

# Regional Labour Markets Bulletin 2012

# Regional Labour Markets Bulletin 2012

Report prepared by the Skills and Labour Market  
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## Foreword

On behalf of the Expert Group on Future Skills Needs, I am very pleased to introduce the *Regional Labour Markets Bulletin 2012*, compiled by the Skills and Labour Market Research Unit in FÁS. This report is the first in an annual series of publications describing the regional labour markets in Ireland.



Over the last number of years, there has been an increasing emphasis on the value of evidence-based decisions relating to skills supply and demand in the labour market. Adopting a stronger, data-driven approach to decision making at regional level requires an understanding of both the labour market and the business composition of each region's employment base; this is to ensure that the skills supply available is suited to the needs of the employer, as well to assist job seekers and school leavers identify current and future employment opportunities. This report, the *Regional Labour Markets Bulletin 2012*, was compiled in recognition of the fact that there are geographical and sectoral variations in employment opportunities and skills supply.

The Report provides an understanding of the labour market at regional level for each of Ireland's eight regions: Border, Dublin, Mid East, Midland, Mid West, South East, South West, and West. Key data examined includes: labour market indicators (e.g. labour force, employment composition by occupation, sector, etc.), a profile of key businesses and industries, potential job opportunities (advertised job vacancies, recent job announcements), current skills supply (job seeker data) and potential skills supply (current enrolments in further and higher education and training).

Regional labour market information is of vital importance in meeting the challenges of a changing economic environment and the data outlined in this report will be of use to a range of stakeholders at regional level in the areas of education and training provision, labour market policies, immigration and career guidance.

A handwritten signature in black ink that reads "Una Halligan". The signature is written in a cursive, flowing style.

Una Halligan  
Chairperson, Expert Group on Future Skills Needs



## Executive Summary

The Regional Labour Markets Bulletin 2012 is the first in a series of annual reports produced by the Skills and Labour Market Research Unit in FÁS on behalf of the Expert Group on Future Skills Needs (EGFSN). The aim of this series of reports is to support decision making at regional and national level in the areas of education and training provision, labour market policies, immigration and career guidance by providing data on the demand and supply of skills for the Irish regions.

### Selected key points

- In terms of labour market indicators, there are many similarities across regions; e.g. occupational distribution of Public Employment Services (PES) vacancies, age and gender profile of the Live Register, contribution of the decline in the construction sector to labour market difficulties, continued sourcing of IT and healthcare skills from abroad etc.
- There are also many differences across regional labour markets; e.g. contribution of agriculture to the regional employment, unemployment rate, labour force participation rate, share of white collar employment, recent employment growth rates etc.
- In quarter 1 2012, in each region, the wholesale and retail sector accounted for c. 15% of regional employment; Dublin was overrepresented in ICT, professional and financial services
- In 2010, 40% of active enterprises outside agriculture and the public sector were located in Dublin and Mid-East
- In all regions, c. 90% of enterprises are micro enterprises, employing fewer than 10 persons
- Over one third of the value of industrial output in 2010 was produced in the South West
- Almost one in five persons working in manufacturing in 2012 was employed in the South West region
- In quarter 1 2012, the share of white collar workers in regional employment was highest in Dublin (60%) and lowest in the Border, Midland and South East (less than 45%)
- The distribution of PES vacancies in 2012 did not vary significantly across regions, with most vacancies advertised for associate professionals (mostly sales), labourers and service workers
- Between quarter 1 2008 and quarter 1 2012 employment declined in each region; in each region, in absolute terms, the greatest decline was in construction (decline was greater than the gain during the preceding four years (quarter 1 2004 to quarter 1 2008))
- Between quarter 1 2011 and quarter 1 2012, employment continued to decline (albeit at a lower rate than previously observed) in Dublin, the Border, Mid West and South East; it remained relatively stable in the Midland, South West and West, while it increased in the Mid East and South West

- In each region, Live Register levels have stabilised (at high levels) since mid 2010; the age and gender distributions of persons on the Live Register do not vary significantly across regions (less than 20% are aged under 25 and over 60% are male)
- In quarter 1 2012, unemployed persons previously employed in the construction sector accounted for the highest share of unemployment in each region
- In quarter 1 2012, the share of skilled tradespersons amongst the unemployed was highest in the South East and South West (27%) and lowest in the Mid West (18%) and Dublin (19%)
- In quarter 1 2012, in each region, the highest share of job seekers registered on PES had previously worked as skilled tradespersons or labourers (between one fifth and one quarter each).

## Introduction

This report describes regional labour markets in Ireland in 2012. Its objective is to support the decision making process at regional level in the areas of education and training provision, labour market policies, immigration and career guidance by providing data on the demand and supply of skills for the eight NUTS 3 regions in Ireland.

The analysis is based on the NUTS 3 regional classification, which is also used in the official Central Statistics Office (CSO) reporting nationally and internationally (e.g. Eurostat). NUTS 3 regions are: Border, Dublin, Mid East, Mid West, Midland, South East, South West, and West.<sup>1</sup>

### NUTS3 regions in Ireland

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

Various data sources are used in the analysis. These include: CSO Quarterly National Household Survey (QNHS), CSO Census of Industrial Production, CSO Business Demography, CSO Live Register, Data Ireland (company database), Department of Social Protection (DSP)/FÁS Jobs Ireland, Irishjobs.ie, IDA, newspapers, DSP Job seekers (Client Services System), Higher Education Authority (HEA), Department of Education and Skills (DES) (for Post Leaving Cert (PLC) course data). There are several issues which should be borne in mind when interpreting the data:

- The report aims to profile the regional labour markets; however, recruitment for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country; 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
- The report used 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 quarter 1 2012, vacancy data covers the first nine months of 2012 etc.)
- The units of measurements used differ across data sources (e.g. CSO QNHS uses the ILO definition of employment, Business Demography counts persons engaged in active enterprises etc.); these are indicated when presenting the data
- In many instances, data at regional level is too small for statistical inferences and may be subject to statistical error (e.g. observation less than 1000 cannot be reported for any statistics based on the QNHS; changes over time may be variation caused by sampling, not a trend)

<sup>1</sup> The NUTS 3 classification differs from the proposed Education and Training Boards (ETB) regions: in the CSO classification, Tipperary is divided into Tipperary South and Tipperary North, with the former classified in the South East region, and the latter in the Mid West region; there is only one ETB for the whole of Tipperary; in the CSO classification, Mayo is classified in the West region; in the ETB classification, Mayo is grouped with Sligo and Leitrim, which the CSO classifies as the Border counties; in the CSO classification, Meath is classified in the Mid East region; in the ETB grouping, it is grouped with Louth, which the CSO classifies as a Border county.

- Occupational classifications differ across data sources and some accuracy is lost through mappings (e.g. DSP uses MANCO, CSO uses Standard Occupational Classification (SOC) 2010)
- In relation to vacancy data, **only** vacancies advertised through the Public Employment Service (FÁS/DSP) are presented; the PES vacancy data is a subset of all vacancies and underrepresents the total vacancy market in the country
- In each region, examples of companies which recently announced job creation are given; these are not an exhaustive list of all companies and are for illustrative purposes only; much of the job creation amongst micro or small companies may not be mentioned
- The education and training overview covers only a sub-set of all provision and uses enrolments for all years of a course duration (e.g. 1 year or up to 5 years for some courses such as medicine) as a measure
- The term ‘industry’ should not be confused with ‘manufacturing’; the industrial sector includes manufacturing, extraction/mining, and utilities, with the largest share being made up of manufacturing activities
- While cognisant of the fact that a share of healthcare and education is provided by the private sector, in a number of instances in the report, these two sectors (together with Public Administration and Defence (PAD)) are referred to as ‘the public sector’, given the significant share of State provision in these areas.

Note on classification: throughout this document, occupations are classified according to SOC 2010 occupational groups; however, for brevity and clarity purposes, the following terms will be used in addition to the SOC 2010 occupation classification:

| SOC 2010 Occupational Group   | Also known as     |
|---|-------------------|
| Associate professional/technical occupations (e.g. laboratory technicians, business sales executives) | Technicians       |
| Administrative and secretarial occupations  | Clerks            |
| Skilled trades occupations (e.g. chefs, electricians, construction trades, welders, farmers)          | Craftpersons      |
| Caring leisure and other service occupations (e.g. childminders, care workers hairdressers)           | Personal services |
| Elementary occupations (e.g. waiters, cleaners, construction labourers)                               | Labourers         |

## Report Structure

The report begins with an overarching chapter where relevant labour market data is presented for all regions together, thereby allowing regions to be compared with each other and with the national average. This is then followed by eight chapters, each focusing on one of Ireland’s eight administrative regions outlining region specific labour market information.

# 1. Overview of the Regions

## Labour market indicators

Table 1 presents demographic and labour market statistics by region for quarter 1 2012. In terms of the population size and density, Dublin was the largest region accounting for more than a quarter of the national population and with a density of over a 1,000 persons per km<sup>2</sup>. Although the Midland region had the smallest population (under 300,000), the population density was the lowest in the West region at 31 persons per km<sup>2</sup>.

Dublin accounted for over a quarter of the national labour force. The highest labour force participation rate was in Dublin, Mid East and West, at over 60%; the lowest was in the Border region. At over 60%, the highest employment rates were in the Mid East and Dublin; the lowest in the Border region - almost ten percentage points lower. Dublin and the Mid East had the lowest unemployment rates (13%), while the highest unemployment rate was in the South East, where one in five persons in the labour force was out of work, which is five percentage points higher than the national unemployment rate.

Table 1. Demographic and labour market statistics by region, q1 2012

|            | Area km <sup>2</sup> | POP 000s | P/km <sup>2</sup> | POP 15-64 000s | LF 000s | E 000s | UE 000s | E rate | UE rate | P rate |
|------------|----------------------|----------|-------------------|----------------|---------|--------|---------|--------|---------|--------|
| Border     | 12,200               | 503      | 41                | 326            | 203     | 173    | 31      | 52%    | 15.0%   | 52%    |
| Dublin     | 900                  | 1,197    | 1,330             | 805            | 580     | 504    | 76      | 61%    | 13.1%   | 61%    |
| Mid East   | 6,100                | 551      | 90                | 368            | 271     | 237    | 34      | 63%    | 12.5%   | 65%    |
| Midland    | 6,500                | 281      | 43                | 181            | 125     | 102    | 23      | 55%    | 18.1%   | 58%    |
| Mid West   | 8,300                | 375      | 45                | 246            | 177     | 149    | 28      | 58%    | 15.8%   | 60%    |
| South East | 9,400                | 511      | 54                | 331            | 230     | 185    | 45      | 54%    | 19.7%   | 58%    |
| South West | 12,200               | 654      | 54                | 430            | 301     | 261    | 40      | 59%    | 13.2%   | 58%    |
| West       | 13,800               | 430      | 31                | 281            | 209     | 175    | 33      | 60%    | 15.9%   | 62%    |
| Ireland    | 70,000               | 4,502    | 64                | 2,966          | 2,095   | 1,786  | 309     | 59%    | 14.7%   | 60%    |

Source: Analysis by FÁS (SLMRU) based on CSO data; [www.iro.ie](http://www.iro.ie)

## Sectoral employment

Table 2 presents sectoral distribution of employment in each region in quarter 1 2012. In each region, the wholesale and retail sector was one of the largest, accounting for approximately 15% of employment. In terms of employment share, agriculture was negligible in the Dublin region, while it accounted for almost 10% in the South East and Border regions. Similarly, in Dublin, less than 10% of employment was in industry, while in most other regions it was 15% or more. In each region, at least one quarter of the total regional employment was in public administration, education and health.

Dublin's share in the national employment in the financial, ICT and professional services sectors, exceeded 40%; this was higher, by over 10 percentage points, than its share in the total national employment of 28%. In fact one of two persons working in the financial sector was located in Dublin. With the exception of the Mid East and Dublin, the share of employment in the financial, ICT and professional services sectors in each region was below the national average. By contrast, the Border and South East had a higher than average share in the total employment in agriculture.

Table 2. Sectoral employment by region, (000s) q1 2012

| Sector                  | Border       | Dublin       | Mid East     | Midland      | Mid West     | South East   | South West   | West         | Ireland        |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----------------|
| Agriculture             | 13.8         | 1.6          | 8.1          | 7.2          | 8.7          | 16.4         | 12.1         | 12.7         | 80.7           |
| Industry                | 24.1         | 38.1         | 31.2         | 15.2         | 23.4         | 30.9         | 40.5         | 29.1         | 232.6          |
| Construction            | 11.7         | 20.1         | 14.7         | 7.7          | 10.2         | 11.0         | 17.0         | 10.3         | 102.7          |
| Wholesale and retail    | 25.2         | 69.4         | 37.9         | 16.2         | 20.7         | 27.7         | 42.0         | 24.4         | 263.5          |
| Transportation          | 8.3          | 32.4         | 9.5          | 4.4          | 9.0          | 8.1          | 11.3         | 5.9          | 88.8           |
| Accomm. and food        | 11.4         | 27.6         | 12.2         | 6.1          | 9.7          | 11.8         | 21.4         | 11.5         | 111.6          |
| ICT                     | 3.5          | 35.4         | 11.4         | 2.3          | 5.4          | 3.6          | 8.0          | 5.5          | 75.2           |
| Financial               | 4.4          | 48.8         | 16.6         | 3.2          | 6.2          | 5.3          | 8.3          | 6.2          | 99.0           |
| Professional activities | 5.9          | 38.7         | 13.1         | 3.9          | 6.1          | 8.1          | 12.0         | 7.7          | 95.5           |
| Admin. and support      | 5.9          | 19.8         | 8.1          | 3.3          | 4.4          | 5.2          | 9.2          | 4.2          | 60.1           |
| PAD                     | 10.7         | 28.2         | 13           | 7.7          | 9.1          | 8.8          | 12.7         | 9.6          | 99.9           |
| Education               | 14.4         | 40.7         | 18.8         | 8.3          | 10.5         | 15.9         | 21.5         | 15.7         | 145.8          |
| Human health            | 23.5         | 69.7         | 29.7         | 12.1         | 16.6         | 23.9         | 34.6         | 24.1         | 234.1          |
| Other NACE activities   | 9.9          | 33.3         | 13.1         | 4.8          | 8.5          | 7.9          | 10.6         | 8.7          | 96.8           |
| <b>Total</b>            | <b>172.9</b> | <b>503.8</b> | <b>237.4</b> | <b>102.3</b> | <b>148.7</b> | <b>184.5</b> | <b>261.1</b> | <b>175.4</b> | <b>1,786.1</b> |

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

In 2010 there were almost 200,000 active enterprises outside of agriculture and the public sector in Ireland. Of these, 30% were located in Dublin, while Dublin and the Mid East combined accounted for just over 40% of total national active enterprises. Of the total number of active enterprises in the financial sector, over 60% were in Dublin, while all other regions had shares of less than 10%. Only 2% of national enterprises in the financial sector were located in the Midlands. Dublin also had a high share of active enterprises in the ICT and professional services sectors, at 53% and 42% respectively.

Table 3. Number of active enterprises by business economy sectors and region<sup>2</sup>, 2010

| Region                   | Border        | Dublin        | Mid East      | Midland      | Mid West      | South East    | South West    | West          | Ireland        |
|--------------------------|---------------|---------------|---------------|--------------|---------------|---------------|---------------|---------------|----------------|
| Mining and quarrying     | ***           | ***           | ***           | ***          | ***           | ***           | ***           | 72            | 381            |
| Manufacturing            | 1,551         | 2,587         | 1,494         | 816          | 1,102         | 1,501         | 2,003         | 1,128         | 12,790         |
| Electricity, gas, supply | ***           | ***           | ***           | ***          | ***           | ***           | ***           | ***           | 310            |
| Water; sewerage, waste   | 122           | 175           | 96            | ***          | ***           | ***           | 127           | ***           | 825            |
| Construction             | 4,900         | 7,938         | 5,007         | 2,512        | 3,380         | 4,605         | 6,549         | 4,580         | 40,459         |
| Wholesale and retail     | 5,141         | 11,347        | 4,790         | 2,532        | 3,697         | 4,828         | 6,518         | 4,175         | 43,981         |
| Transportation           | 1,374         | 2,543         | 1,393         | 627          | 882           | 1,187         | 1,588         | 847           | 10,572         |
| Accomm. and food         | 2,097         | 3,379         | 1,453         | 944          | 1,698         | 2,007         | 2,902         | 1,952         | 16,511         |
| ICT                      | 437           | 5,319         | 1,049         | 230          | 567           | 496           | 1,055         | 653           | 10,057         |
| Financial and insurance  | ***           | 3,326         | 308           | 128          | 268           | 234           | 408           | 241           | 5,282          |
| Real estate activities   | 991           | 4,363         | 1,378         | 468          | 801           | 967           | 1,590         | 1,002         | 11,673         |
| Professional activities  | 1,899         | 13,083        | 3,250         | 1,037        | 2,056         | 2,207         | 4,633         | 2,059         | 30,801         |
| Admin. and support       | ***           | 3,853         | 1,304         | 544          | 1,132         | 1,057         | 1,590         | 1,033         | 11,789         |
| <b>Total</b>             | <b>19,873</b> | <b>58,046</b> | <b>21,596</b> | <b>9,938</b> | <b>15,699</b> | <b>19,246</b> | <b>29,073</b> | <b>17,836</b> | <b>195,431</b> |

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

The following activities have been excluded: agriculture, public sector and the activities of holding companies  
 \*\*\* denotes small numbers which have been excluded to protect the confidentiality of individual enterprises

<sup>2</sup>The geographical breakdown is approximate as it is based on the address at which an enterprise is registered for Revenue purposes, rather than where the business operates; the discrepancy in totals is due to a 'region unknown' category which has been excluded.

Table 4 presents the share of active enterprises (outside agriculture and the public sector), by size, for each region for 2010. In all regions, the overwhelming majority of enterprises were micro enterprises - employing fewer than 10 persons. In 2010, with the exception of Dublin, over 90% of active enterprises in each region employed fewer than 10 persons. The highest share of micro enterprises was in the Midland and Border regions. The share of enterprises employing over 250 persons was less than 1% in all regions.

Table 4. Active enterprises by enterprise size, 2010

| Company size | Border | Dublin | Mid East | Midland | Mid West | South East | South West | West  | Ireland |
|--------------|--------|--------|----------|---------|----------|------------|------------|-------|---------|
| Under 10     | 93.2%  | 88.3%  | 92.3%    | 93.5%   | 91.2%    | 92.1%      | 91.1%      | 91.9% | 91.0%   |
| 10 - 19      | 3.0%   | 5.7%   | 4.5%     | 3.1%    | 5.0%     | 4.0%       | 5.0%       | 4.2%  | 4.7%    |
| 20 - 49      | 2.7%   | 3.6%   | 2.2%     | 2.4%    | 2.5%     | 2.7%       | 2.5%       | 2.6%  | 2.8%    |
| 50 - 249     | 1.0%   | 1.9%   | 0.8%     | 0.9%    | 1.1%     | 1.0%       | 1.2%       | 1.1%  | 1.3%    |
| 250 and over | 0.1%   | 0.5%   | 0.1%     | 0.1%    | 0.2%     | 0.1%       | 0.2%       | 0.1%  | 0.2%    |

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

Table 5 shows the data on companies employing over 50 persons by region for 2011. With the exception of agriculture, in all sectors, Dublin's share of enterprises employing over 50 persons was the largest. Its share was particularly high in the ICT, finance and professional services sectors. In almost all sectors, the lowest share of enterprises employing over 50 persons was in the Midland region.

Table 5. Number of companies employing over 50 employees, 2011

| Sector                                | Border | Dublin | Mid East | Midland | Mid West | South West | South East | West | Ireland |
|---------------------------------------|--------|--------|----------|---------|----------|------------|------------|------|---------|
| Agriculture                           |        | 1      | 5        |         | 1        | 1          | 9          |      | 17      |
| Industry (incl. energy and utilities) | 108    | 178    | 78       | 49      | 79       | 120        | 98         | 64   | 774     |
| Construction                          | 7      | 44     | 16       | 7       | 10       | 15         | 12         | 14   | 125     |
| Wholesale & retail                    | 23     | 264    | 42       | 24      | 38       | 94         | 40         | 36   | 561     |
| Transport & Storage                   | 7      | 82     | 6        | 2       | 9        | 15         | 12         | 7    | 140     |
| Accomm. & food                        | 31     | 118    | 26       | 12      | 22       | 66         | 37         | 39   | 351     |
| ICT                                   | 6      | 145    | 1        | 3       | 13       | 22         | 3          | 12   | 205     |
| Financial                             | 3      | 158    | 3        | 2       | 3        | 12         | 3          | 9    | 193     |
| Professional activities               | 2      | 108    | 6        | 3       | 15       | 27         | 4          | 8    | 173     |
| Admin. and support                    | 8      | 94     | 14       | 3       | 14       | 27         | 8          | 5    | 173     |
| PAD                                   | 17     | 88     | 12       | 9       | 20       | 13         | 14         | 9    | 182     |
| Education                             | 29     | 111    | 22       | 13      | 25       | 45         | 36         | 13   | 294     |
| Health                                | 36     | 95     | 23       | 18      | 29       | 45         | 23         | 26   | 295     |
| Other                                 | 2      | 81     | 5        | 1       | 5        | 4          | 4          | 3    | 105     |
| Total                                 | 279    | 1567   | 259      | 146     | 283      | 506        | 303        | 245  | 3588    |

Source: Data Ireland database

Table 6 presents employment in manufacturing by technology intensity type and sector for quarter 1 2012. Of just over 200,000 persons employed in manufacturing in quarter 1 2012, the highest share (18%) was in the South-West region. Although Dublin accounted for 16% of the total manufacturing employment, its share in high tech manufacturing was 23%, employing almost 12,000 persons. Combined with the Mid East and South West, these three regions accounted for over 60% of high tech manufacturing employment in Ireland.

At 5% each, the share of high tech manufacturing employment was the lowest in the Midland and Border regions.

