was relatively more pronounced in the modern sector, its contribution to the regional industrial output still amounted to one third
- Over the period 2008-2012, the number of industrial units declined by a fifth in each sector; the number of persons engaged declined by 4,100 (the traditional sector contracted by 2,200 and the modern sector by 1,900 persons)
- In 2012, approximately 8,100 persons worked in the Irish owned industrial units, while 10,800 worked in the foreign owned units; the latter accounted for four fifths of the region's gross industrial output; while approximately 9,700 persons (or 51%) were engaged in industrial units classified as SMEs, SMEs accounted for only 23% of the region's industrial gross output
- Within manufacturing activities alone, there were 15,000 persons engaged in exporting units in 2012, while 3,900 were engaged in the non-exporting units; when compared with 2009, the number of persons engaged in manufacturing activities declined by 13% in both exporting and in non-exporting units.

Manufacturing employment

- In quarter 4 2014, there were approximately 26,700 persons employed in manufacturing, amounting to 15% of the region's total employment
- Medium-high tech manufacturing employed almost 12,000 person (mostly manufacture of machinery and equipment and manufacture of chemicals and chemical products), accounting for 44% of total manufacturing employment; this region had the highest share of manufacturing employment in medium-high tech manufacturing
- 14% were employed in high tech manufacturing (mostly manufacture of pharmaceutical products)
- Medium-low tech manufacturing (mostly fabricated metal) comprised 13% of manufacturing employment
- Low-tech manufacturing accounted for 29%; manufacture of food and beverages accounted for about one half of low tech manufacturing.

Figure 9.7 Manufacturing employment (West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Unemployment

- In quarter 4 2014, there were 20,600 unemployed persons in the West region, approximately 4,500 fewer than a year previously; of these, more than a half (54%) were unemployed for at least one year, translating into the long term unemployment rate of 5.4%; the unemployment rate for the region was 10.2%; 28% of unemployed were out of work for four years and longer; almost a half became unemployed during 2014; one quarter had no previous employment experience
- Age:** Less than a fifth of unemployed persons were younger than 25 years of age; the unemployment rate for this age group was 21.5%
- Education:** those with at most lower secondary education accounted for 27% of all unemployed; almost a third had some third level (a fifth had at least a degree); 17% had some FET qualifications
- Sector:** those who were previously employed in construction were the largest group, followed by those previously employed in wholesale and retail
- Occupation:** the largest share of unemployed persons had previously been employed in skilled trades, followed by those in elementary occupations.

Figure 9.10a PES job seekers (West), May 2015

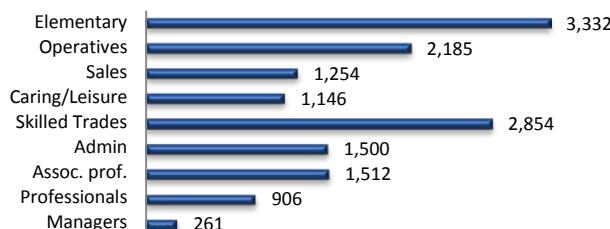
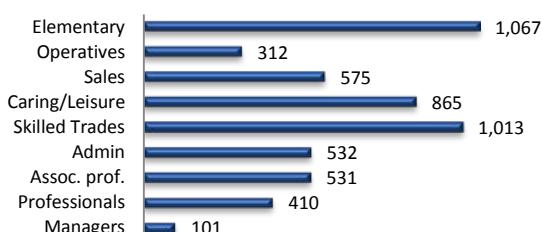
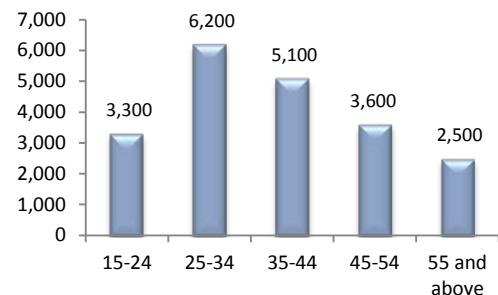


Figure 9.10b PES vacancies (West), Jan-Dec 2014



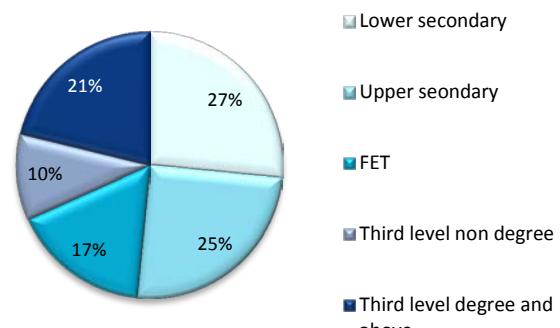
Source: Analysis by SOLAS (SLMRU) based on DSP data