Table 6. Employment in manufacturing by technology type by region, q1 2012

|              | Border        | Dublin        | Mid East      | Midland       | Mid West      | South East    | South West    | West          | Ireland        |
|--------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| High tech    | 2,400         | 11,900        | 10,000        | 2,700         | 4,900         | 5,100         | 10,800        | 5,000         | 52,700         |
| Medium-high  | 3,700         | 3,900         | 3,300         | 2,200         | 3,900         | 5,100         | 4,300         | 10,800        | 37,300         |
| Medium-low   | 4,600         | 3,300         | 4,800         | 3,600         | 5,400         | 6,200         | 4,900         | 3,100         | 35,900         |
| Low tech     | 11,500        | 13,900        | 9,000         | 3,900         | 7,400         | 11,300        | 16,100        | 7,200         | 80,300         |
| <b>Total</b> | <b>22,200</b> | <b>33,100</b> | <b>27,200</b> | <b>12,400</b> | <b>21,500</b> | <b>27,700</b> | <b>36,100</b> | <b>26,100</b> | <b>206,200</b> |
| High tech    | 5%            | 23%           | 19%           | 5%            | 9%            | 10%           | 20%           | 9%            | 100%           |
| Medium-high  | 10%           | 10%           | 9%            | 6%            | 10%           | 14%           | 12%           | 29%           | 100%           |
| Medium-low   | 13%           | 9%            | 13%           | 10%           | 15%           | 17%           | 14%           | 9%            | 100%           |
| Low tech     | 14%           | 17%           | 11%           | 5%            | 9%            | 14%           | 20%           | 9%            | 100%           |
| <b>Total</b> | <b>11%</b>    | <b>16%</b>    | <b>13%</b>    | <b>6%</b>     | <b>10%</b>    | <b>13%</b>    | <b>18%</b>    | <b>13%</b>    | <b>100%</b>    |

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

In 2010, the value of industrial output in Ireland was 96.6 billion euro (Table 7). Over one third of this value was produced in South West and almost one fifth in Dublin. The Midland's share of the industrial output value was the lowest, at 3%.

The value of the industrial output in the modern sector was 56.8 billion euro. Over 40% of this value was produced in South West and almost one quarter in Dublin. The shares produced in Border and Midland were the lowest, at 2% and 1% respectively.

Table 7. Gross output in industrial local units by region, 2010 (Euro billion and %)

| Sector                | Border     | Dublin      | Mid East   | Midland    | Mid West   | South East | South West  | West       | Ireland     |
|-----------------------|------------|-------------|------------|------------|------------|------------|-------------|------------|-------------|
| Modern sector         | 1.1        | 13.6        | 4.1        | 0.5        | 4.0        | 5.2        | 24.2        | 3.8        | 56.8        |
| Traditional sector    | 4.1        | 5.2         | 3.1        | 2.0        | 2.8        | 3.3        | 10.2        | 5.8        | 39.8        |
| <b>Industry total</b> | <b>5.2</b> | <b>18.8</b> | <b>7.2</b> | <b>2.5</b> | <b>6.8</b> | <b>8.5</b> | <b>34.5</b> | <b>9.6</b> | <b>96.6</b> |
| Modern sector         | 2%         | 24%         | 7%         | 1%         | 7%         | 9%         | 43%         | 7%         | 100%        |
| Traditional sector    | 10%        | 13%         | 8%         | 5%         | 7%         | 8%         | 26%         | 15%        | 100%        |
| <b>Industry total</b> | <b>5%</b>  | <b>19%</b>  | <b>8%</b>  | <b>3%</b>  | <b>7%</b>  | <b>9%</b>  | <b>36%</b>  | <b>10%</b> | <b>100%</b> |

Source: CSO (Census of Industrial Production)

Note: Industry includes mining, manufacturing, energy and utilities sectors; traditional sector: NACE (Rev.2) 05 to 17,181,19,22 to 25,28 to 31,321 to 324,329,33,35 to 39; Modern sector: NACE (REV.2) 20,21,26,27,182,325

## Occupational employment

Table 8 presents regional employment by occupational group for quarter 1 2012. Of the 1.79 million persons in employment in Ireland in quarter 1 2012, one in two were white collar workers: managers, professionals, associate professionals and clerks. At 60%, the share of white collar workers was highest in Dublin, while the shares in the Border, Midland and South East were less than 45%. Similarly, 23% of employment in Dublin was in professional occupations, compared with 16% in the Border and South East. By contrast, craftpersons accounted for 8% of the total employment in the Dublin region, while in all other regions, except the Mid East, the share was more than double that.

Table 8. Regional employment by occupational group (000s), q1 2012

| Row Labels      | Border | Dublin | Mid East | Midland | Mid West | South East | South West | West  | Ireland |
|-----------------|--------|--------|----------|---------|----------|------------|------------|-------|---------|
| Managers        | 11.3   | 47.4   | 23.2     | 6.4     | 12.1     | 14.0       | 20.0       | 11.3  | 145.7   |
| Professionals   | 26.6   | 114.9  | 46.3     | 16.1    | 23.1     | 27.9       | 47.7       | 30.8  | 333.4   |
| Associate prof. | 13.6   | 76.6   | 35.9     | 10.3    | 16.4     | 17.5       | 26.3       | 18.9  | 215.5   |
| Clerks          | 18.0   | 65.8   | 28.9     | 11.7    | 17.7     | 17.6       | 27.5       | 18.4  | 205.6   |
| Craftpersons    | 32.0   | 39.7   | 31.5     | 19.0    | 27.2     | 34.6       | 43.5       | 31.1  | 258.7   |
| Service workers | 18.2   | 36.1   | 16.5     | 8.8     | 10.8     | 17.0       | 20.3       | 13.7  | 141.5   |
| Sales workers   | 14.3   | 43.2   | 19.9     | 8.6     | 13.2     | 13.9       | 23.7       | 13.8  | 150.7   |
| Operatives      | 16.6   | 27.5   | 15.2     | 9.7     | 13.9     | 19.5       | 22.4       | 19.3  | 144.1   |
| Labourers       | 21.8   | 50.1   | 19.7     | 11.2    | 13.6     | 22.5       | 29.1       | 17.0  | 185.0   |
| Grand Total     | 172.9  | 503.8  | 237.4    | 102.3   | 148.7    | 184.5      | 261.1      | 175.4 | 1786.1  |

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

While the Dublin region accounted for less than 30% of national employment, its share in national employment of white collar workers was over 30%. Moreover, when Dublin and the Mid East are combined, one in two managers, professionals and associate professionals were working in the greater Dublin area. By contrast, Dublin had a comparatively lower share in the employment of craft workers and operatives.

## Vacancies

Despite a difficult economic situation in the labour market, vacancies continued to arise during 2012. In the first nine months of 2012, almost 50,000 vacancies were advertised on DSP/FÁS Jobs Ireland internet portal (Table 9).

Although the highest number of vacancies was advertised for the Dublin region, the occupational distributions of vacancies did not vary significantly across regions. In all regions, most vacancies were advertised for associate professionals (many in sales), labourers and personal service workers. The share of vacancies for managers, professionals, clerks and operatives was much lower, accounting for less than 10% each in all regions. (This could also be a consequence of the occupational bias in advertising, as many employers recruiting for these positions use advertising channels other than Jobs Ireland).

While the Dublin region accounted for 38% of the total number of advertised vacancies, its share of vacancies for white collar workers was greater, with 45% of all vacancies for professionals advertised for the Dublin region.

Table 9. Number of vacancies by occupational group and region, Jan-Sept 2012

| Occupation    | Border       | Dublin        | Mid East     | Midland      | Mid West     | South East   | South West   | West         | Ireland       |
|---------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Managers      | 82           | 407           | 72           | 59           | 61           | 72           | 145          | 71           | 969           |
| Professionals | 276          | 1,218         | 203          | 103          | 146          | 124          | 305          | 244          | 2,619         |
| Assoc. prof.  | 733          | 4,437         | 918          | 414          | 584          | 903          | 1,389        | 561          | 9,939         |
| Clerks        | 256          | 1,360         | 232          | 126          | 198          | 147          | 476          | 239          | 3,034         |
| Craft         | 563          | 1,566         | 563          | 382          | 371          | 469          | 907          | 483          | 5,304         |
| Personal etc. | 821          | 2,828         | 787          | 376          | 306          | 603          | 1,323        | 558          | 7,602         |
| Sales         | 875          | 1,904         | 670          | 436          | 364          | 831          | 822          | 332          | 6,234         |
| Operatives    | 263          | 1,156         | 442          | 158          | 155          | 304          | 431          | 194          | 3,103         |
| Labourers     | 724          | 3,436         | 971          | 510          | 777          | 854          | 1,549        | 630          | 9,451         |
| <b>Total</b>  | <b>4,593</b> | <b>18,312</b> | <b>4,860</b> | <b>2,564</b> | <b>2,962</b> | <b>4,307</b> | <b>7,347</b> | <b>3,312</b> | <b>48,257</b> |

Source: DSP/FÁS Jobs Ireland database

## Sourcing from outside the European Economic Area (EEA)

The data on employment permits issued to non-EEA workers in 2011 suggests that some vacancies are proving difficult to fill from the Irish labour supply<sup>3</sup>. Over 3,000 new employment permits were issued to non-EEA workers in 2011 (Table 10). New employment permits were issued in all regions; however, the numbers issued were relatively small - of one-digit magnitude in many occupations and for many regions. In most regions, the greatest share of employment permits was issued for health occupations and IT specialists. Most employment permits were issued for the Dublin region.

Table 10. Number of employment permits by occupation and region, 2011

|                | Border     | Dublin       | Mid East   | Midland    | Mid West   | South East | South West | West       | Ireland      |
|----------------|------------|--------------|------------|------------|------------|------------|------------|------------|--------------|
| Business prof. | 3          | 255          | 3          | 0          | 6          | 2          | 14         | 2          | 285          |
| Butchers       | 3          | 6            | 12         | 3          | 2          | 3          | 3          | 0          | 32           |
| Catering       | 10         | 50           | 24         | 6          | 8          | 22         | 12         | 8          | 140          |
| IT             | 23         | 377          | 20         | 166        | 29         | 5          | 46         | 32         | 698          |
| Health         | 54         | 237          | 73         | 24         | 82         | 34         | 124        | 77         | 705          |
| Managers       | 6          | 183          | 13         | 2          | 11         | 4          | 21         | 11         | 251          |
| Engineers      | 4          | 61           | 29         | 9          | 9          | 2          | 13         | 8          | 135          |
| Food trades    | 3          | 39           | 7          | 1          | 6          | 6          | 4          | 5          | 71           |
| Other          | 33         | 457          | 85         | 25         | 73         | 39         | 84         | 43         | 839          |
| <b>Total</b>   | <b>139</b> | <b>1,665</b> | <b>266</b> | <b>236</b> | <b>226</b> | <b>117</b> | <b>321</b> | <b>186</b> | <b>3,156</b> |

Source: DJEI

Note: Figures do not include a small number of new work permits for which NUTS3 region was, for various reasons, not assignable

<sup>3</sup> When interpreting employment permit data, it should be noted that the number of work permits issued for most occupations represents an over-estimation of the true annual inflow of non-EEA, Romanian and Bulgarian 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, a new permit is issued rather than the old permit being renewed.

## Replacement demand

Given the expected slow economic and employment recovery in the short term, replacement demand - demand arising from retirements and other exits from employment (excluding vacancies arising from turnover within an occupation) - will continue to be the main source of employment opportunities in many occupations. Based on the employment levels in quarter 1 2012 and a conservative annual replacement rate of 2%<sup>4</sup>, it is estimated that the employment opportunities arising from replacement demand will be approximately 35,000 per annum (Table 11). Employment opportunities will arise in all regions and across all occupational groups. In some occupational groups (e.g. sales, labourers) the replacement demand presented here is likely to be an underestimation of the demand, given that these occupations typically have higher exits and thus higher replacement rates.

Table 11. Estimated replacement demand by occupational group and region, q1 2012

| Row Labels      | Border       | Dublin        | Mid East     | Midland      | Mid West     | South East   | South West   | West         | Ireland       |
|-----------------|--------------|---------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Managers        | 200          | 900           | 500          | 100          | 200          | 300          | 400          | 200          | 2,900         |
| Professionals   | 500          | 2,300         | 900          | 300          | 500          | 600          | 1,000        | 600          | 6,700         |
| Associate prof. | 300          | 1,500         | 700          | 200          | 300          | 400          | 500          | 400          | 4,300         |
| Clerks          | 400          | 1,300         | 600          | 200          | 400          | 400          | 600          | 400          | 4,100         |
| Craftpersons    | 600          | 800           | 600          | 400          | 500          | 700          | 900          | 600          | 5,200         |
| Service workers | 400          | 700           | 300          | 200          | 200          | 300          | 400          | 300          | 2,800         |
| Sales workers   | 300          | 900           | 400          | 200          | 300          | 300          | 500          | 300          | 3,000         |
| Operatives      | 300          | 600           | 300          | 200          | 300          | 400          | 400          | 400          | 2,900         |
| Labourers       | 400          | 1,000         | 400          | 200          | 300          | 500          | 600          | 300          | 3,700         |
| <b>Total</b>    | <b>3,500</b> | <b>10,100</b> | <b>4,700</b> | <b>2,000</b> | <b>3,000</b> | <b>3,700</b> | <b>5,200</b> | <b>3,500</b> | <b>35,700</b> |

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

Note: Estimates based on 2% annual attrition rate and q1 2012 employment levels

<sup>4</sup>The annual replacement rate varies according to occupation; for example, it may be as low as 2.5% for professional occupations or up to 3.9% for labourers (FÁS/ESRI Manpower Forecasting Studies. Report No. 9. Estimating Labour Force Flows, Job Openings and Human Resource Requirements. April 2001). During a recession, replacement rates are likely to be lower and therefore a conservative estimate of 2% was used here.

## Employment growth - trends and expected expansion demand

Employment trends by sector are often used to indicate expected future employment growth. For this reason, we look at the employment change by sector in the previous four years. Given that the most recent trend is associated with the recession, we also contrast it by presenting data for the boom years, namely quarter 1 2004 to quarter 1 2008. In addition, to identify any growth areas in more recent times, we look at the period quarter 1 2011 to quarter 1 2012.

### Employment change 2004-2008

Between quarter 1 2004 and quarter 1 2008, employment in Ireland increased by almost 300,000 (Table 12). Employment growth was recorded in each region, with the highest increases in absolute terms, recorded in Dublin, the Mid East and South West of 73,000, 51,000 and 43,000 respectively. The smallest increase was recorded in the Mid West - 15,000. In relative terms, the greatest increases were in the Mid East, Midland and South East (25%, 20% and 19%).

In each region, the strongest employment growth, in absolute terms, was recorded in the construction, wholesale/retail and healthcare sectors. In relative terms, growth in construction employment was strongest in the Border and Dublin regions, where the numbers employed increased by 50% over the four year period. Growth in retail employment was strongest in the Midland, South East and Mid East, increasing by at least a third in each of these regions. In Dublin, in absolute terms, strong growth was also observed in the financial services sector (+12,000), while in relative terms, employment in administrative services increased strongly by almost 40%.

Table 12. Employment change by sector and region (000s), Q1 2004 - Q1 2008

| Row Labels   | Border    | Dublin    | Mid East  | Midland   | Mid West  | South East | South West | West      | Ireland    |
|--|-----------|-----------|-----------|-----------|-----------|------------|------------|-----------|------------|
| Agriculture, forestry and fishing                                    | -1        | *         | 5         | 1         | -1        | *          | -2         | -1        | 2          |
| Industry   | -4        | -7        | 3         | *         | -2        | -2         | -2         | *         | -15        |
| Construction   | 11        | 19        | 7         | 3         | 5         | 9          | 6          | 5         | 64         |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 6         | 7         | 10        | 5         | 3         | 9          | 8          | 6         | 54         |
| Transportation and storage   | 3         | -3        | 2         | 1         | 2         | 1          | 1          | *         | 6          |
| Accommodation and food service activities                            | 3         | 2         | 2         | 2         | 1         | 1          | 8          | 2         | 20         |
| Information and communication  | 2         | 4         | 3         | 1         | 1         | *          | 3          | -2        | 11         |
| Financial, insurance and real estate activities                      | 2         | 12        | 2         | 1         | -1        | *          | 2          | *         | 17         |
| Professional, scientific and technical activities                    | 1         | 6         | 2         | 2         | 1         | 2          | 1          | 2         | 18         |
| Administrative and support service activities                        | 4         | 9         | 2         | 1         | 2         | 2          | 5          | 2         | 27         |
| Public administration and defence; compulsory social security        | 1         | 3         | 1         | 2         | 2         | 2          | 2          | 4         | 18         |
| Education  | 1         | *         | 5         | 2         | 1         | 1          | 4          | 3         | 18         |
| Human health and social work activities                              | 3         | 19        | 5         | 1         | 3         | 7          | 6          | 4         | 47         |
| Other NACE activities  | 1         | 2         | 3         | *         | -1        | 2          | *          | 2         | 8          |
| <b>Total</b>   | <b>30</b> | <b>73</b> | <b>51</b> | <b>21</b> | <b>16</b> | <b>35</b>  | <b>43</b>  | <b>26</b> | <b>295</b> |

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

Sectoral distributions of employment growth were broadly similar across regions, although the magnitude of growth differed. In each region, agriculture and industry accounted for the lowest (if any) share in the regional employment increase. By contrast, construction, healthcare and retail accounted for the greatest shares of employment increase in each region.

### Employment change 2008-2012

Between quarter 1 2008 and quarter 1 2012, employment in Ireland decreased by almost 340,000 (Table 13). Over this period, employed declined in each region, with the most pronounced decreases, in absolute terms, recorded in the Dublin, Border, South West and South East regions, at -117,000, -47,000, -44,000 and -38,000 respectively. The smallest decline was recorded in the Mid East (less than 20,000). In each region, the decline observed over this period was greater than the increase observed over the period quarter 1 2004 to quarter 1 2008. In relative terms, the greatest decline was recorded in the Border and Dublin regions (one fifth each), followed by the Midland and South East (18% and 17% respectively).

In each region, the greatest decline in employment, in absolute terms, was recorded in construction. The decline in construction employment in each region over this period was greater than the increase in the period quarter 1 2004 to quarter 1 2008. In most regions, large employment declines were also recorded in retail, industry and agriculture, although of the lesser magnitude than in construction.

Table 13. Employment change by sector and region (000s), Q1 2008 - Q1 2012

| Row Labels   | Border | Dublin | Mid East | Midland | Mid West | South East | South West | West | Ireland |
|--|--------|--------|----------|---------|----------|------------|------------|------|---------|
| Agriculture, forestry and fishing                                    | -4     | 1      | -7       | -3      | -4       | -4         | -8         | -6   | -35     |
| Industry   | -7     | -19    | -6       | -4      | -6       | -4         | -7         | 1    | -50     |
| Construction   | -20    | -36    | -17      | -9      | -11      | -21        | -19        | -16  | -149    |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | -7     | -22    | *        | -3      | -5       | -7         | -2         | -5   | -51     |
| Transportation and storage   | -1     | -3     | -1       | -1      | *        | *          | *          | *    | -5      |
| Accommodation and food service activities                            | -2     | -9     | -2       | -2      | *        | *          | -2         | -2   | -19     |
| Information and communication  | -1     | *      | 2        | *       | 1        | 1          | *          | 2    | 4       |
| Financial, insurance and real estate activities                      | -4     | -7     | 4        | *       | 3        | *          | -1         | 2    | -4      |
| Professional, scientific and technical activities                    | -2     | -7     | -1       | -2      | *        | -1         | -2         | -1   | -15     |
| Administrative and support service activities                        | -2     | -12    | *        | *       | -2       | -2         | -3         | -1   | -22     |
| Public administration and defence; compulsory social security        | 2      | -5     | *        | *       | 2        | *          | *          | -1   | -3      |
| Education  | 1      | 4      | *        | 1       | -2       | 3          | -1         | 1    | 7       |
| Human health and social work activities                              | *      | 1      | 8        | 1       | 1        | 1          | 3          | *    | 14      |
| Other NACE activities  | -1     | *      | 1        | 1       | 2        | -3         | -2         | -1   | -2      |
| Grand Total  | -47    | -117   | -19      | -22     | -23      | -38        | -44        | -28  | -338    |

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

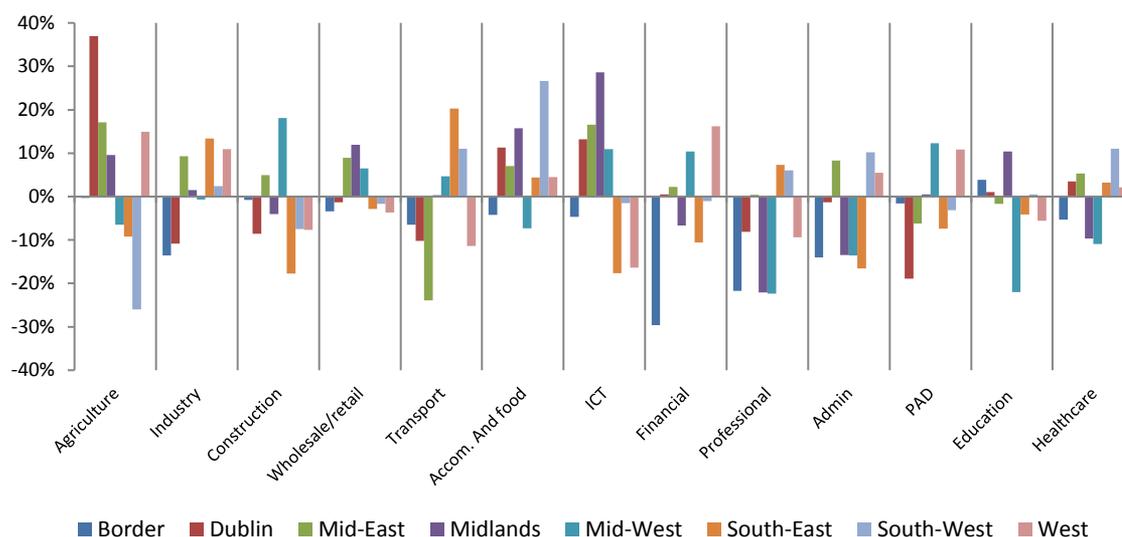
Sectoral distributions of employment decline were broadly similar across regions, although the absolute and relative magnitudes of decline differed. In each region, construction accounted for the greatest share in regional employment decrease. This was followed, in most regions, by and wholesale/retail, industry and agriculture.

## Employment change 2011-2012

Between quarter 1 2011 and quarter 1 2012, employment levels remained relatively stable in the Midland, South West and West; in the Border, Mid West, South East and Dublin regions employment declined although at a lower rate than previously observed; employment increased in the Mid East and South West.

In each region, employment growth varied across sectors. Moreover, sectoral performance varied across regions. For instance, industrial employment declined by over 10% in the Border and Dublin regions, while increases of similar magnitudes were observed in the South East and West. Similar differences in performance in terms of employment growth were observed for most sectors.

Figure 1. Employment growth by sector and region (%), Q1 2011 - Q1 2012



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

Note: In Dublin, the level of agricultural employment is less than 2,000; statistical inferences based on such small numbers are associated with greater risk of sampling errors.

## Occupational prospects

Table 14 presents a list of occupations with a lower than average unemployment rate and/or expected higher than average medium term employment growth rate. The list is intended to indicate areas in which job opportunities are expected to be greater than elsewhere. An indication of the level of education of the persons currently employed in these occupations is also provided, by stating the share of third level graduates. The level of education is intended as an indicative guide for education and training provision aimed as providing supply for these occupations. The numbers employed in each occupation are provided to contextualise the relative magnitude (hundreds or thousands) of job opportunities which may arise through potential replacement and expansion demand.

Table 14. Selected occupations with positive labour market outlook, Ireland

| Occupation  | Number Employed | % Third Level Graduates | Unemployment  | Employment growth prospect |
|---|-----------------|-------------------------|---------------|----------------------------|
| Other drivers & transport operatives                        | 5200            | 14%                     | Below average | n/a                        |
| Chemical & related process operatives                       | 7500            | 22%                     | Below average | Above average              |
| Caring personal services occupations                        | 10700           | 23%                     | Below average | Above average              |
| Protective service occupations                              | 7900            | 27%                     | Below average | Above average              |
| Nursery nurses & assistants                                 | 4900            | 29%                     | Below average | n/a                        |
| Metal machining, fitting & instrument making trades         | 21100           | 32%                     | Below average | Above average              |
| Care workers, home carers etc.                              | 50000           | 32%                     | Below average | Above average              |
| Customer service occupations                                | 16000           | 43%                     | Below average | Above average              |
| Financial admin. occupations                                | 61500           | 46%                     | Below average | Above average              |
| Business sales executives                                   | 20000           | 50%                     | Below average | Above average              |
| Electrical, electronic & engineering technicians            | 5100            | 52%                     | Below average | Above average              |
| Vocational & industrial trainers & instructors              | 7900            | 64%                     | Below average | n/a                        |
| Sports & fitness occupations                                | 6900            | 67%                     | Below average | Above average              |
| IT operations technicians                                   | 8000            | 67%                     | Below average | Above average              |
| Laboratory technicians                                      | 6900            | 68%                     | Below average | Above average              |
| Production managers in manufacturing, mining & energy       | 11400           | 68%                     | Below average | n/a                        |
| Health associate professionals                              | 9600            | 70%                     | Below average | n/a                        |
| Brokers & insurance underwriters                            | 5200            | 71%                     | Below average | n/a                        |
| Advertising, marketing, sales directors                     | 4300            | 72%                     | Below average | n/a                        |
| Web designers & developers                                  | <3000           | 72%                     | n/a           | Above average              |
| Sales accounts & bus. dev. managers                         | 17400           | 72%                     | Below average | Above average              |
| Financial accounts managers                                 | 7100            | 73%                     | Below average | Above average              |
| IT user support technicians                                 | <3000           | 77%                     | n/a           | Above average              |
| Financial & accounting technicians                          | 4100            | 77%                     | Below average | Above average              |
| Human resource managers & directors                         | 4100            | 79%                     | Below average | Above average              |
| ICT, specialist & project managers                          | 12900           | 81%                     | Below average | Above average              |
| Process & quality assurance technicians                     | 3200            | 82%                     | n/a           | Above average              |
| Teaching & other educational professionals                  | 15300           | 85%                     | Below average | n/a                        |
| Electrical & electronic engineers                           | <3000           | 86%                     | n/a           | Above average              |
| Marketing associate professionals                           | 4500            | 88%                     | Below average | Above average              |
| ICT professionals n.e.c.                                    | 6900            | 88%                     | Below average | Above average              |
| Finance & investment analysts & advisers                    | 6600            | 88%                     | Below average | n/a                        |
| Engineering professionals n.e.c.                            | 4000            | 89%                     | Below average | Above average              |
| Mgt. consultants, business analysts & project managers      | 6800            | 90%                     | Below average | Above average              |
| IT business analysts & systems designers                    | <3000           | 91%                     | n/a           | Above average              |
| Production, process, design & development engineers         | 3800            | 91%                     | n/a           | Above average              |
| Actuaries, economists & statisticians; other business prof. | 6000            | 91%                     | Below average | Above average              |
| Programmers & software developers                           | 14800           | 93%                     | Below average | Above average              |
| Other natural & social scientists; R&D managers             | 6000            | 94%                     | Below average | Above average              |
| Quality control engineers; other regulatory professionals   | 3800            | 96%                     | n/a           | Above average              |
| Accountants & tax experts                                   | 34300           | 96%                     | Below average | Above average              |
| Other health professionals n.e.c.                           | 10000           | 97%                     | Below average | n/a                        |
| Chemical, biological & physical scientists                  | 8100            | 98%                     | Below average | Above average              |

Source: Analysis by FÁS (SLMRU) based on CSO data and FÁS/ESRI Occupational Employment Forecasts 2015

## **Job announcements**

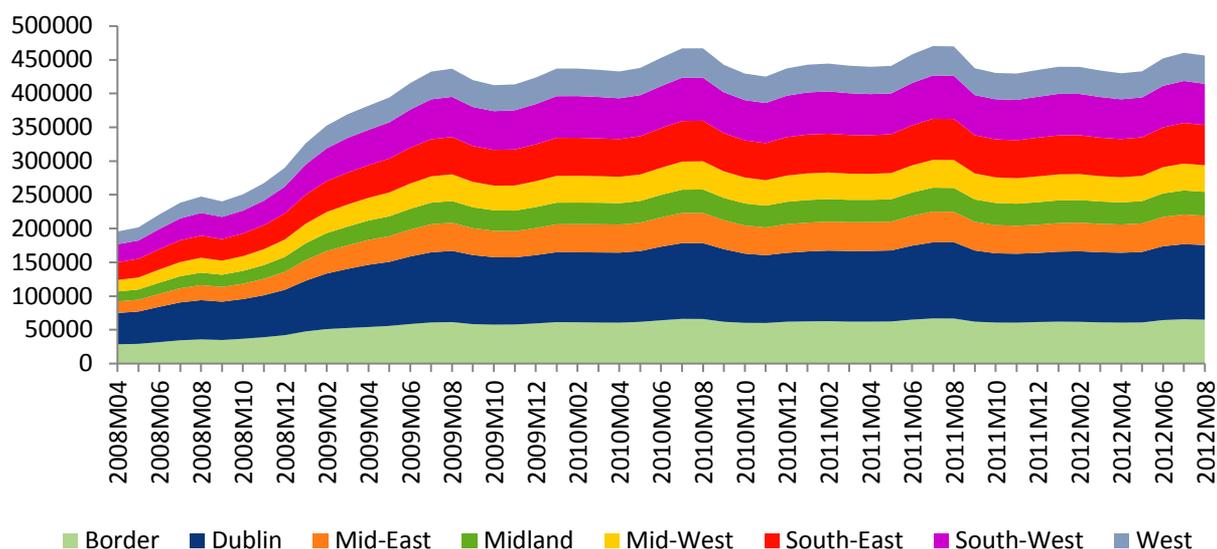
Monitoring of recent announcements in the media suggests that job creation continues despite difficulties in the Irish labour market, with job creation announcements throughout 2011 and the first three quarters of 2012 exceeding the number of announcements of job losses. Although there have been job announcements for all regions, most job announcements have been for the Dublin region, followed by the South West region.

## Live Register

Although not an official measure of unemployment, the number of persons registering for unemployment assistance and other statutory entitlements with the Department of Social Protection (Live Register) provides an indication of trends in unemployment. In August 2012, there were 456,000 persons on the Live Register. One in four were located in the Dublin region.

The numbers on the Live Register have increased in all regions since early 2008. Since mid 2010, the numbers on the Live Register in each region have remained relatively stable at a level significantly higher than those observed prior to the crisis. There is a pronounced seasonality in the numbers signing on the Live Register in each region, with numbers increasing in each region (by approximately 5%) during the summer months and declining in September every year.

Figure 2. Persons on Live Register by region



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

The age distributions of persons on the Live Register were broadly similar across regions (Table 15). In each region, the share of persons aged under 25 on the Live Register ranged between 17% and 19%. The highest share of under-25s on the Live Register (19%) was in the Midland and Border regions.

Table 15. Live Register by age group and region, August 2012

| Age               | Border        | Dublin         | Mid East      | Midland       | Mid West      | South East    | South West    | West          | State          |
|-------------------|---------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Under 25 years    | 12,454        | 19,264         | 7,317         | 6,659         | 6,893         | 10,992        | 9,608         | 7,164         | 80,351         |
| 25 years and over | 52,527        | 91,317         | 36,074        | 28,695        | 32,474        | 48,630        | 51,470        | 34,718        | 375,905        |
| <b>Total</b>      | <b>64,981</b> | <b>110,581</b> | <b>43,391</b> | <b>35,354</b> | <b>39,367</b> | <b>59,622</b> | <b>61,078</b> | <b>41,882</b> | <b>456,256</b> |

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

The gender distributions of persons on the Live Register were broadly similar across the regions (Table 16). Males accounted for over 60% in each region, with the highest share of males recorded in Dublin (65%).

Table 16. Number of persons on the Live Register by gender and region, August 2012

| Gender       | Border        | Dublin         | Mid East      | Midland       | Mid West      | South East    | South West    | West          | State          |
|--------------|---------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Male         | 40,525        | 71,368         | 26,900        | 21,899        | 24,417        | 37,483        | 38,449        | 25,584        | 286,625        |
| Female       | 24,456        | 39,213         | 16,491        | 13,455        | 14,950        | 22,139        | 22,629        | 16,298        | 169,631        |
| <b>Total</b> | <b>64,981</b> | <b>110,581</b> | <b>43,391</b> | <b>35,354</b> | <b>39,367</b> | <b>59,622</b> | <b>61,078</b> | <b>41,882</b> | <b>456,256</b> |

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

## Official unemployment

In this section Quarterly National Household Survey (QNHS) data is used to report on the official unemployment statistics. While the Live Register data is frequently mentioned in discussions on unemployment, it is not specifically designed to measure unemployment.

Table 17 presents unemployment by sector and region for quarter 1 2012. The sectoral distributions of unemployment across regions were broadly similar. Of 309,000 unemployed persons in quarter 1 2012, one in four had previously been employed in the construction sector. In each region, the share of unemployed persons previously employed in construction was higher than for any other sector. Similarly, in each region, persons previously employed in industry and wholesale/retail accounted for over 10% each.

Table 17. Unemployment by sector and region, (000s) q1 2012

| Sector  | Border      | Dublin      | Mid East    | Midland     | Mid West    | South East  | South West  | West        | Ireland      |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|
| Agriculture, forestry and fishing                 | *           | *           | *           | *           | *           | 1.2         | *           | *           | 4.1          |
| Industry  | 4.8         | 8.6         | 3.5         | 3.2         | 5.0         | 5.4         | 4.3         | 4.5         | 39.4         |
| Construction                                      | 7.9         | 14.1        | 10.5        | 6.1         | 5.5         | 13.1        | 10.8        | 9.1         | 77.0         |
| Wholesale and retail trade; vehicle repair        | 3.7         | 9.6         | 3.8         | 3.5         | 3.3         | 4.9         | 5.5         | 4.0         | 38.5         |
| Transportation and storage                        | *           | 3.9         | 1.1         | *           | 1.2         | 1.4         | 1.2         | *           | 10.5         |
| Accommodation and food service activities         | 2.4         | 4.5         | 2.4         | 1.4         | 2.0         | 2.9         | 3.2         | 3.0         | 21.8         |
| Information and communication                     | *           | 2.4         | *           | *           | *           | 1.2         | *           | *           | 6.9          |
| Financial, insurance and real estate              | *           | 2.2         | *           | *           | *           | *           | *           | *           | 5.2          |
| Professional, scientific and technical activities | *           | 4.2         | 1.0         | *           | *           | 1.8         | 1.3         | *           | 11.7         |
| Admin. and support service activities             | 1.3         | 2.3         | 1.3         | *           | 1.1         | 1.8         | 1.9         | 1.0         | 11.2         |
| PAD   | *           | *           | *           | *           | *           | *           | *           | *           | 3.4          |
| Education   | *           | *           | *           | *           | *           | *           | *           | 1.1         | 6.5          |
| Human health and social work activities           | 2.0         | 3.4         | 1.4         | *           | 1.9         | 2.0         | 1.1         | 1.3         | 14.0         |
| Other NACE activities                             | *           | 4.4         | 1.4         | *           | 1.0         | 1.5         | 2.0         | 1.0         | 13.1         |
| No sector   | 3.1         | 13.5        | 4.9         | 2.9         | 4.4         | 6.5         | 5.9         | 4.5         | 45.7         |
| <b>Total</b>                                      | <b>30.5</b> | <b>75.8</b> | <b>34.0</b> | <b>22.7</b> | <b>28.0</b> | <b>45.3</b> | <b>39.8</b> | <b>33.1</b> | <b>309.0</b> |

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

Although Dublin accounted for one quarter of total national unemployment, its share in the total of unemployed persons who had previously worked in IT, transportation, professional and financial services was

higher than 30% for each of these sectors. Over 40% of all unemployed persons who had previously worked in the financial services sector were located in Dublin.

Table 18 shows unemployment by occupational group and region for quarter 1 2012. There was a pronounced similarity in the occupational distributions of the unemployed between regions. In each region, between one fifth and one quarter of unemployed persons had previously worked as craftpersons. The share of craftpersons amongst the unemployed was the highest in the South East and South West regions (27%), while it was lowest in Mid West (18%) and Dublin (19%). The share of labourers was between 15% and 20% in each region, with the highest in the Border, South East and South West (20% in each) and lowest in the Mid East (15%).

Although Dublin accounted for one quarter of total national unemployment, its share in the total of unemployed persons who had previously worked as professionals was much higher, at almost 40%. Similarly, the Mid East, which accounted for 11% of total national unemployment, accounted for almost one fifth of all unemployed managers.

Table 18. Unemployment by occupational group and region, (000s) Q1 2012

| Occupation    | Border | Dublin | Mid East | Midland | Mid West | South East | South West | West | Ireland |
|---------------|--------|--------|----------|---------|----------|------------|------------|------|---------|
| Managers      | *      | 2.3    | 1.7      | *       | *        | 1.5        | 1.4        | *    | 9.4     |
| Professionals | 1.0    | 5.3    | *        | *       | 1.1      | 1.3        | 1.7        | 1.6  | 13.7    |
| Assoc. prof.  | 1.2    | 4.8    | 1.9      | 1.4     | 1.7      | 1.8        | 1.7        | 2.3  | 16.9    |
| Clerks        | 2.1    | 5.0    | 2.5      | 1.0     | 2.1      | 2.6        | 2.1        | 2.0  | 19.3    |
| Craft         | 7.7    | 14.7   | 8.3      | 5.0     | 4.9      | 12.3       | 10.7       | 8.3  | 71.8    |
| Personal etc. | 2.1    | 3.7    | 2.2      | 1.2     | 2.2      | 1.9        | 2.0        | 1.3  | 16.6    |
| Sales         | 2.7    | 7.1    | 3.0      | 2.3     | 2.3      | 3.4        | 2.6        | 2.4  | 25.9    |
| Operatives    | 4.0    | 6.6    | 3.8      | 3.1     | 4.1      | 5.2        | 3.8        | 3.8  | 34.4    |
| Labourers     | 6.0    | 12.9   | 5.0      | 4.3     | 4.5      | 9.2        | 8.0        | 5.9  | 55.7    |
| No occupation | 3.2    | 13.3   | 4.9      | 3.0     | 4.4      | 6.2        | 5.8        | 4.5  | 45.3    |
| Total         | 30.5   | 75.8   | 34.0     | 22.7    | 28.0     | 45.3       | 39.8       | 33.1 | 309.0   |

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

In each region, persons holding higher secondary education accounted for the highest share of the unemployed in the region (one quarter to one third in the Midland) (Table 19). The share of unemployed holding third level honours degree or above was 15% or less in each region.

Of all unemployed persons in Ireland who hold lower secondary qualifications or less, the highest share was located in the South East and Midland region (36% each).

Table 19. Unemployment by education and region, (000s) Q1 2012

| Occupation                                 | Border    | Dublin    | Mid East  | Midland   | Mid West  | South East | South West | West      | Ireland    |
|--|-----------|-----------|-----------|-----------|-----------|------------|------------|-----------|------------|
| No formal/primary                          | 4         | 7         | 3         | 2         | 3         | 6          | 4          | 4         | 32         |
| Lower secondary                            | 6         | 17        | 7         | 6         | 5         | 10         | 8          | 5         | 65         |
| Higher secondary                           | 8         | 21        | 9         | 7         | 9         | 12         | 10         | 10        | 86         |
| Post leaving cert                          | 6         | 12        | 8         | 3         | 4         | 8          | 8          | 5         | 54         |
| 3 <sup>rd</sup> level non hons degree      | 3         | 7         | 3         | 2         | 2         | 4          | 4          | 3         | 29         |
| 3 <sup>rd</sup> level hons degree or above | 3         | 11        | 3         | 2         | 4         | 3          | 5          | 4         | 35         |
| Other/not stated                           | 1         | *         | 1         | *         | 1         | 2          | 1          | 2         | 8          |
| Not applicable                             | *         | *         | *         | *         | *         | *          | *          | *         | 1          |
| <b>Grand Total</b>                         | <b>31</b> | <b>76</b> | <b>34</b> | <b>23</b> | <b>28</b> | <b>45</b>  | <b>40</b>  | <b>33</b> | <b>309</b> |

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

### Job seekers with the Public Employment Service (PES)

Table 20 presents data on persons registered with the Public Employment Service (PES) who were seeking employment, in receipt of unemployment benefit (allowance or credits), with previous occupations and who were ready to take up employment in September 2012. There was a similarity in the occupational distributions of job seekers across regions. As with unemployment figures, the highest share of job seekers in each region had previously been employed as craftpersons or labourers (between one fifth and one quarter each). Less than 10% of job seekers in each region had previously worked as managers, professionals, personal service or sales workers.

Although Dublin accounted for one quarter of all job seekers registered with the DSP, its share amongst job seekers who had previously worked as managers, professionals and associate professionals was higher, at almost one third for each occupational group.

Table 20. Number of job seekers by occupational group and region, Sep 2012

| Occupation         | Border        | Dublin        | Mid East      | Midland       | Mid West      | South East    | South West    | West          | Grand Total    |
|--------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| Managers           | 327           | 1,099         | 473           | 160           | 259           | 351           | 315           | 255           | 3,239          |
| Professionals      | 1,107         | 2,898         | 936           | 402           | 837           | 1,074         | 1,281         | 1,069         | 9,604          |
| Assoc. prof.       | 1,875         | 5,425         | 1,886         | 742           | 1,408         | 1,876         | 2,063         | 1,636         | 16,911         |
| Clerks             | 2,338         | 5,430         | 2,358         | 1,072         | 1,853         | 2,586         | 2,280         | 1,775         | 19,692         |
| Craft              | 4,961         | 8,635         | 4,250         | 2,366         | 3,370         | 5,862         | 5,509         | 4,061         | 39,014         |
| Personal etc.      | 1,786         | 2,637         | 1,302         | 862           | 1,241         | 1,860         | 1,687         | 1,186         | 12,561         |
| Sales              | 1,694         | 3,952         | 1,553         | 1,006         | 1,253         | 2,100         | 1,939         | 1,341         | 14,838         |
| Operatives         | 3,602         | 6,559         | 2,910         | 1,866         | 3,131         | 4,453         | 3,708         | 2,889         | 29,118         |
| Labourers          | 5,380         | 9,178         | 3,811         | 2,539         | 3,622         | 6,288         | 5,276         | 3,769         | 39,863         |
| <b>Grand Total</b> | <b>23,070</b> | <b>45,813</b> | <b>19,479</b> | <b>11,015</b> | <b>16,974</b> | <b>26,450</b> | <b>24,058</b> | <b>17,981</b> | <b>184,840</b> |

Source: DSP/FAS Client database

## Supply from education and training system

The data on numbers of students enrolled in education and training provides an indication of the supply expected to emerge from the system over the short to medium term.

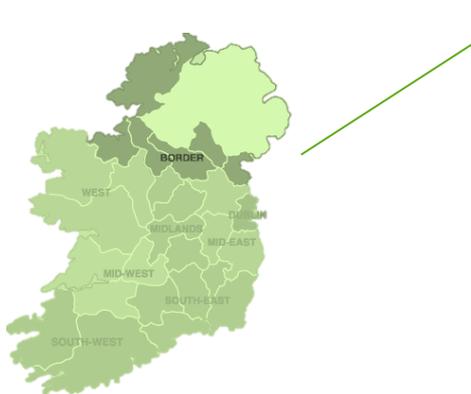
In 2011, almost 300,000 students were enrolled in courses across further and higher education in Ireland (Table 21). Each region provided courses at FET and higher education levels, although Dublin had the highest number of students enrolled in all levels observed, accounting for almost 40% of the total enrolments. Almost 60% of all national enrolments at postgraduate level were in Dublin. FÁS enrolments were somewhat more evenly distributed across regions, although Dublin accounted for almost 30% of the total.

Table 21. Number of students engaged in education and training by region, 2011

| Region        | Border        | Dublin         | Mid East      | Midland       | Mid West      | South East    | South West    | West          | Ireland        |
|---------------|---------------|----------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|
| FET (FAS)     | 9,583         | 16,734         |               | 6,963         | 5,748         | 7,612         | 7,943         | 3,677         | 58,260         |
| FET (PLC)     | 4,647         | 12,430         | 2,126         | 1,358         | 2,863         | 3,854         | 6,323         | 2,926         | 36,527         |
| Undergraduate | 12,110        | 62,199         | 6,469         | 4,439         | 17,189        | 11,869        | 24,813        | 19,244        | 158,332        |
| Postgraduate  | 725           | 19,835         | 1,853         | 446           | 2,893         | 951           | 4,304         | 3,725         | 34,732         |
| <b>Total</b>  | <b>27,065</b> | <b>111,198</b> | <b>10,448</b> | <b>13,206</b> | <b>28,693</b> | <b>24,409</b> | <b>43,383</b> | <b>29,572</b> | <b>287,851</b> |

Source: DES, HEA, FÁS

## 2. Border



|                     |         |
|---------------------|---------|
| Population          | 503,000 |
| Working age (15-64) | 326,000 |
| Labour force        | 203,000 |
| Employment          | 173,000 |
| Unemployment        | 31,000  |
| Unemployment rate   | 15.0%   |
| Participation rate  | 52.4%   |

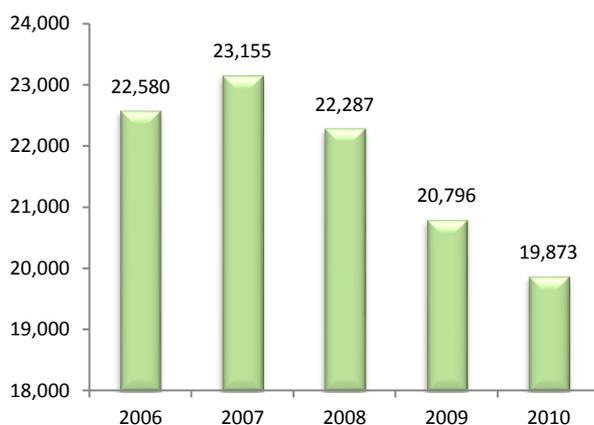
Figure 2.1 Employment by broad economic sector (Border region), Q1 2012

- In quarter 1 2012, the public sector was the largest employer in the Border region, with PAD, health and education combined employing almost 50,000 persons or over a quarter of the total workforce
- Outside the public sector, wholesale/retail and industry were the largest sectors accounting for 15% and 14% of region's employment respectively
- High value added sectors (professional, financial and IT activities) accounted for a combined share of 8% of the region's employment.