Figure 9.8 Unemployment by age (West), Q4 2014



Source: Analysis by SOLAS (SLMRU) based on CSO data

Figure 9.9 Unemployment by education* (West), Q4 2014



* Excludes not stated

Source: Analysis by SOLAS (SLMRU) based on CSO data

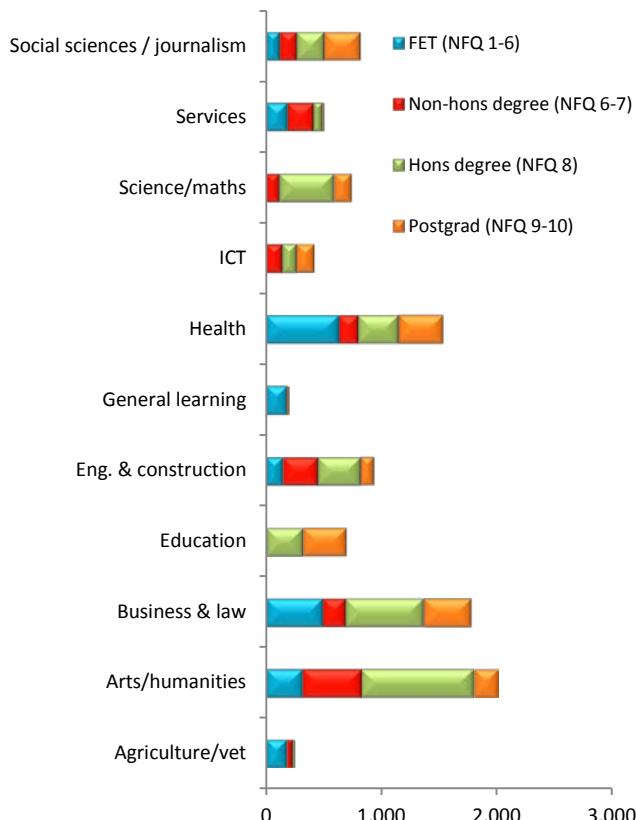
Live Register, PES job seekers and vacancies

- In May 2015, there were approximately 31,200 persons on the Live Register in the West region, which was 4,200 fewer than a year previously, translating into a 12% y-o-y decline; 60% of persons on the Live Register in May were males and 12% were younger than 25 years of age
- In May 2015, 15,000 job seekers were registered with the PES in the region; at 22%, the highest share of job seekers, had previously worked in elementary occupations (process plant, construction, catering/hospitality); 20% were in skilled trades (carpenters, bricklayers, painters); 15% worked as operatives (process operatives, HGV/van drivers); 10% were either in administrative or in associate professional occupations
- In 2014, 5,400 vacancies were advertised through DSP Jobs Ireland in the West region; the highest number of vacancies was in elementary (e.g. catering staff, cleaners and general labourers) and skilled trades occupations (chefs, butchers, electricians and carpenters), followed by caring occupations (care workers).

Employment growth and job creation

- Over the period quarter 4 2013 to quarter 4 2014, the region reported employment contraction, one of the two regions to do so; in absolute terms, the decline was largest in agriculture, which itself accounted for almost half of the contraction; employment increased in services and in industry; in contrast, employment in both the ICT and public sector contracted (each of the sub-sectors of the public sector registered a decline)
- Recent job announcements suggest that job opportunities will arise in industry (high tech manufacturing, mostly MedTech & pharmaceuticals), in ICT, construction, and, to a lesser extent, in wholesale & retail and in finance; the opportunities set to arise will be for a range of ICT professions (especially software development), construction trades, for roles in sales & marketing, customer/user support (including cloud support), and financial admin & support roles.