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

Figure 2.2 Active enterprises (excludes public sector & agriculture)

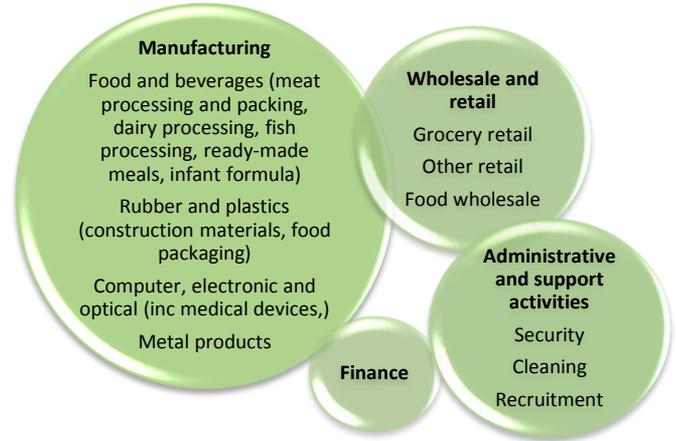


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, there were just fewer than 20,000 active enterprises outside agriculture and the public sector in the Border region
- 93% of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Between 2007 and 2010, the number of active enterprises declined by over 3,000
- Between 2009 and 2010, the number of active enterprises in construction declined by 700
- The largest number of active enterprises were in wholesale and retail and construction (approximately 5,000 in each).

Figure 2.3 Sectors with largest enterprises

- The highest number of medium to large enterprises (employing more than 50 persons) in the Border region is found in manufacturing and wholesale and retail
- There are also some medium to large enterprises in administrative and support services and financial activities.



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 2.4a Industrial units

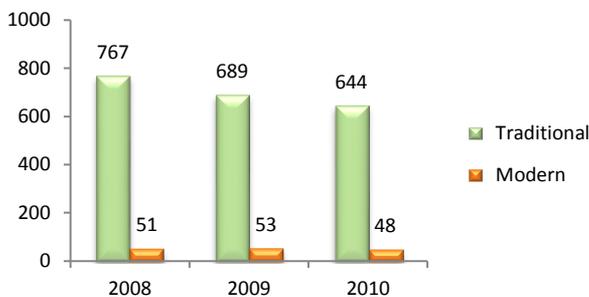
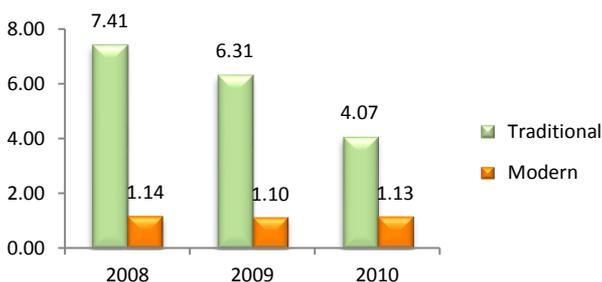


Figure 2.4b Gross output in industrial units (€ billion)

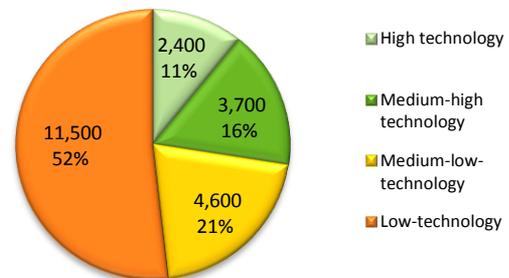


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 93% of all industrial units (manufacturing, energy and utilities) in the Border region were in the traditional sector
- While less than 7% of industrial units were in the modern industry sector, they produced over one fifth of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with traditional sector declining by a greater rate (16% compared to 6%)
- Although the number of industrial units declined, the value of gross output in the modern sector increased between 2009 and 2010, growing from €1.10 billion to €1.13 billion.

Figure 2.5 Manufacturing employment (Border), Q1 2 2012

- In quarter 1 2012, 22,000 persons in the Border region were employed in manufacturing
- Over 50% were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.); 20% were employed in low to medium-tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); medium to high tech (e.g. chemicals, electrical, transport equipment etc.) and high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) combined accounted for just over a quarter of employment.



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

Figure 2.6 Employment by broad occupation (Q1 2012, Border region)



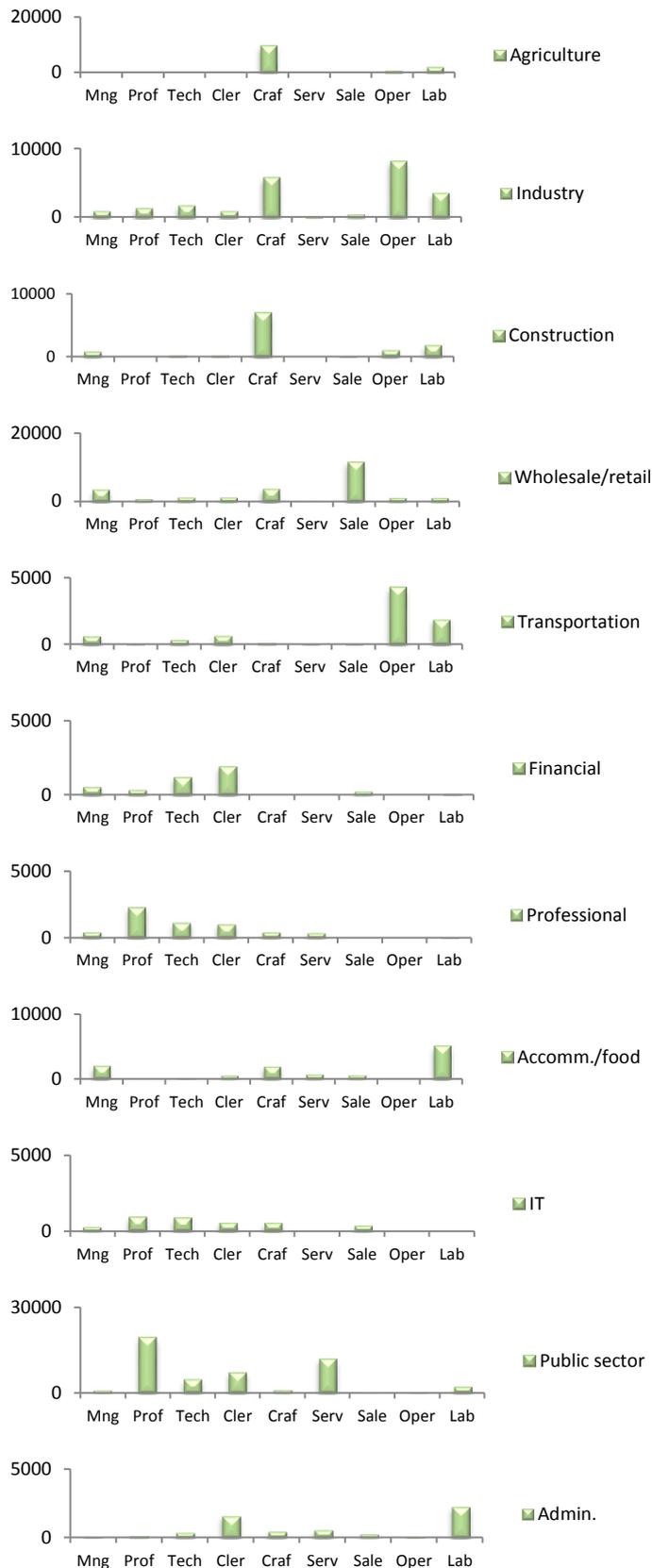
Source: Analysis by FÁS (SLMRU) based on CSO data

- In quarter 1 2012, 32,000 persons (one in five) in the Border region were employed as craftpersons; of these almost one third were farmers
- White collar workers (managers, professionals, associate professionals and clerks combined) accounted for 40% of the total employment; a significant share of white collar employment was in the public sectors (PAD, education and health)
- Operatives and labourers accounted for 23% of the total employment.



## Border

Figure 2.7 Employment by broad occupation and sector (Border) (000s), Q1 2012

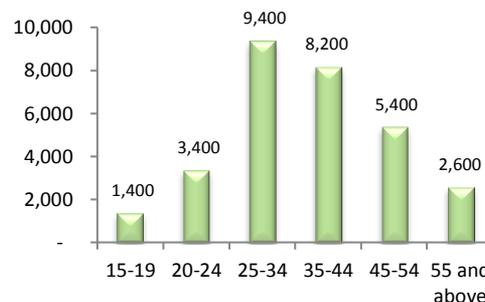


- Most persons employed in manufacturing in quarter 1 2012, worked in low skilled occupations (operatives and labourers) and as craftpersons; however, industry also provided 8,000 white collar jobs (managers, professionals, associate professionals and clerks combined)
- Most persons employed in wholesale/retail, transport, and accommodation/food services worked in low skilled occupations as service and sales workers, operatives and labourers
- Managers were primarily employed in the wholesale/retail and accommodation and food services sectors (proprietors)
- Overall, professionals and associate professionals were primarily employed in the public sector (PAD, education and health), with some in professional and IT services and industry
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers, retail managers and publicans  
**Professionals:** nurses, teachers and accountants  
**Technicians/Associate Professionals:** Gardaí  
**Clerks:** Government clerks, payroll clerks, bank clerks and PAs  
**Craft:** farmers, butchers, chefs, fitters, electricians, mechanics, carpenters  
**Services:** care workers, hairdressers, child-minders, ed. assistants  
**Sales:** retail assistants  
**Operatives:** food processing operatives, drivers, assemblers  
**Labourers:** cleaners, waiters and bar staff, catering assistants, packers, construction and storage labourers.

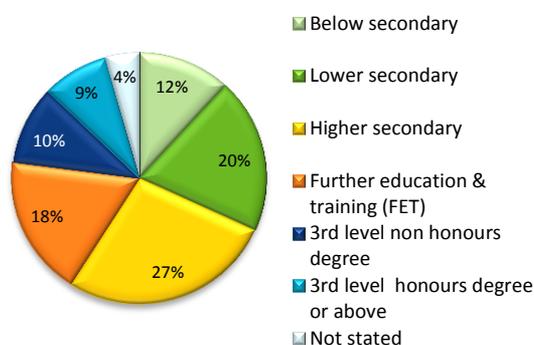
Source: Analysis by FÁS (SLMRU) based on CSO data

Figure 2.8 Unemployment by age (Border), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 2.9 Unemployment by education (Border), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

- In August 2012, there were almost 65,000 persons on the Live Register in the Border region; of these, 19% were under 25 and 62% were male
- In quarter 1 2012, there were just over 30,000 unemployed persons in the Border region in ILO terms
  - 16% of unemployed persons were under 25, with the highest share (almost one third) aged 25-34
  - almost one third of unemployed persons held less than higher secondary education qualifications
  - one in four had previously been employed in construction, with a further 16% in industry and 12% in the wholesale and retail trade
- The highest level of unemployment was in the following occupations: craft (carpenters and joiners and other construction and building trades), sales (sales assistants) and elementary (construction labourers).

Figure 2.10a PES job seekers, Sept 2012

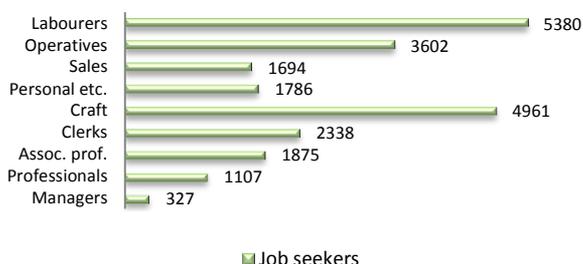
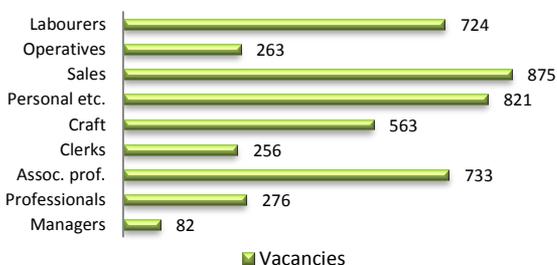


Figure 2.10b PES vacancies, Jan-Sept 2012



- In September 2012, 23,000 job seekers were registered with the DSP/FÁS; the highest number of job seekers had previously worked as labourers (process plant and construction), craftpersons (carpenters, plasterers, bricklayers, painters) and operatives (process operatives)
- Between Jan-Sept 2012, 4,500 vacancies were advertised through DSP/FÁS (Jobs Ireland); the highest number of vacancies was for sales staff (credit collectors, sales assistants), personal services staff (care workers, security guards), associate professionals (business sales executives, vocational trainers), and labourers (cleaners, kitchen assistants, waiters).

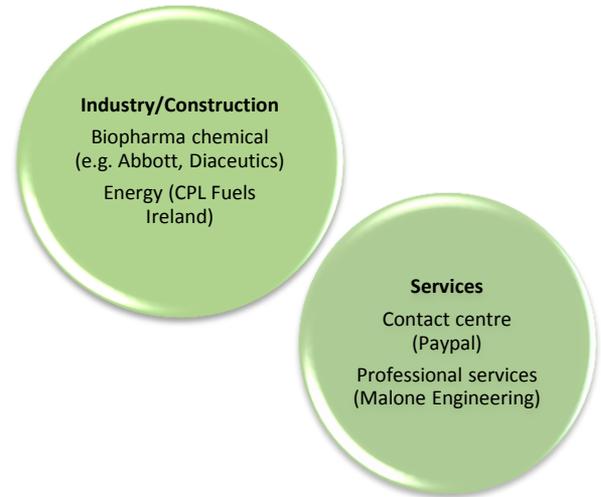
Source: Analysis by FÁS (SLMRU) based on DSP/FAS data



## Border

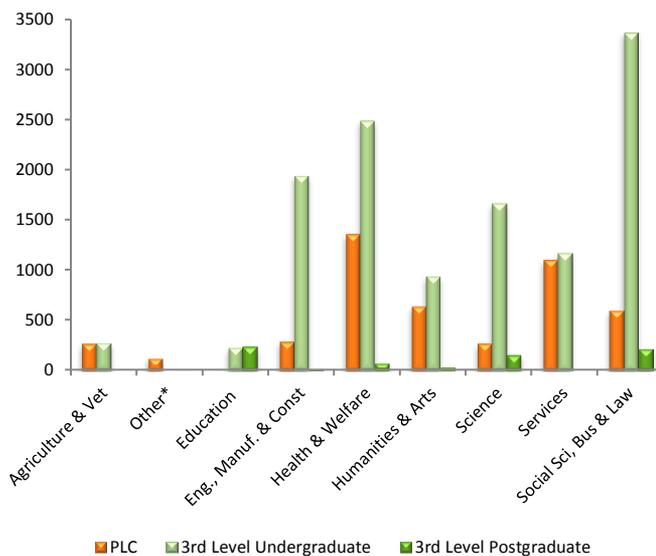
- Over the period quarter 1 2011 to quarter 1 2012, employment in the Border region declined by 6%; although all sectors recorded employment decreases (except education), sectors which recorded a lower relative decline than average included public sector (PAD, education and healthcare), construction (as it had already declined sharply in preceding years), agriculture, accommodation/food services, and IT
- Although industrial employment declined by 13.6%, there is some indication that high-tech manufacturing is performing well, with recent job announcements in bio-pharma sector
- There have also been indications of job creation in the energy sectors and in the services sector.

Figure 2.11 Job creation announcements



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

Figure 2.12 PLC Course & Higher Education Enrolments (Border), 2011

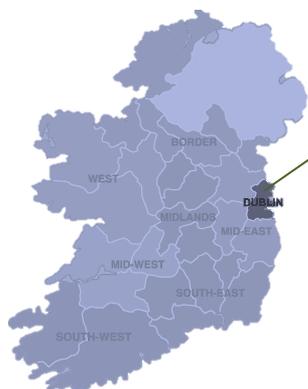


Source: DES, HEA

\* The 'Other' category includes broad and combined fields of learning

- There were over 17,000 student enrolments in the Border region in selected further and higher education in 2011; of these, there were
  - almost 5,000 PLC enrolments
  - over 12,000 undergraduates
  - over 700 postgraduates
- In the PLC sector, the highest number of enrolments was for health and welfare, followed by services; combined, these two fields accounted for more than one half of all PLC enrolments
- At undergraduate level, with 28% of enrolments, the social science, business and law field had the highest number of enrolments, followed by health and welfare (21%)
- Almost one third of post graduate enrolments were in education; 29% were in social science, business and law and a further 21% were in science.

### 3. Dublin



|                     |           |
|---------------------|-----------|
| Population          | 1,197,000 |
| Working age (15-64) | 805,000   |
| Labour force        | 580,000   |
| Employment          | 504,000   |
| Unemployment        | 76,000    |
| Unemployment rate   | 13.1%     |
| Participation rate  | 61.3%     |

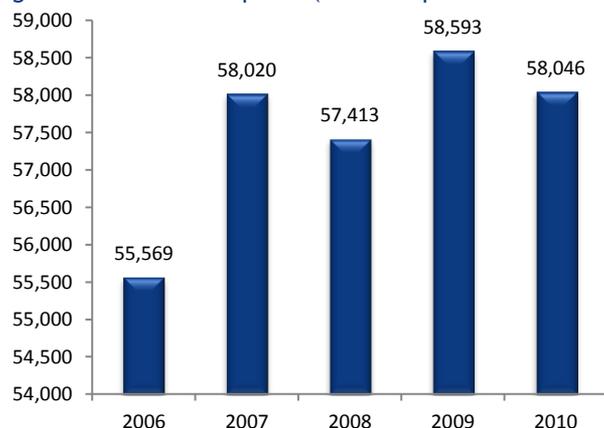
Figure 3.1 Employment by broad economic sector (Dublin), Q1 2012

- In quarter 1 2012, the health and wholesale and retail sectors were the largest employers in the Dublin region, each with almost 70,000 employed
- High value added sectors (professional, financial and IT activities) accounted for almost a quarter of the region’s employment
- Industry accounted for 8% of employment in the Dublin region while agriculture accounted for a negligible share.



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

Figure 3.2 Active enterprises (excludes public sector and agriculture)



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

- In 2010, there were 58,000 active enterprises outside agriculture and the public sector in the Dublin region
- 88% of active enterprises employed fewer than 10 persons and 0.5%, 250 persons or more
- The number of active enterprises declined by over 500 between 2009 and 2010; despite this decline, the number of enterprises in 2010 was broadly in line with 2007
- Between 2009 and 2010, the number of active enterprises in construction alone declined by over 800
- The largest number of active enterprises was in professional, scientific & technical activities (over 13,000) and wholesale & retail (over 11,000 in each).



## Dublin

- The highest number of medium to large enterprises (employing more than 50 persons) in the Dublin region is found in
  - wholesale and retail
  - finance (including banking, financial services, insurance)
  - manufacturing
  - ICT
- There are also some medium-large companies in accommodation and food services and in professional services (e.g. engineering, legal/accounting, advertising, etc.).

Figure 3.3 Sectors with largest enterprises, Dublin region



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 3.4a Industrial units

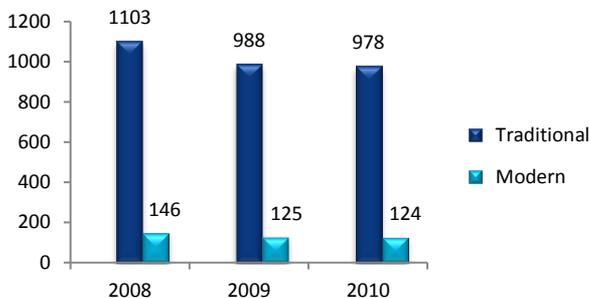
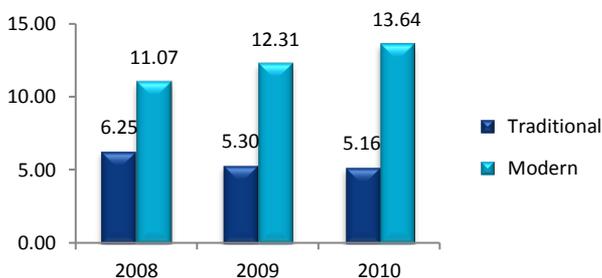


Figure 3.4b Gross output in industrial units (€ billion)

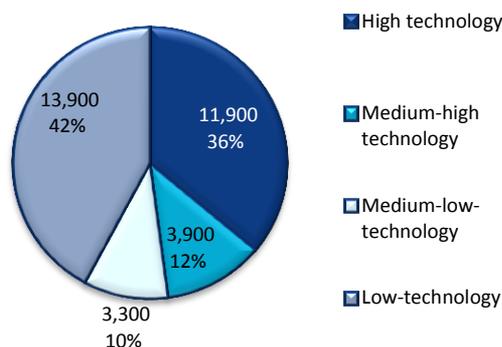


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 89% of all industrial units (manufacturing, energy and utilities) in the Dublin region were in the traditional sector
- While just over 10% of industrial units were in the modern industry sector, they produced almost three quarters of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with the modern sector declining by a greater magnitude (15% compared to 11%)
- Although the number of industrial units remained almost unchanged between 2009 and 2010, the value of gross output in the modern sector increased from €12.31 billion to €13.64 billion.

- In quarter 1 2012, 33,000 persons in the Dublin region were employed in manufacturing
- High-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for over a third of all manufacturing employment in this region with a further 12% employed in medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment etc.); 10% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) with a further 42% in low-tech manufacturing (e.g. food processing, wood, printing etc.).