Figure 9.12 FET and higher education awards, (West), 2014



Source: QQI (FET major awards), HEA

Figure 9.11 Job creation announcements (West) 2014 & 2015



Source: Analysis by SOLAS (SLMRU), various sources

Education and training awards (West), 2014

- Of the almost 10,000 awards (NFQ 1-10), the largest number were in arts & humanities (20%), followed by business & law (18%), health (16%), and engineering & construction (9%)
- Of over 2,200 FET awards (NFQ 1-6), the largest number were in health (600, or 28% of all FET awards), followed by business & law (500, or 22%); 14% were in arts & humanities
- Of 7,600 higher education (NFQ 6-10) awards, the highest shares were in arts & humanities (22%) and business & law (17%); there were 12% in health and 10% each in science & maths and in engineering & construction; there were 9% awards in social sciences, which was the highest share of all regions in this field
- There were over 2,100 postgraduate awards in the West region; of these, 19% were in business & law; education and health each accounted for 18%, and arts & humanities accounted for 10%.

ESL: Early school leavers from education and training: in quarter 4 2014, the ESL rate was 7%, in line with the rate for the State.

NEET: Youth (age 15-24) neither in employment nor in education and training (NEET) rate was 13%, in line with the rate for the State.

Appendix 1: Members of the Expert Group on Future Skills Needs

Name	Organisation
Una Halligan	Chairperson
Marie Bourke	Head of Secretariat and Department Manager, Department of Jobs, Enterprise and Innovation
Inez Bailey	Director, National Adult Literacy Agency
Peter Baldwin	Assistant Secretary, Department of Education and Skills
Ray Bowe	IDA Ireland
John Burke	Department of Public Expenditure and Reform
Liz Carroll	Training and Development Manager, ISME
Ned Costello	Chief Executive, Irish Universities Association
Margaret Cox	Managing Director, I.C.E. Group
Bill Doherty	Executive Vice President, EMEA, Cook Medical
Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Bryan Fields	Director, Strategy, Research and Evaluation, SOLAS
Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Colm Mac Phionnlaoich	Manager CMD and Client Skills, Enterprise Ireland
Deirdre McDonnell	Principal Officer, Department of Education and Skills
Frank Mulvihill	Former President of the Institute of Guidance Counsellors
Brendan Murphy	President, Cork Institute of Technology
Alan Nuzum	CEO, Skillnets
Peter Rigney	Industrial Officer, ICTU
Tom Boland	CEO, Higher Education Authority

Appendix 2: Recent Publications by the Expert Group on Future Skills Needs 2013-2015

Report	Date of Publication
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2014	July 2015
National Skills Bulletin 2015	June 2015
Vacancy Overview 2014	May 2015
Lifelong Learning among Adults in Ireland, Quarter 4 2014	May 2015
A Study of the Current and Future Skills Requirements of the Marine/Maritime Economy to 2020	April 2015
The Expert Group on Future Skills Needs Statement of Activity 2014	April 2015
Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015 - 2020	February 2015
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2015	January 2015
Regional Labour Markets Bulletin 2014	September 2014
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2014	August 2014
National Skills Bulletin 2014	July 2014
Vacancy Overview 2013	May 2014
Assessing the Demand for Big Data and Analytics Skills, 2013 - 2020	May 2014
The Expert Group on Future Skills Needs Statement of Activity 2013	March 2014
Regional Labour Markets Bulletin 2013	March 2014
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2014	February 2014
Addressing Future Demand for High-Level ICT Skills	November 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2013	July 2013
National Skills Bulletin 2013	July 2013
Future Skills Requirements of the Manufacturing Sector to 2020	April 2013
The Expert Group on Future Skills Needs Statement of Activity 2012	April 2013
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2013	February 2013
Vacancy Overview 2012	February 2013
Regional Labour Markets Bulletin 2012	January 2013

Appendix 3: Glossary

The following abbreviations are used throughout the report:

CSO	Central Statistics Office
DJEI	Department of Jobs, Enterprise and Innovation
DSP	Department of Social Protection
E	Employment
E rate	Employment rate
EEA	European Economic Area
ESL	Early School Leavers
ESRI	Economic and Social Research Institute
ETB	Education and Training Board
FET	Further Education and Training
HEA	Higher Education Authority
ICT	Information and Communication (broad economic sector, NACE Rev 2)
ILO	International Labour Organization
LF	Labour Force
LR	Live Register
NACE	Nomenclature statistique des activités économiques dans la Communauté européenne
NEET	[Young people] Neither in Employment nor in Education or Training
P rate	Participation rate (i.e. labour force participation rate)
PAD	Public Administration and Defence (including compulsory social security)
PES	Public Employment Service
PLC	Post Leaving Certificate
QNHS	Quarterly National Household Survey
QQI	Quality and Qualifications Ireland
SOC 2010	Standard Occupational Classification 2010
UE	Unemployment

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