Figure 3.5 Manufacturing employment (Dublin), Q1 2012



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

Figure 3.6 Employment by broad occupation (Dublin), Q1 2012



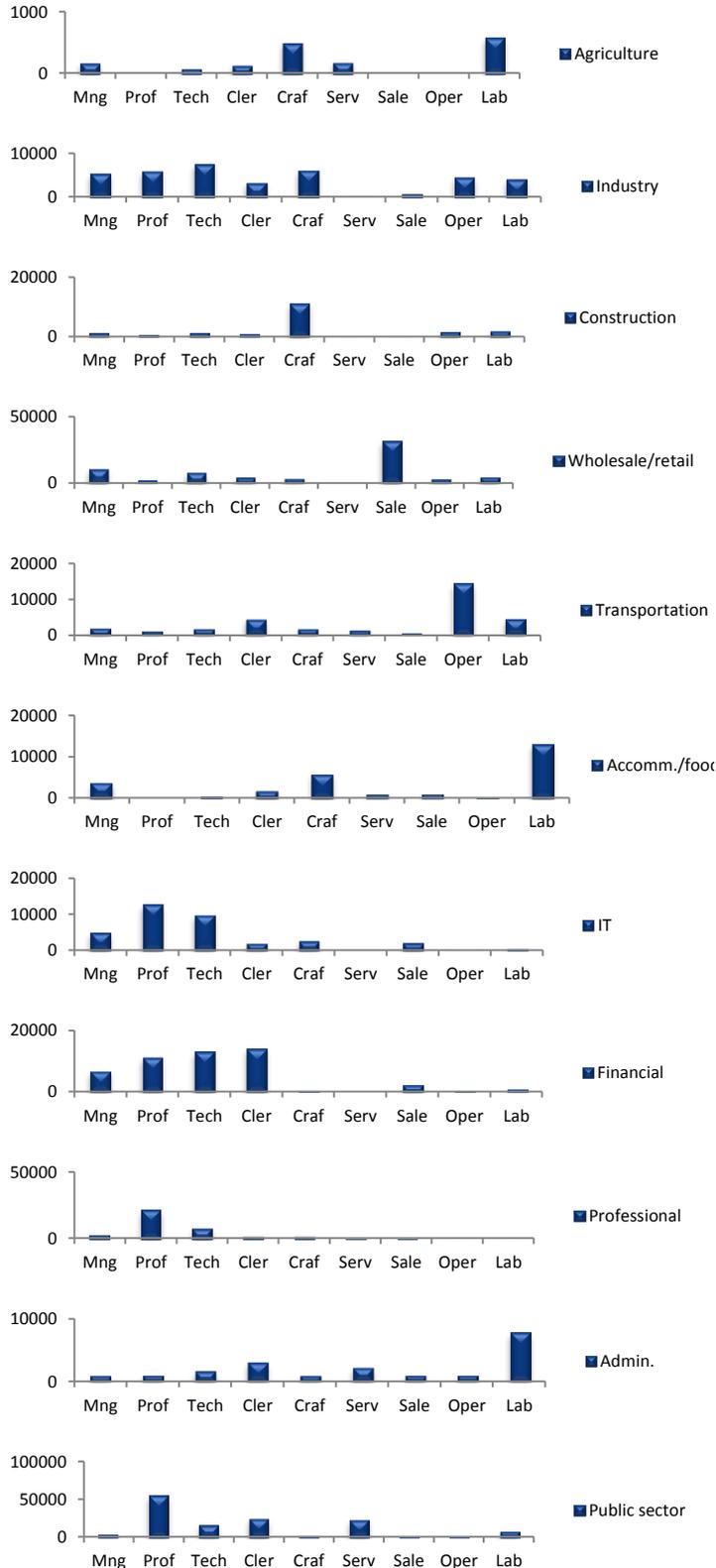
- In quarter 1 2012, 115,000 persons (almost a quarter) in the Dublin region were employed in professional occupations with a further 15% employed as associate professionals
- Skilled trades occupations accounted for 8% of employment in this region, the lowest share when compared with the other regions
- Combined, operatives and labourers accounted for 15% of the total employment.

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



## Dublin

Figure 3.7 Employment by broad occupation and sector (Dublin) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was provided by a number of sectors, including financial, IT, professional services and the public sector, but also by the industrial sector
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers and production managers

**Professionals:** accountants, nurses, teachers, programmers, solicitors and doctors

**Associate professionals:** business sales executives, sales accounts managers and financial accounts managers

**Clerks:** Government clerks, payroll clerks, bank clerks and PAs

**Craft:** chefs, electricians

**Services:** care workers, hairdressers, child-minders

**Sales:** retail assistants, customer service occupations

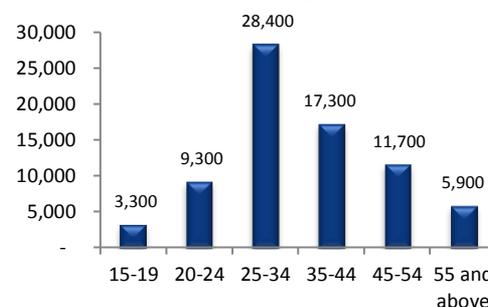
**Operatives:** taxi drivers

**Labourers:** cleaners, storage workers, catering assistants, waiters and bar staff, security guards.

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

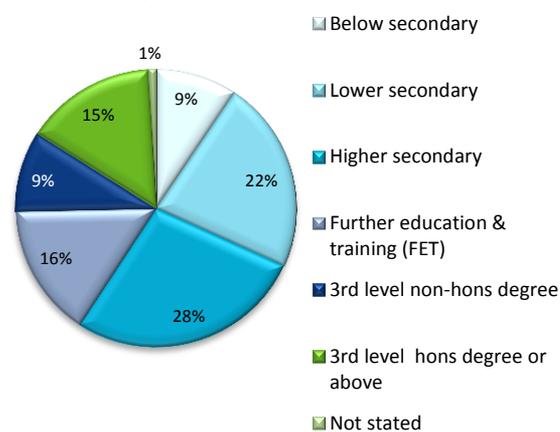
- In August 2012, there were 110,500 persons on the Live Register in the Dublin region; of these, 17% were under 25 and 65% were male
- In quarter 1 2012, there were almost 76,000 unemployed persons in the Dublin region in ILO terms
  - 17% of the unemployed persons were under 25, with the highest share (37%) aged 25-34
  - Almost one third of unemployed persons held less than higher secondary education qualifications
  - One in five had previously been employed in construction, while a further 13% had been in the wholesale and retail trade and 11% in industry
- The highest level of unemployment was in the following occupations: craft (electricians, plumbers, painters, bricklayers, carpenters), sales (sales assistants), elementary (construction and storage labourers, bar staff, cleaners), clerks, hairdressers and taxi drivers.

Figure 3.8 Unemployment by age (Dublin), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 3.9 Unemployment by education (Dublin), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 3.10a PES job seekers, Sept 2012

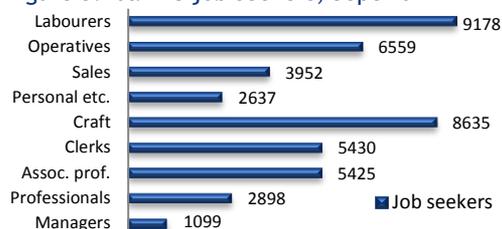
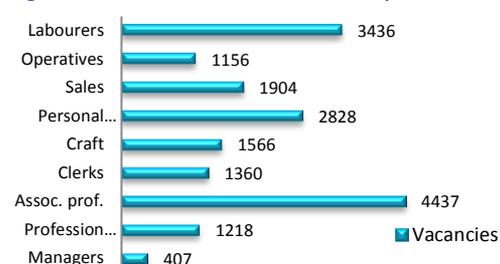


Figure 3.10b PES vacancies, Jan-Sept 2012



Source: Analysis by FÁS (SLMRU) based on DSP/FAS data

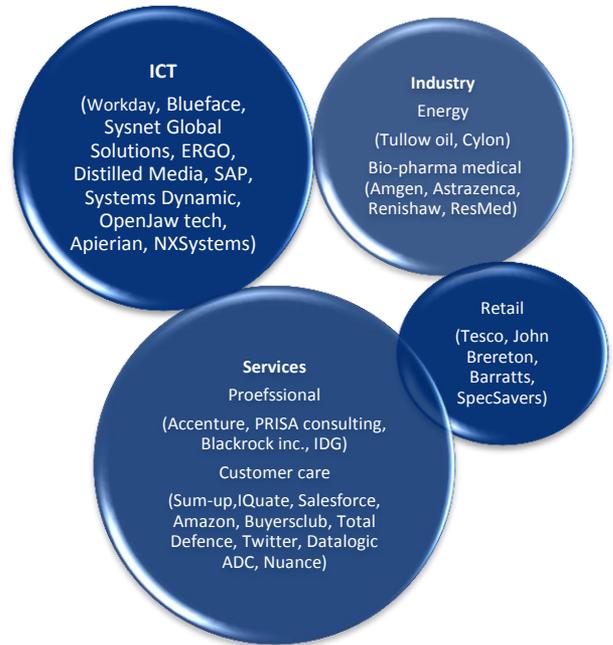
- In September 2012, almost 46,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as labourers (construction, process plant), craftsperson's (carpenters, electricians) and operatives (process operatives)
- Between Jan - Sept 2012, over 18,000 vacancies were advertised through DSP/FÁS Jobs Ireland; the highest number of vacancies was for sales associate professionals (business sales executives, IT support technicians), labourers (kitchen catering assistants, cleaners), personal services staff (care workers, nursing assistants) and sales staff (sales assistants and credit collectors).



Dublin

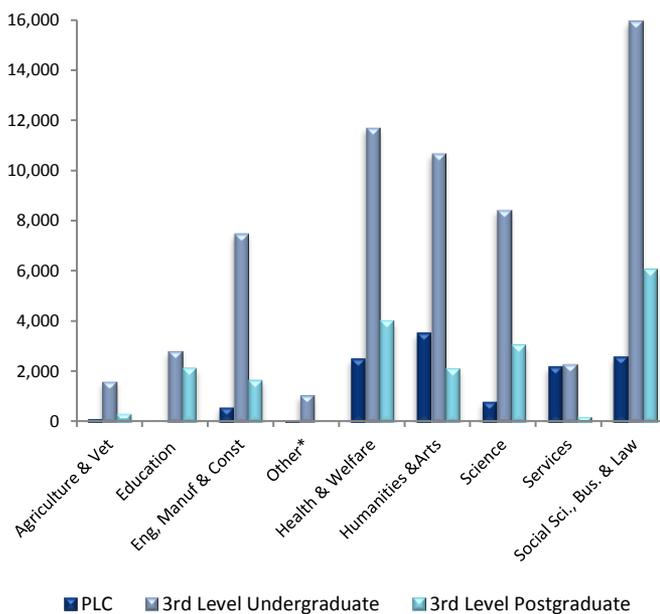
- Over the period quarter 1 2011 to quarter 1 2012, employment declined by 2%; however, employment growth varied by sector:
  - employment increased in the ICT, accommodation/food services, agriculture (albeit from a very small base) and healthcare sectors; the strongest growth was in ICT (13%)
  - there was very little change (around 1%) in the education, financial, administrative services and wholesale/retail sectors
  - employment in PAD, industry, transport, construction and professional services declined; the greatest decline was in PAD (almost 20%)
- Recent job announcements suggest that over the short to medium term, the ICT sector will continue to perform well; job opportunities will also arise in industry (bio-pharma and energy areas), retail and various services (particularly in the area of customer care).

Figure 3.11 Job creation announcements



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

Figure 3.12 PLC Course & Higher Education Enrolments (Dublin), 2011



Source: DES, HEA

\* The 'Other' category includes broad and combined fields of learning

- In 2011, there were more than 94,000 student enrolments in the Dublin region
  - over 12,000 PLC course enrolments
  - more than 62,000 undergraduates
  - almost 20,000 postgraduates
- PLC enrolments were concentrated in health and welfare, humanities and arts, and, social science business and law; combined, these three fields accounted for more than two thirds (or over 8,600) of all PLC enrolments
- Undergraduate enrolments were mostly in social science, business and law (26%), health and welfare (19%), and humanities and arts (17%)
- For postgraduate enrolments, the highest number of enrolments was in social science, business and law (almost a third, or over 6,000), health and welfare (a fifth, over 4,000), and science (16%, or over 3,000).

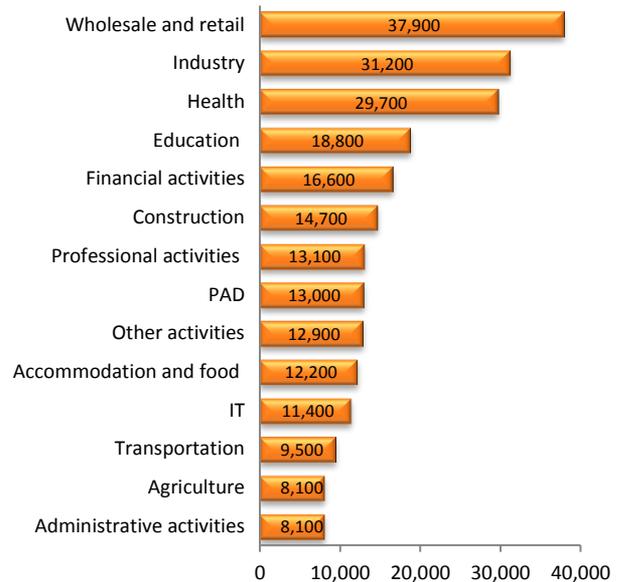
## 4. Mid East



|                     |         |
|---------------------|---------|
| Population          | 551,000 |
| Working age (15-64) | 368,000 |
| Labour force        | 271,000 |
| Employment          | 237,000 |
| Unemployment        | 34,000  |
| Unemployment rate   | 12.5%   |
| Participation rate  | 65.2%   |

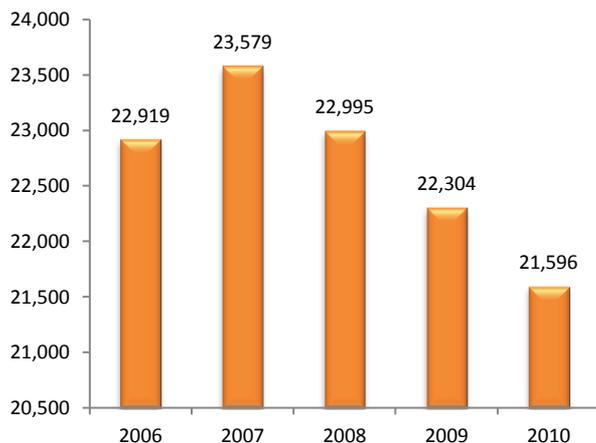
- In quarter 1 2012, the wholesale and retail and industry sectors accounted for almost 30% of the total workforce in the Mid East region
- Public sector employment (in PAD, health and education) totalled over 60,000, amounting to a quarter of the total workforce
- High value added sectors (professional, financial and IT activities) accounted for 17% of the region's employment, the highest share outside of the Dublin region.

Figure 4.1 Employment by broad economic sector (Mid East), Q1 2012



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

Figure 4.2 Active enterprises (excludes public sector & agriculture)



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

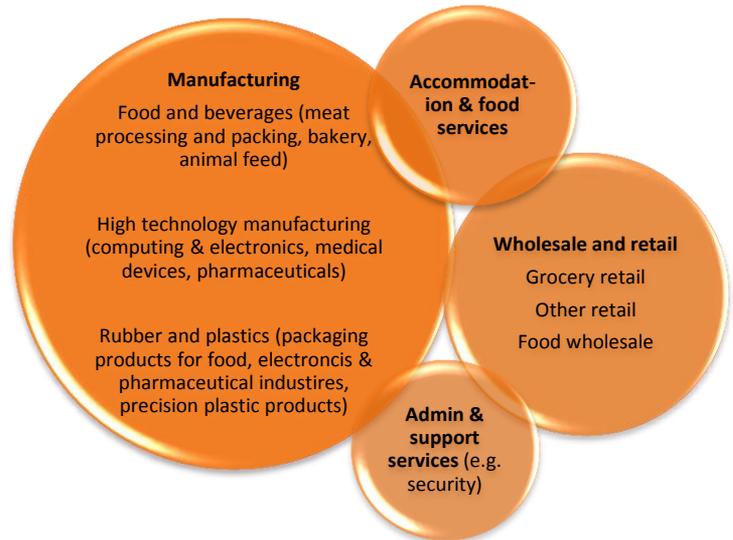
- In 2010, there were just fewer than 21,600 active enterprises outside the agriculture and public sector, in the Mid East region
- 92% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by almost 2,000 between 2007 and 2010
- Between 2009 and 2010, the number of active enterprises in construction alone declined by over 500
- The largest number of active enterprises were in construction and wholesale and retail (approximately 5,000 in each), followed by professional activities (3,200).



## Mid-East

- The highest number of medium to large enterprises (employing more than 50 persons) in the Mid East region is found in manufacturing, particularly in food processing, high-tech manufacturing, and rubber/plastic products
- There are also some medium to large enterprises in wholesale and retail, accommodation and food services, and administrative and support services.

Figure 4.3 Sectors with largest enterprises



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Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 4.4a Industrial units

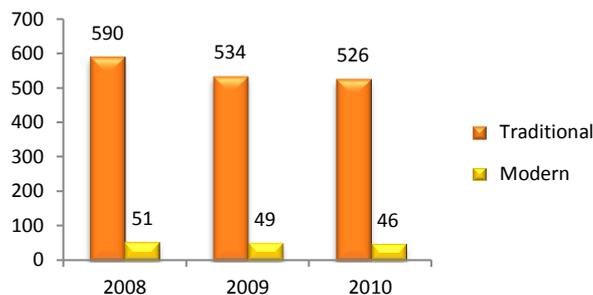
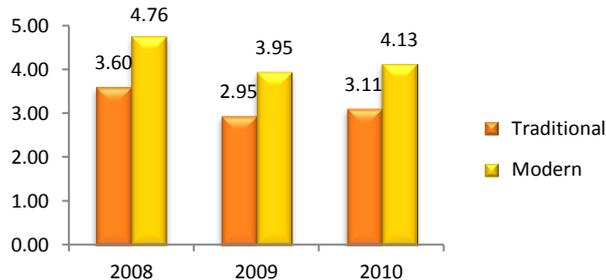


Figure 4.4b Gross output in industrial units (€ billion)

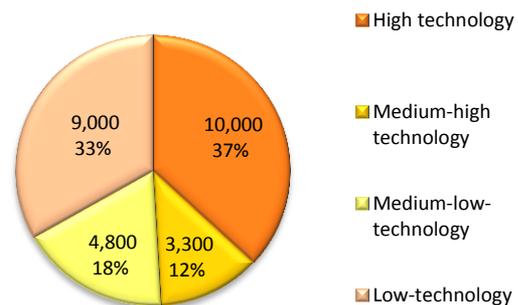


- In 2010, 92% of all industrial units (manufacturing, energy and utilities) in the Mid East region were in the traditional sector
- While less than 10% of industrial units were in the modern industry sector, they produced over a half of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with both sectors (modern and traditional) declining by a similar magnitude (approximately 10%)
- Although the number of industrial units declined slightly between 2009 and 2010, the value of gross output in the modern sector increased from €3.95 billion to €4.13 billion.

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

- In quarter 1 2012, 27,000 persons in the Mid East region were employed in manufacturing
- High-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for 37% of manufacturing employment; 30% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) and medium to high tech (e.g. chemicals, electrical, transport equipment etc.) combined; a further third were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.).

Figure 4.5 Manufacturing employment (Mid East), Q1 2012



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

Figure 4.6 Employment by broad occupation (Mid East), Q1 2012



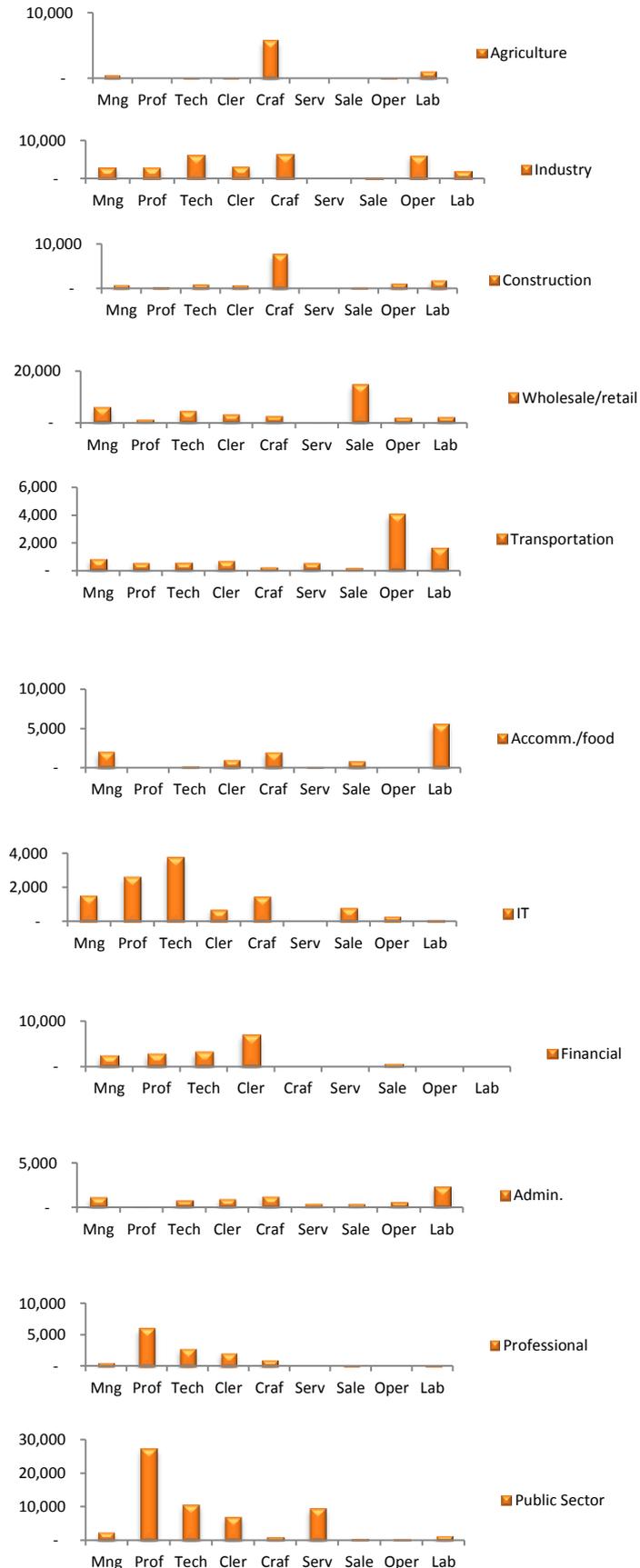
- In quarter 1 2012, the Mid East region had the second highest share of persons employed in white collar occupations (managers, professionals, associate professionals and clerks combined) at 57% of the total workforce
- Over a third of white collar employment was in the public sectors (PAD, education and health) with a further 20% in financial and professional activities
- Combined, operatives and labourers accounted for 15% of the total employment.

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



## Mid-East

Figure 4.7 Employment by broad occupation and sector (Mid East) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was primarily provided by the public sector, but also by a number of other sectors, including financial, IT, professional services and industry
- Most persons employed in wholesale/retail, transport, and accommodation/food services worked in low skilled occupations as service and sales workers, operatives and labourers
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers and production managers

**Professionals:** accountants, nurses, teachers, IT professionals

**Technicians:** business sales executives, sales accounts managers, Gardaí

**Clerks:** Government clerks, payroll clerks, bank clerks and PAs

**Craft:** farmers, metal working production and maintenance fitters, electricians

**Services:** care workers, hairdressers, child-minders

**Sales:** retail assistants

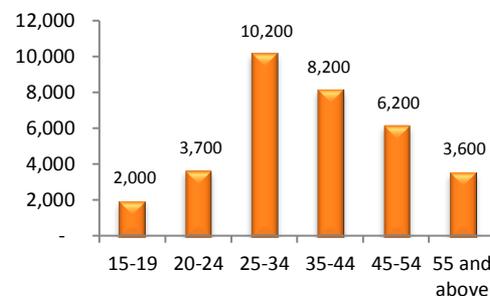
**Operatives:** taxi drivers, food processing operatives, truck drivers

**Labourers:** cleaners, storage and construction labourers, waiters, security guards.

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

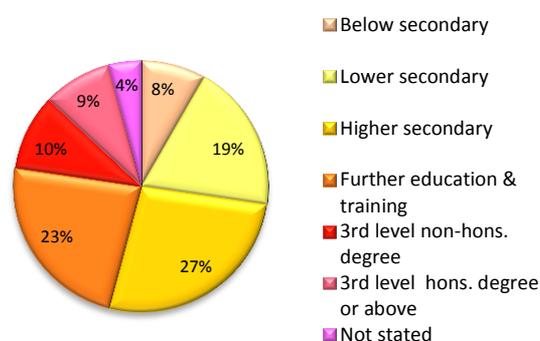
- In August 2012, there were 43,000 persons on the Live Register in the Mid East region; of these, 17% were under 25 and 62% were male
- In quarter 1 2012, there were almost 34,000 unemployed persons in the Mid East region in ILO terms
  - 17% of unemployed persons were under 25, with the highest share (almost one third) aged 25-34
  - over one in four of unemployed persons held less than higher secondary education qualifications
  - almost one third had previously been employed in construction, with a further 11% in the wholesale and retail trade and 10% in industry
- The highest level of unemployment was in the following occupations: craft (carpenters), sales (sales assistants), elementary (construction labourers).

Figure 4.8 Unemployment by age (Mid East), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 4.9 Unemployment by education (Mid East), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 4.10a PES job seekers, Sept 2012

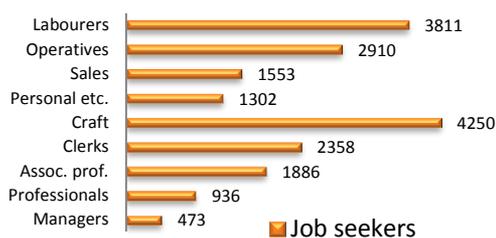
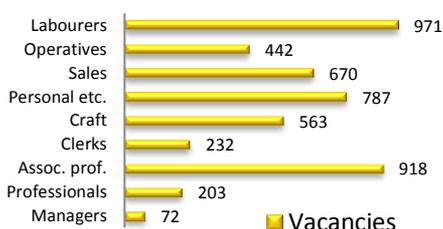


Figure 4.10b PES vacancies, Jan-Sept 2012



- In September 2012, almost 20,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as craftpersons (carpenters, electricians), labourers (construction, process plant) and operatives (process operatives)
- Between Jan - Sept 2012, almost 5,000 vacancies were advertised through DSP/FÁS (Jobs Ireland); the highest number of vacancies was for labourers (cleaners, domestics, kitchen and catering assistants), associate professionals (business sales executives, IT support technicians), personal services (care workers, home carers) and sales staff (credit collectors, assistants).

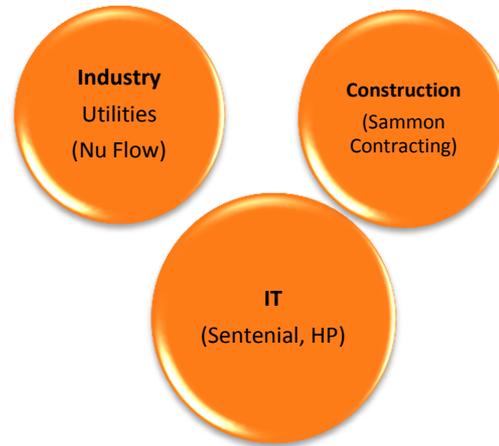
Source: Analysis by FÁS (SLMRU) based on DSP/FAS data



## Mid-East

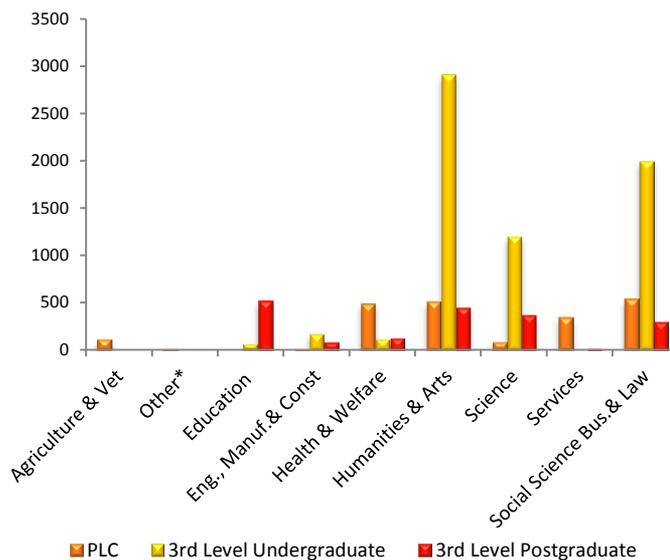
- Over the period quarter 1 2011 to quarter 1 2012, employment increased by 4%; with the exception of the transport, PAD and education which contracted, all sectors recorded increase in employment levels; the greatest increases were recorded in agriculture and IT (17% each).
- Recent job announcements suggest that, over the short to medium term, the ICT sector will continue to perform well with job opportunities also arising in industry (utilities) and construction.

Figure 4.11 Job creation announcements



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

Figure 4.12 PLC Course & Higher Education Enrolments (Mid East), 2011

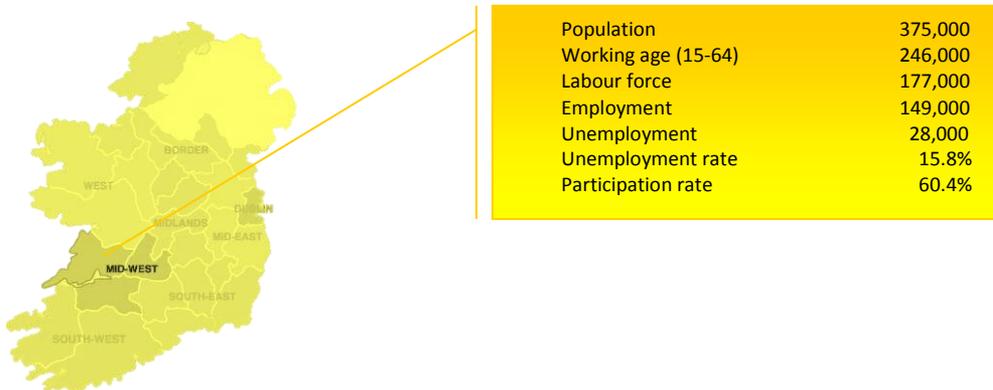


Source: DES, HEA

\* The 'Other' category includes broad and combined fields of learning

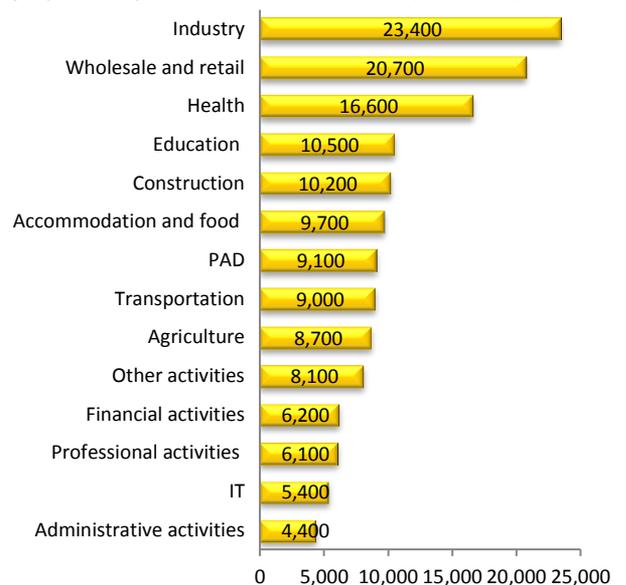
- There were almost 15,000 students in the Mid East region in 2011:
  - over 2,000 PLC enrolments
  - over 6,000 undergraduates
  - almost 2,000 postgraduates
- In the PLC sector, enrolments were concentrated in three fields, each with approximately 500 students: social science, business and law; humanities and arts; and health and welfare; combined, these three fields make up approximately three quarters of all PLC enrolments in the Mid East
- At undergraduate level, 45% of enrolments was in the humanities and arts, with a further 30% in social science, business and law
- At postgraduate level, the highest number of enrolments was in education (making up 27%), followed by humanities and arts (24%).

## 5. Mid West



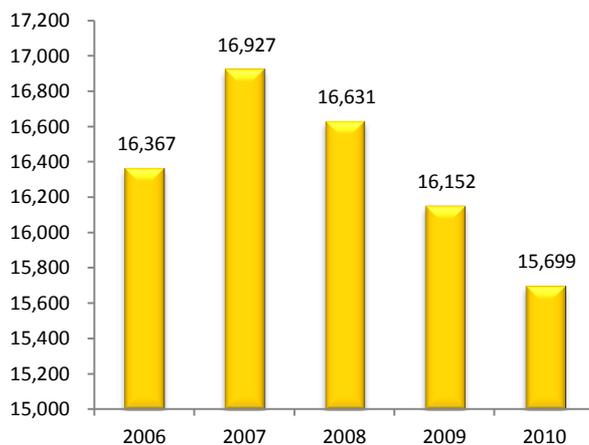
- In quarter 1 2012, industry was the largest employer in the Mid West region, at 16% of the total workforce, with a further 14% employed in the wholesale and retail sector
- The public sector (PAD, health and education combined) employed 36,000 persons or almost a quarter of the total workforce
- High value added sectors (professional, financial and IT activities) each accounted for 4% of the region's employment.

Figure 5.1 Employment by broad economic sector (Mid West), Q1 2012



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

Figure 5.2 Active enterprises (excludes public sector & agriculture)



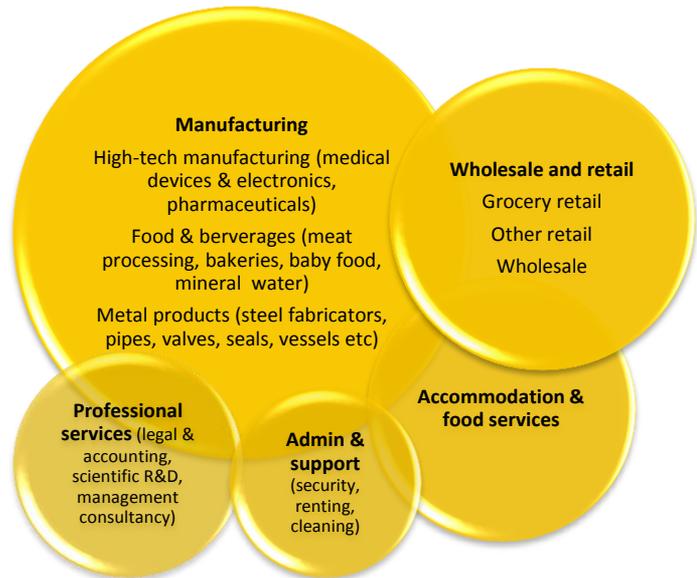
Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, there were almost 16,000 active enterprises outside agriculture and the public sector in the Mid West region
- 91% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by over 1,200 between 2007 and 2010
- The number of active enterprises in construction alone declined by almost 400 between 2009 and 2010
- The largest number of active enterprises were in wholesale and retail and construction (approximately 3,500 in each).



Figure 5.3 Sectors with largest enterprises

- The highest number of medium to large enterprises (employing more than 50 persons) in the Mid West region is found in manufacturing and wholesale and retail
- There are also some medium to large enterprises in accommodation and food services as well as in professional services and in administration and support services.



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 5.4a Industrial units

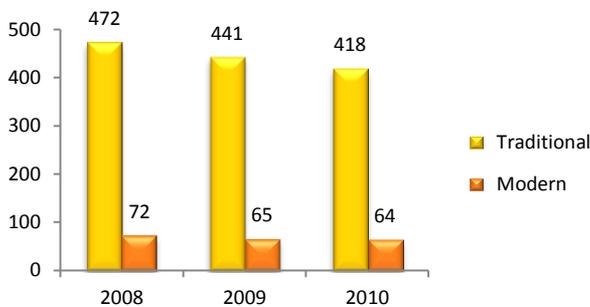
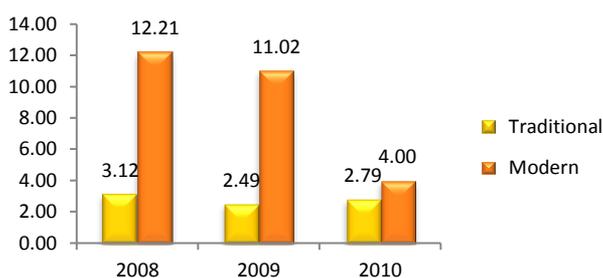


Figure 5.4b Gross output in industrial units (€ billion)



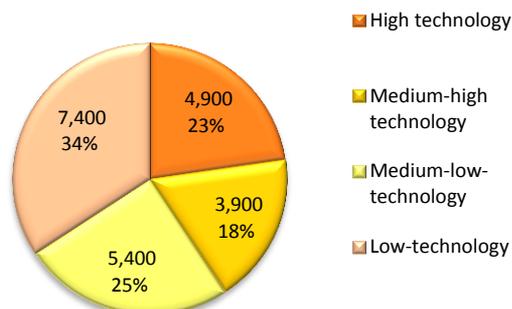
- In 2010, 87% of all industrial units (manufacturing, energy and utilities) in the Mid West region were in the traditional sector
- While less 13% of industrial units were in the modern industry sector, they produced over a half of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with both sectors (modern and traditional) declining by a similar magnitude (-11% each)
- Although the number of industrial units declined, the value of gross output in the traditional sector increased between 2009 and 2010 from €2.49 billion to €2.79 billion; the value of gross output in the modern sector declined from €11billion to €4 billion.

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



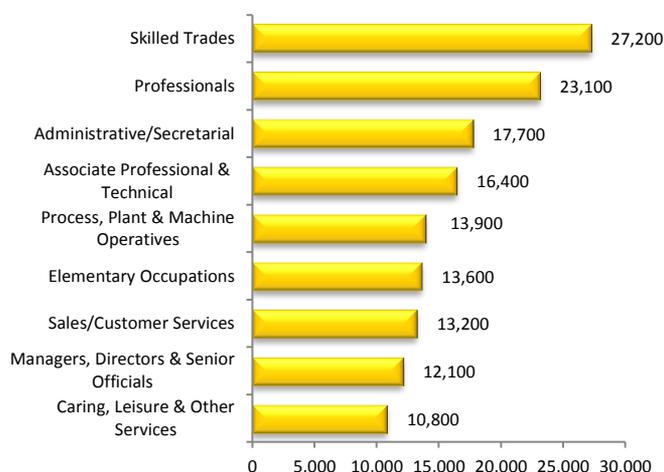
- In quarter 1 2012, 21,500 persons in the Mid West region were employed in manufacturing
- Over a third (34%) were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.); 25% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); 18% were employed in medium-high tech (e.g. chemicals, electrical, transport equipment etc.), while high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for almost a quarter of employment.

Figure 5.5 Manufacturing employment (Mid West), Q1 2012



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

Figure 5.6 Employment by broad occupation (Mid West), Q1 2012



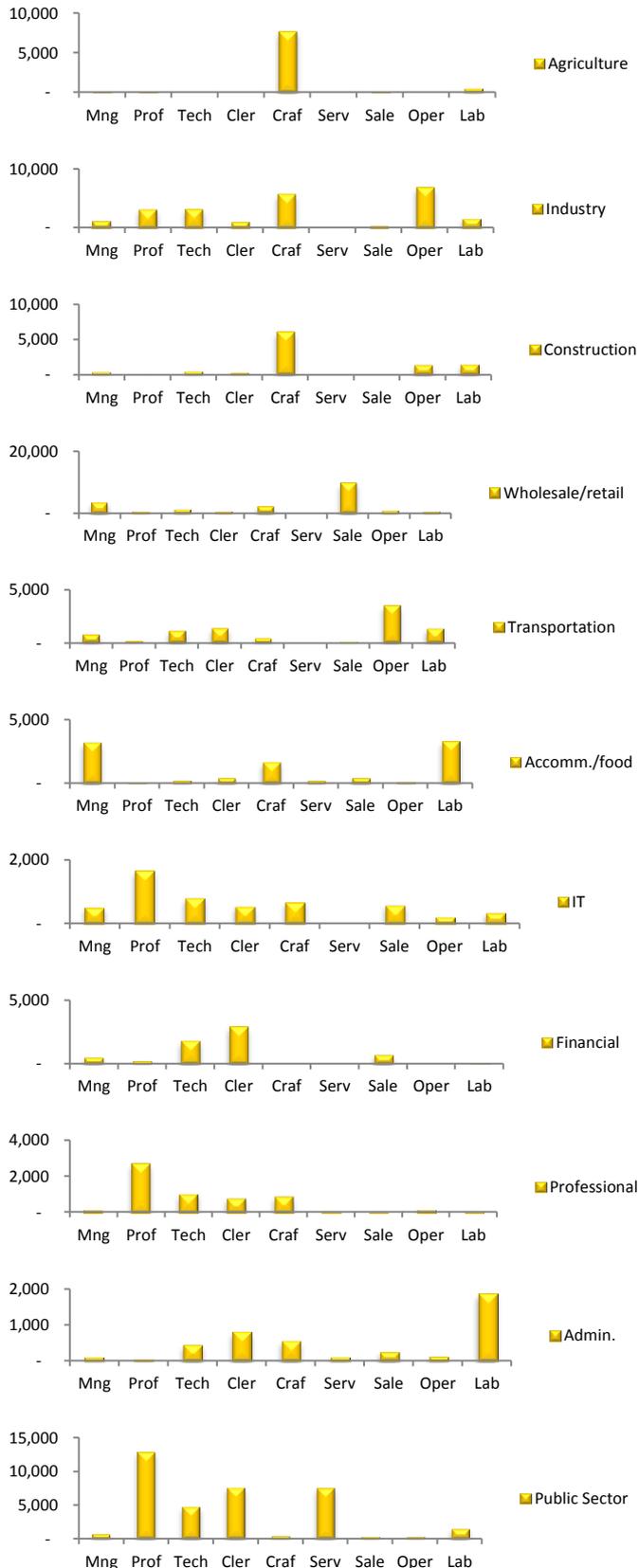
Source: Analysis by FÁS (SLMRU) based on CSO data

- In quarter 1 2012, skilled trades accounted for 18% of employment, or 27,200 persons, in the Mid West region; of these, over a quarter were farmers and a fifth were employed in the construction sector
- White collar workers (managers, professionals, associate professionals and clerks combined) accounted for 47% of the total employment; a significant share of white collar employment was in the public sector (PAD, education and health)
- Combined, operatives and elementary occupations accounted for 18% of the total employment in the Mid West region.



## Mid-West

Figure 5.7 Employment by broad occupation and sector (Mid West) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was primarily provided by the public sector, but also to a lesser extent by a number of other sectors, including IT, professional services and industry
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers.
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers

**Professionals:** nurses and teachers

**Technicians:** business sales executives

**Clerks:** Government clerks, bank clerks, payroll clerks, PAs

**Craft:** farmers, metal working production and maintenance fitters

**Services:** care workers

**Sales:** retail assistants

**Operatives:** truck drivers, assemblers

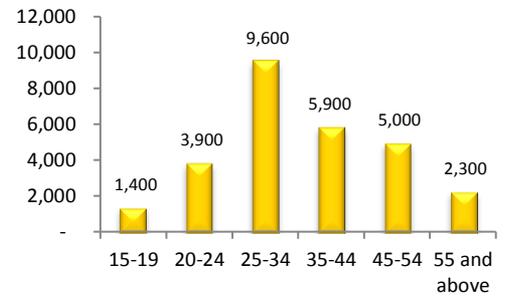
**Labourers:** construction labourers, cleaners.

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



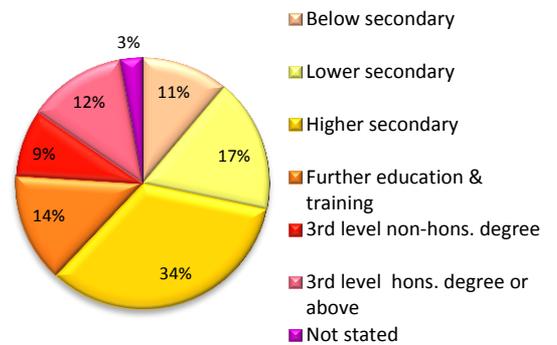
- In August 2012, there were 39,000 persons on the Live Register in the Mid West region; of these, 18% were under 25 and 62% were male
- In quarter 1 2012, there were almost 28,000 unemployed persons in the Mid West region in ILO terms
  - 19% of unemployed persons were under 25, with the highest share (34%) aged 25-34
  - over one quarter of unemployed persons held less than higher secondary education qualifications
  - one in five had previously been employed in construction, with a further 18% in industry and 12% in wholesale and retail trade
- The highest level of unemployment was in the following occupations: sales (sales assistants), elementary (construction labourers).

Figure 5.8 Unemployment by age (Mid West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 5.9 Unemployment by education (Mid West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 5.10a PES job seekers, Sept 2012

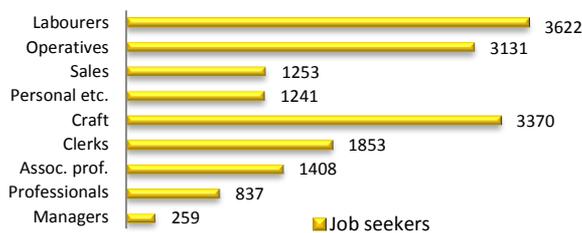
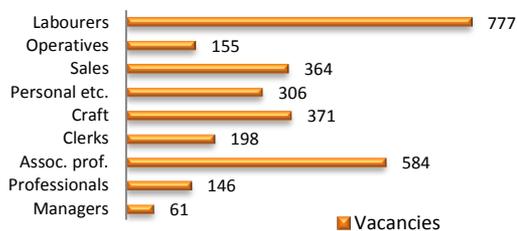


Figure 5.10b PES vacancies, Jan-Sept 2012



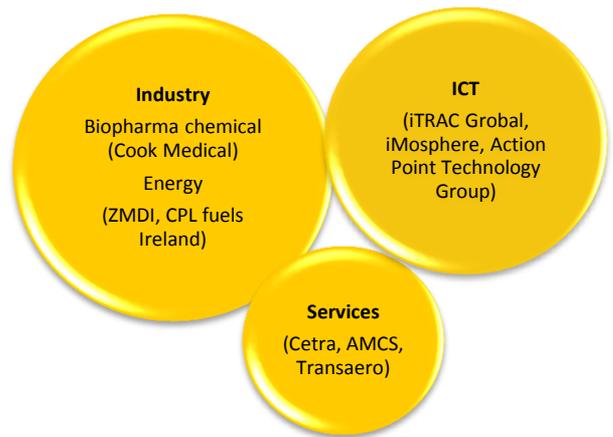
Source: Analysis by FÁS (SLMRU) based on DSP/FAS data

- In September 2012, 17,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as labourers (construction, process plant), craft (carpenters, bricklayers) or operatives (process operatives)
- Between Jan - Sept 2012, almost 3,000 vacancies were advertised through DSP/ FÁS (Jobs Ireland); the highest number of vacancies was for labourers (security guards, catering assistants), associate professionals (business sales executives, marketing associate professionals), craft workers (chefs, welding trades) and sales staff (credit collectors, sales assistants).



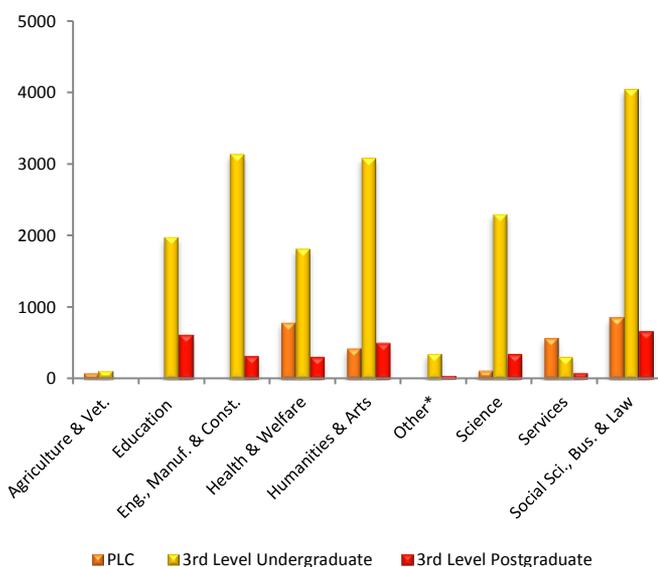
Figure 5.11 Job creation announcements

- Over the period quarter 1 2011 to quarter 1 2012, employment decreased by 2%; however, employment growth varied by sector:
  - employment increased in the construction, PAD, ICT, financial, wholesale/retail and transport sectors, with the strongest growth in construction (+18%)
  - employment decreased in the agriculture, accommodation/food services, healthcare, administrative and professional services, and education sectors; it remained relatively stable in industry (-0.7%)
- Recent job announcements suggest that over the short to medium term the ICT sector will continue to perform well; job opportunities will also arise in industry (bio-pharma and energy areas) and the services sector.



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

Figure 5.12 PLC Course & Higher Education Enrolments (Mid-West),

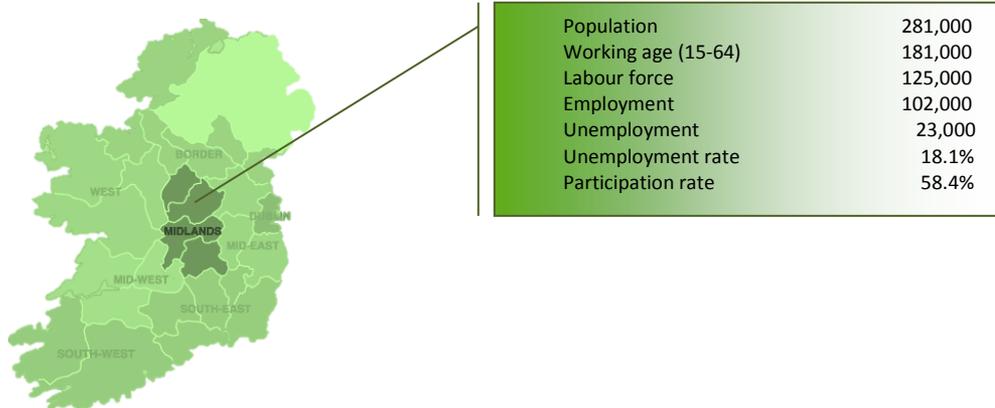


Source: DES, HEA

\* The 'Other' category includes broad and combined fields of learning

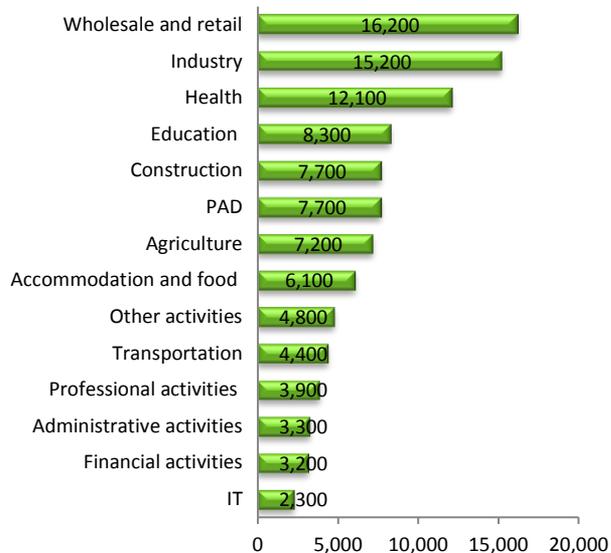
- In 2011, there were approximately 23,000 students enrolled in selected further and higher education and training in the Mid West region:
  - over 3,000 PLC students
  - more than 17,000 undergraduates
  - approximately 3,000 postgraduates
- Social science, business and law (e.g. business/secretarial studies) had the highest number of PLC enrolments, making up 30% of the total at this level
- Almost one quarter of all students at undergraduate level (4,000 enrolments) were in social science, business & law; this was followed by engineering, manufacturing & construction (18%), and humanities & arts (18%)
- At postgraduate level, the highest number of enrolments was in social science, business and law (23%), followed by education (21%).

## 6. Midland



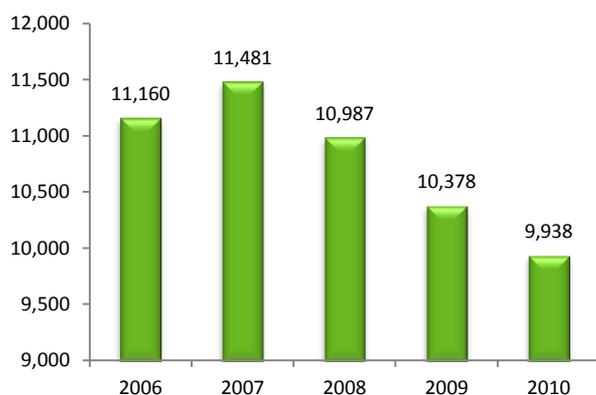
- In quarter 1 2012, the wholesale and retail and industry sectors combined accounted for 31% of total employment in the Midland region
- The public sector, comprising PAD, health and education, employed more than 28,000 persons or over a quarter of the total workforce
- The Midland region had the highest share of persons employed in construction at 8%
- High value added sectors (professional, financial and IT activities) accounted for a total of 9% of the region's employment.

Figure 6.1 Employment by broad economic sector (Midland), Q1 2012



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

Figure 6.2 Active enterprises (excludes public sector & agriculture)



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

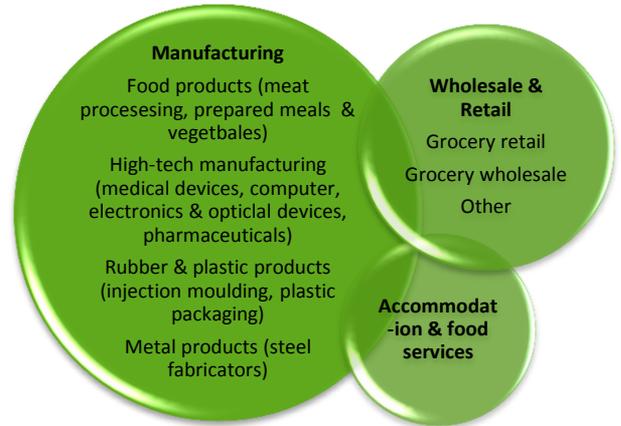
- In 2010, there were just fewer than 10,000 active enterprises outside agriculture and public sector in the Midland region
- 94% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by 1,500 between 2007 and 2010
- Between 2009 and 2010, the number of active enterprises in construction alone declined by over 300
- The largest number of active enterprises were in wholesale and retail and construction (2,500 in each).



## Midlands

Figure 6.3 Sectors with largest enterprises

- In the Midland region, manufacturing accounted for the largest number of medium-large enterprises, mostly in the areas of food processing, high-tech, rubber/plastic, and metal products
- There are also some medium to large enterprises wholesale and retail and in accommodation and food services.



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 6.4a Industrial units

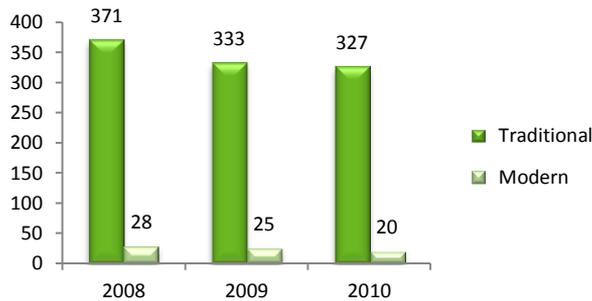
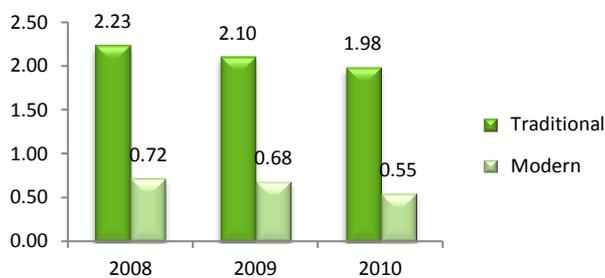


Figure 6.4b Gross output in industrial units (€ billion)

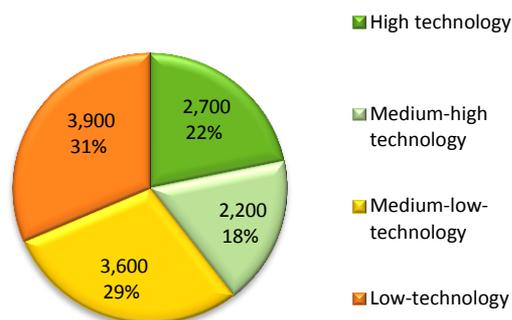


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 94% of all industrial units (manufacturing, energy and utilities) in the Midlands region were in the traditional sector
- While 6% of industrial units were in the modern industry sector, they produced over one fifth of the regional gross industrial output value in 2010
- The number of industrial units declined in both sectors between 2008 and 2010, with the modern sector declining at a greater rate
- As the number of industrial units declined, the value of gross output in both sectors also declined.

- In quarter 1 2012, over 12,000 persons in the Midland region were employed in manufacturing
- Over 60% were employed in low- tech manufacturing (e.g. food processing, wood, printing etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) combined; a further 18% were in medium-high tech (e.g. chemicals, electrical, transport equipment etc.); high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for 22% of employment.

Figure 6.5 Manufacturing employment (Midlands), Q1 2012



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

Figure 6.6 Employment by broad occupation (Midlands), Q1 2012



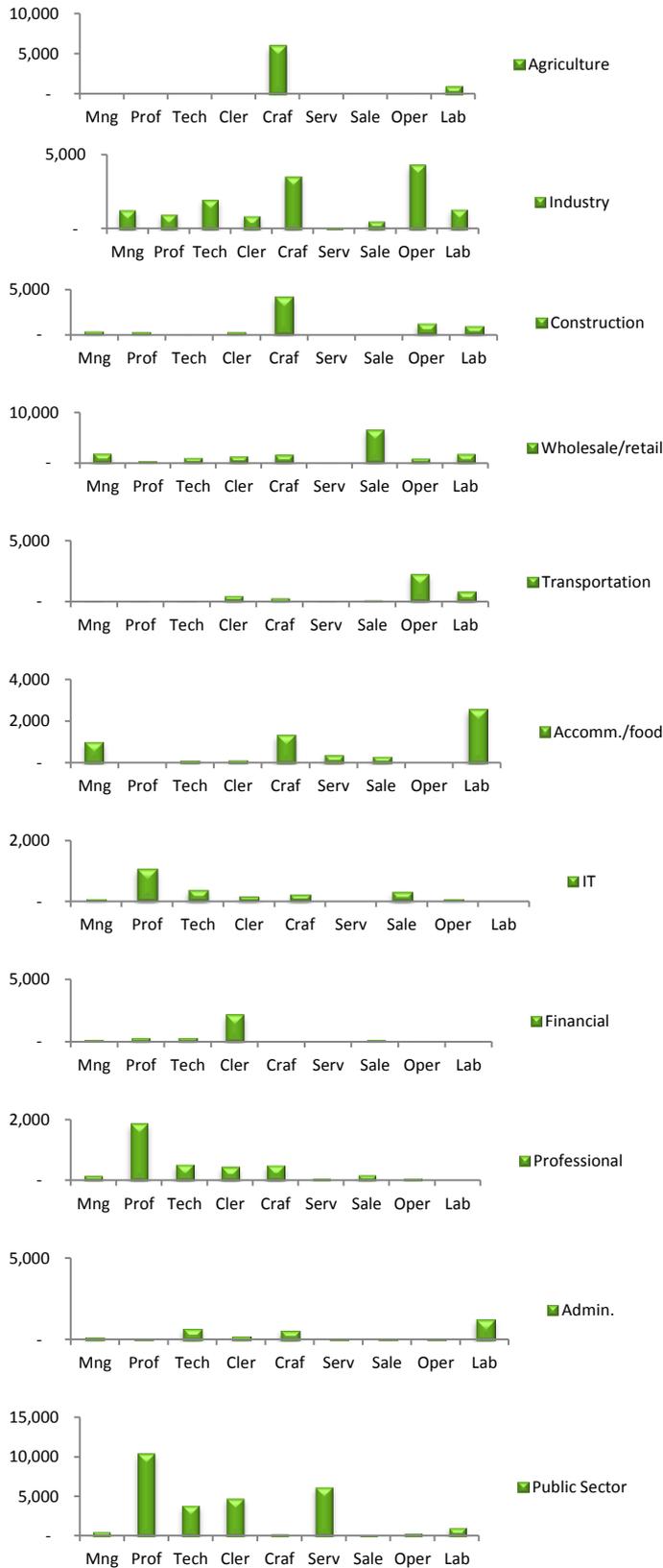
- In quarter 1 2012, 19,000 persons (or 19%) in the Midland region were employed in skilled trades; of this almost one third were farmers
- White collar workers (managers, professionals, associate professionals and clerks combined) accounted for 43% of total employment; almost half (44%) of white collar employment was in the public sectors (PAD, education and health)
- Operatives and labourers accounted for 20% of the total employment.

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



Midlands

Figure 6.7 Employment by broad occupation and sector (Midlands) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was primarily provided by the public sector, and, to a lesser extent, by a number of other sectors, including IT, professional services and industry
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers

**Professionals:** nurses and teachers

**Technicians:** business sales executives

**Clerks:** Government clerks, bank clerks

**Craft:** farmers, metal working production and maintenance fitters

**Services:** care workers

**Sales:** retail assistants

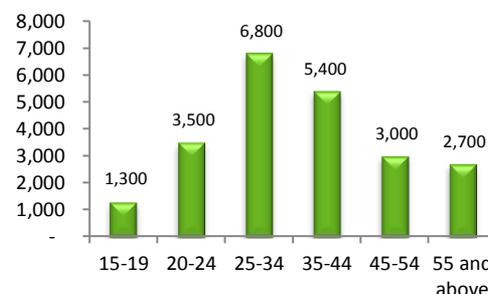
**Operatives:** truck drivers

**Labourers:** construction labourers.

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

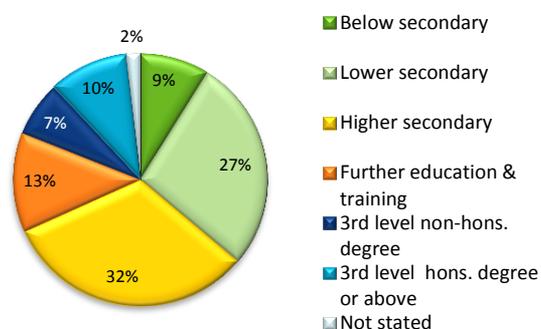
- In August 2012, there were 35,000 persons on the Live Register in the Midland region; of these, 19% were under 25 and 62% were male
- In quarter 1 2012, there were almost 23,000 unemployed persons in the Midland region in ILO terms
  - 21% of unemployed persons were under 25, with the highest share (almost one third) aged 25-34
  - Over one third of unemployed persons held less than higher secondary education qualifications
  - 27% had previously been employed in construction, while a further 15% had been in the wholesale and retail trade and 14% in industry
- The highest level of unemployment was in the following occupations: craft (carpenters), sales (sales assistants), elementary (construction labourers).

Figure 6.8 Unemployment by age (Midlands), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 6.9 Unemployment by education (Midlands), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 6.10a PES job seekers, Sept 2012

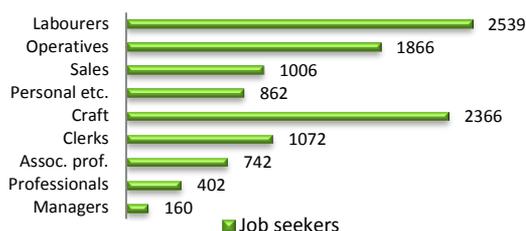
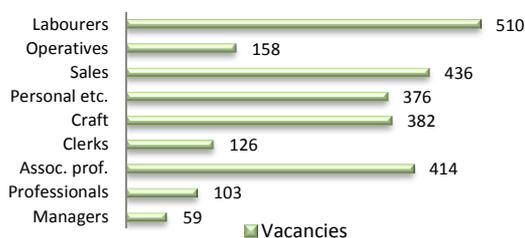


Figure 6.10b PES vacancies, Jan-Sept 2012



- In September 2012, 11,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as labourers (construction, process plant), craftpersons (carpenters, bricklayers) or operatives (process operatives)
- Between Jan - Sept 2012, 2,500 vacancies were advertised through DSP/ FÁS (Jobs Ireland); the highest number of vacancies was for labourers (kitchen & catering assistants, waiting staff), sales staff (credit collectors, sales assistants), associate professionals (business sales executives, marketing associate professionals) and craft workers (chefs, metal workers/fitters).

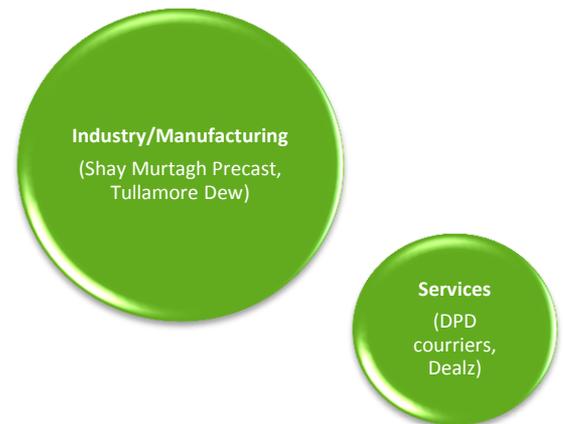
Source: Analysis by FÁS (SLMRU) based on DSP/FAS data



## Midlands

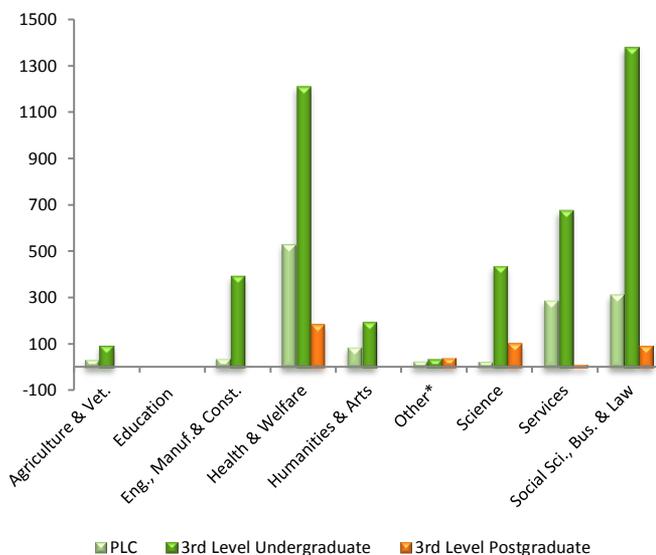
- Over the period quarter 1 2011 to quarter 1 2012, employment levels in the Midland region remained relatively unchanged (+0.6%); employment increased in many sectors, growing the strongest in the ICT (although from a small base) and accommodation and food services sectors; employment declined in the professional and administrative services, healthcare, financial and construction (although at a lower rate than in preceding years) sectors
- Recent job announcements suggest that over the short to medium term job opportunities will arise in the manufacturing and services sectors.

Figure 6.11 Job creation announcements



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

Figure 6.12 PLC Course & Higher Education Enrolments (Midland), 2011

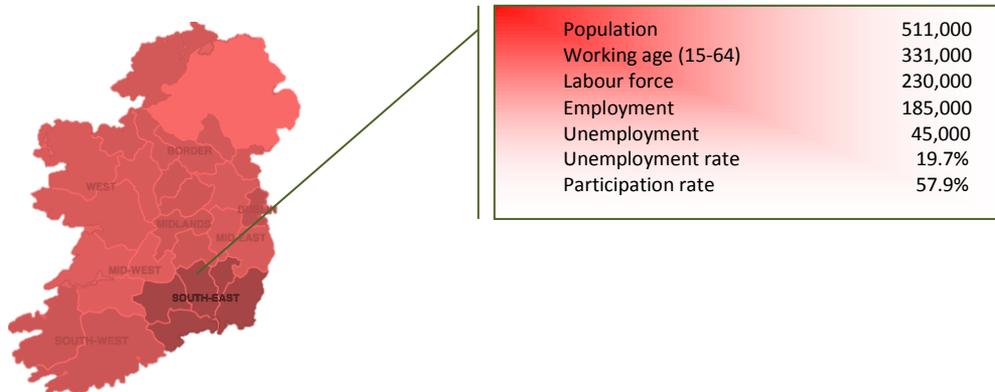


Source: DES, HEA

\*The 'Other' category includes broad and combined fields of learning

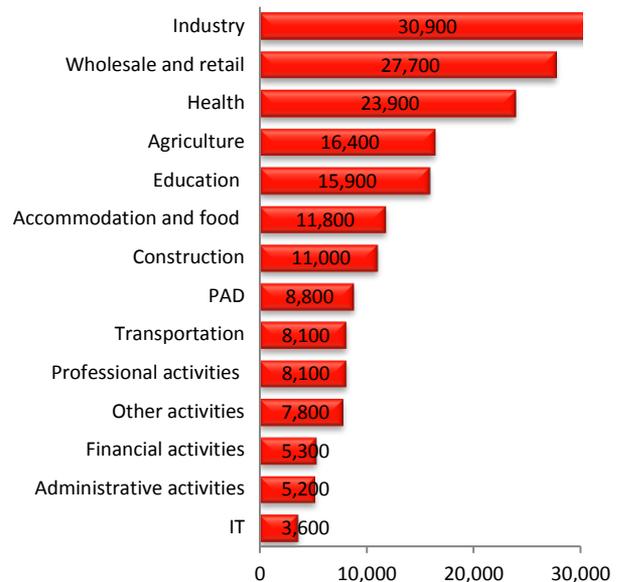
- In 2011, there were over 6,200 enrolments in selected further and higher education and training in the Midland region:
  - almost 1,400 PLC students
  - over 4,400 undergraduates
  - over 400 postgraduates
- The health and welfare field had the highest number of enrolments in the PLC sector, mostly for nursing/caring courses
- At undergraduate level, almost one third of all students (1,400 enrolments) were in social science, business and law and more than a quarter were in health & welfare
- The highest number of enrolments at postgraduate level was in health and welfare (mostly nursing/caring); almost a quarter was in science.

## 7. South East



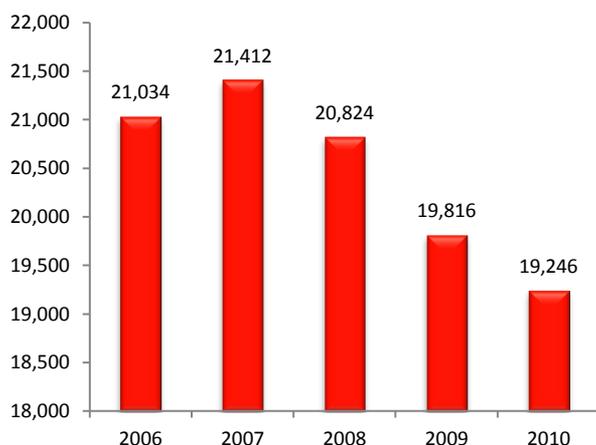
- In quarter 1 2012, the public sector (PAD, health and education combined) accounted for over a quarter of the workforce in the South East region, with almost 50,000 persons employed
- Outside the public sector, industry and wholesale/retail were the largest sectors, accounting for 17% and 15% of region's employment respectively; the South East had the highest share of persons employed in agriculture
- High value added sectors (professional, financial and IT activities) accounted for a total of 9% of the region's employment.

Figure 7.1 Employment by broad economic sector (South East), Q1 2012



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

Figure 7.2 Active enterprises (excludes public sector and agriculture)



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

- In 2010, there were over 19,000 active enterprises outside agriculture and the public sector in the South East region
- 92% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by over 2,000 between 2007 and 2010
- Between 2009 and 2010, the number of active enterprises in construction alone declined by almost 600
- The largest number of active enterprises was in wholesale/retail and construction (4,800 and 4,600 respectively).

Figure 7.3 Sectors with largest enterprises

- In the South East region, the highest number of medium to large enterprises (employing more than 50 persons) was found in manufacturing and wholesale and retail
- There are also some medium to large enterprises in accommodation and food services and in transport and storage.



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 7.4a Industrial units

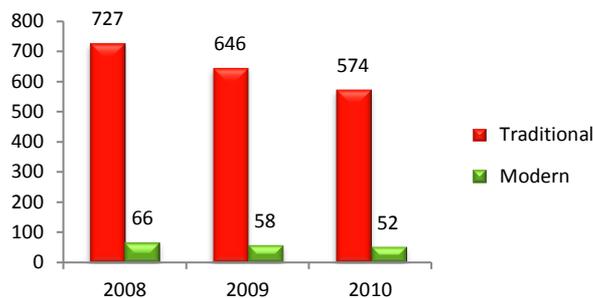
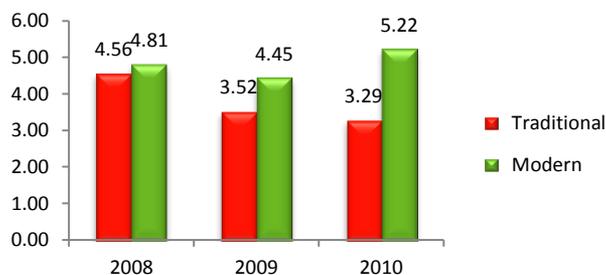


Figure 7.4b Gross output in industrial units (€ billion)

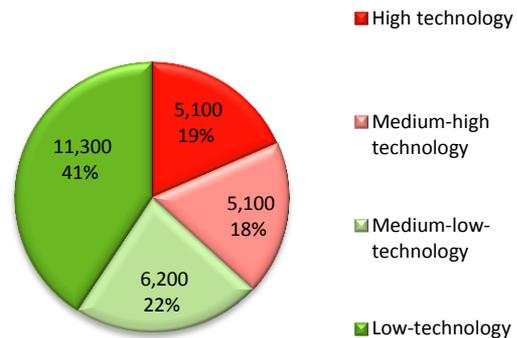


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 92% of all industrial units (manufacturing, energy and utilities) in the South East region were in the traditional sector
- While less than 10% of industrial units were in the modern industry sector, they produced just over 60% of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with both sectors (modern and traditional) declining by a similar magnitude (-21%)
- Although the number of industrial units declined, the value of gross output in the modern sector increased between 2009 and 2010 from €4.45 billion to €5.22 billion.

- In quarter 1 2012, almost 28,000 persons in the South East region were employed in manufacturing
- Over 40% were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.); 22% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); just under 20% each were employed in medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.).

Figure 7.5 Manufacturing employment (South East), Q1 2012



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

Figure 7.6 Employment by broad occupation (South East), Q1 2012



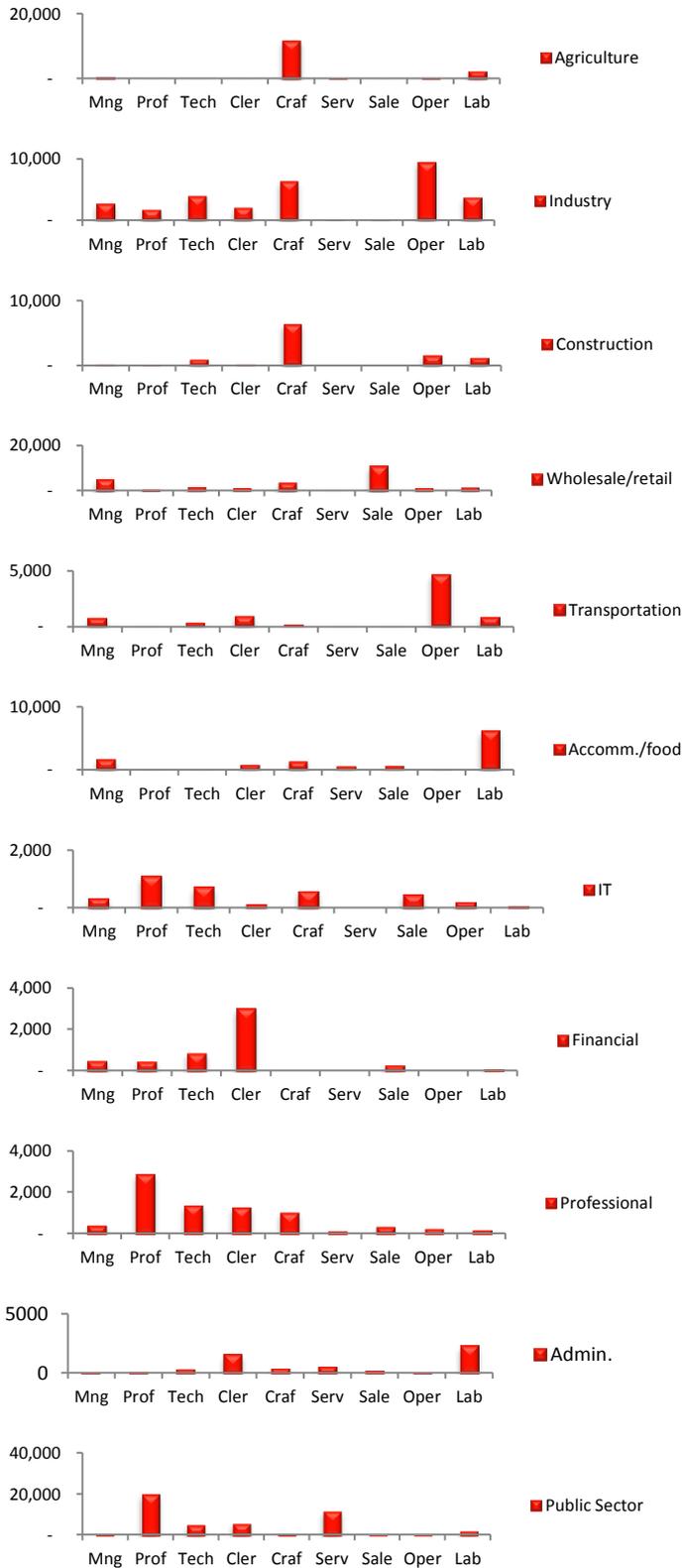
- In quarter 1 2012, 34,600 persons (one in five) in the South East region were employed in skilled trades; of these almost one third were farmers
- The South East region had one of the lowest shares of white collar workers (managers, professionals, associate professionals and clerks combined) at 42% and the highest share of persons employed as operatives and labourers (at 23%).

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



South East

Figure 7.7 Employment by broad occupation and sector (South East) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was provided by the ICT, financial, professional services, industry and public sector
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers

**Professionals:** nurses, teachers, accountants

**Technicians:** business sales executives

**Clerks:** Government clerks, personal assistants (PAs)

**Craft:** farmers, mechanics

**Services:** care workers, hairdressers

**Sales:** retail assistants

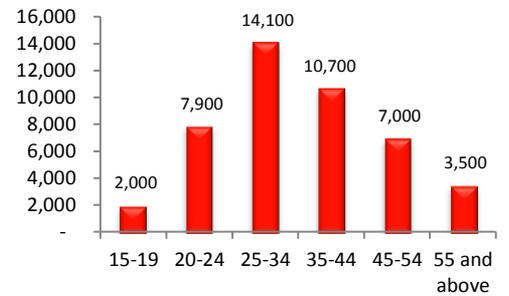
**Operatives:** truck drivers, assemblers, food processing operatives

**Labourers:** construction labourers, cleaners, waiters.

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

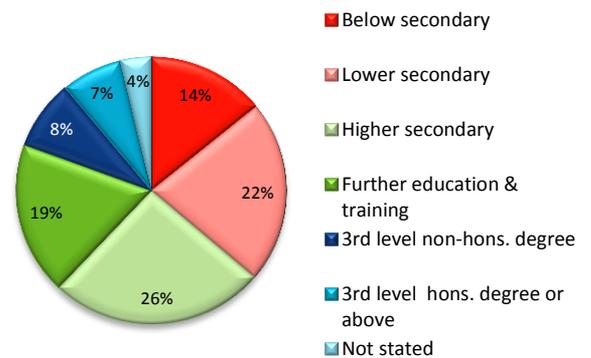
- In August 2012, there were almost 60,000 persons on the Live Register in the South East region; of these, 18% were under 25 and 63% were male
- In quarter 1 2012, there were just over 45,000 unemployed persons in the South East region in ILO terms
  - 22% of the unemployed persons were under 25, with the highest share (almost one third) aged 25-34
  - Over one third of the unemployed persons holds less than higher secondary education qualifications
  - 29% was previously employed in construction, while further 12% in industry and 11% in wholesale and retail trade
- The highest level of unemployment was in the following occupations: craft (carpenters, electricians, plasterers, bricklayers), sales (sales assistants), elementary (construction labourers).

Figure 7.8 Unemployment by age (South East), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 7.9 Unemployment by education (South East), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 7.10a PES job seekers, Sept 2012

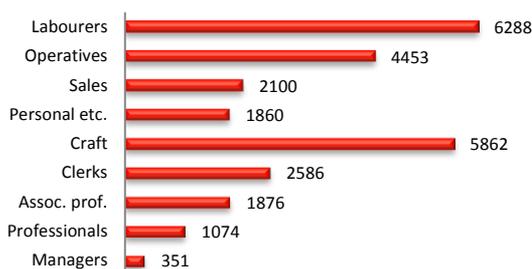
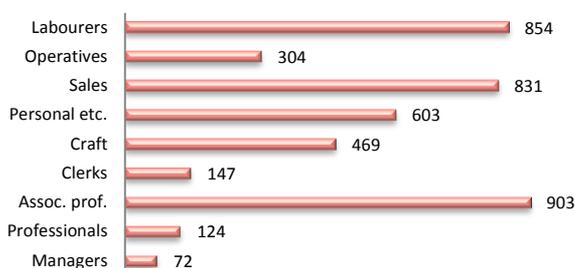


Figure 7.10b PES vacancies, Jan-Sept 2012



Source: Analysis by FÁS (SLMRU) based on DSP/FAS data

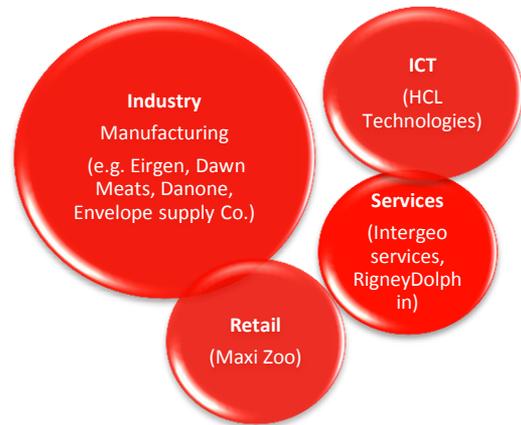
- In September 2012, 26,500 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as labourers (process plant, construction), craft (carpenters, bricklayers) or operatives (process operatives)
- Between Jan - Sept 2012, 4,300 vacancies were advertised through DSP/FÁS (Jobs Ireland); the highest number of vacancies was for associate professionals (business sales executives, marketing associate professionals), labourers (kitchen & catering assistants, waiting staff) sales staff (credit collectors, sales assistants) and personal services (care workers/home carers).



South East

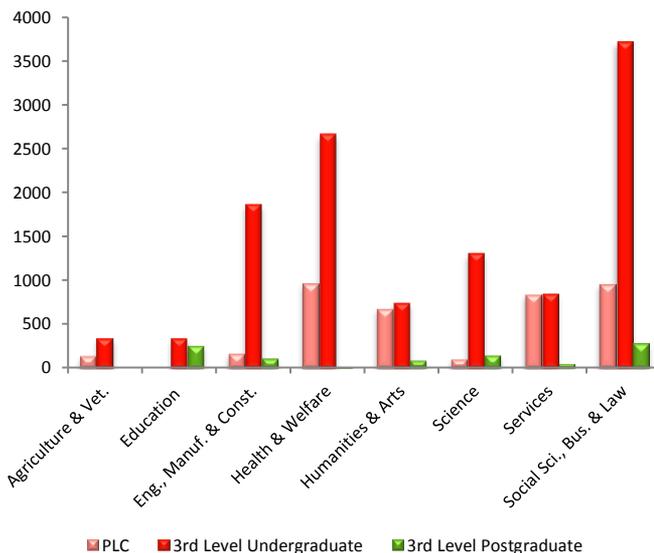
Figure 7.11 Job creation announcements

- Over the period quarter 1 2011 to quarter 1 2012, employment declined by 2%; however employment growth varied by sector:
  - employment increased in the transport, industry, professional services, accommodation/food services and healthcare sectors, with the strongest growth in transport (+20%)
  - employment declined in all other sectors, with the greatest decline in construction (-18%)
- Recent job announcements suggest that over the short to medium term job opportunities will arise in industry (food manufacturing, bio-pharma and other manufacturing), ICT, retail and the services sector.



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

Figure 7.12 PLC Course & Higher Education Enrolments (Border), 2011



Source: DES, HEA

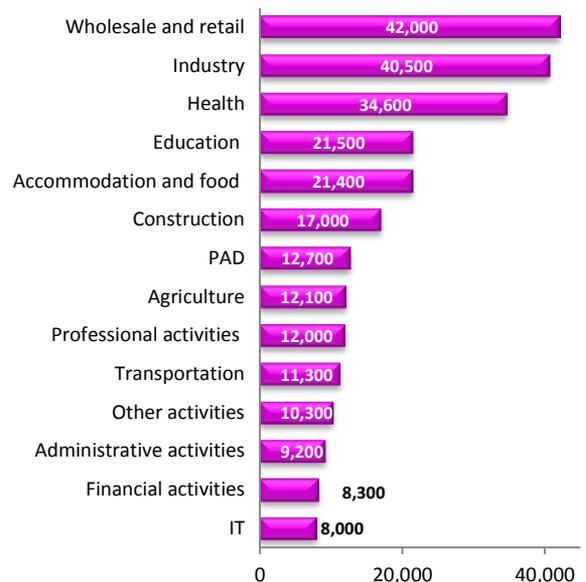
- In 2011, there were almost 17,000 students enrolled in selected further and higher education and training in the South East:
  - almost 4,000 PLC enrolments
  - almost 12,000 undergraduates
  - almost 1,000 postgraduate
- In the PLC sector, two fields accounted for approximately one half of all enrolments: health and welfare and social science, business and law
- One third of all undergraduates were in the social science, business and law field, followed by health and welfare (a fifth of all undergraduate enrolments)
- At postgraduate level, the highest number of enrolments was for social science, business and law (30%), followed by education (more than a quarter).

## 8. South West



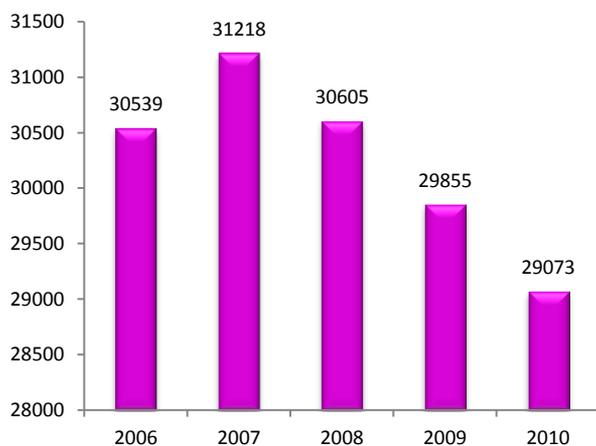
- In quarter 1 2012, employment in the public sector (PAD, health and education combined) in the South West region accounted for over a quarter of the total workforce; at almost 69,000 persons, this region had the second largest numbers employed in the public sector after Dublin
- After the public sector, industry and the wholesale/retail sectors were the largest sectors, each accounting for 16% of the region's employment
- High value added sectors (professional, financial and IT activities) accounted for 11% of the region's employment.

Figure 8.1 Employment by broad economic sector (South West), Q1 2012



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

Figure 8.2 Active enterprises (excludes public sector & agriculture)

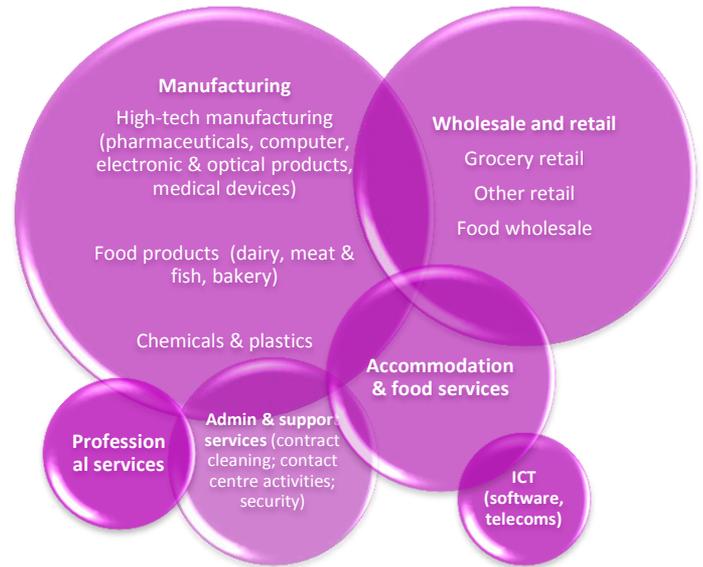


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, there were just over 29,000 active enterprises outside agriculture and the public sector in the South West region
- 91% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by over 2,000 between 2007 and 2010
- Between 2009 and 2010, the number of active enterprises in construction alone declined by over 700
- The largest number of active enterprises were in wholesale and retail and construction (6,500 in each).

Figure 8.3 Sectors with largest enterprises

- The highest number of medium to large enterprises (employing more than 50 persons) in the South West region is found in manufacturing, wholesale and retail, and accommodation & food services.
- There are also some medium to large enterprises in administrative & support services, professional services, ICT activities.



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 8.4a Industrial units

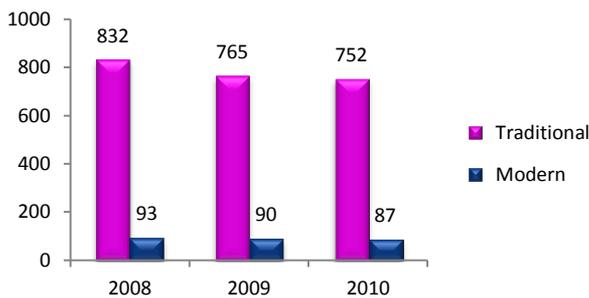
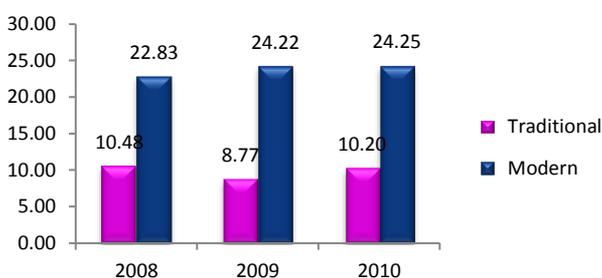


Figure 8.4b Gross output in industrial units (€ billion)

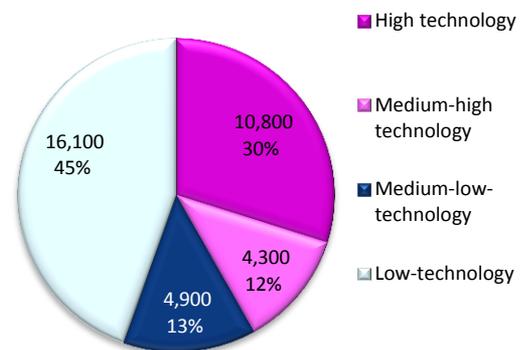


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 90% of all industrial units (manufacturing, energy and utilities) in the South West region were in the traditional sector
- While 10% of industrial units were in the modern industry sector, they produced 70% of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with the traditional sector declining faster than the modern sector (10% vs. 6%)
- Although the number of industrial units declined slightly between 2009 and 2010, the value of gross output in the modern sector remained unchanged at €24 billion; the value of gross output in the traditional sector increased from €8.77 billion to €10.2 billion, despite the number of industrial units declining by 13.

Figure 8.5 Manufacturing employment (South West), Q1 2012

- In quarter 1 2012, 36,000 persons in the South West region were employed in manufacturing
- 30% were employed in high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.); 25% were employed in medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) combined; 45% were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.).



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

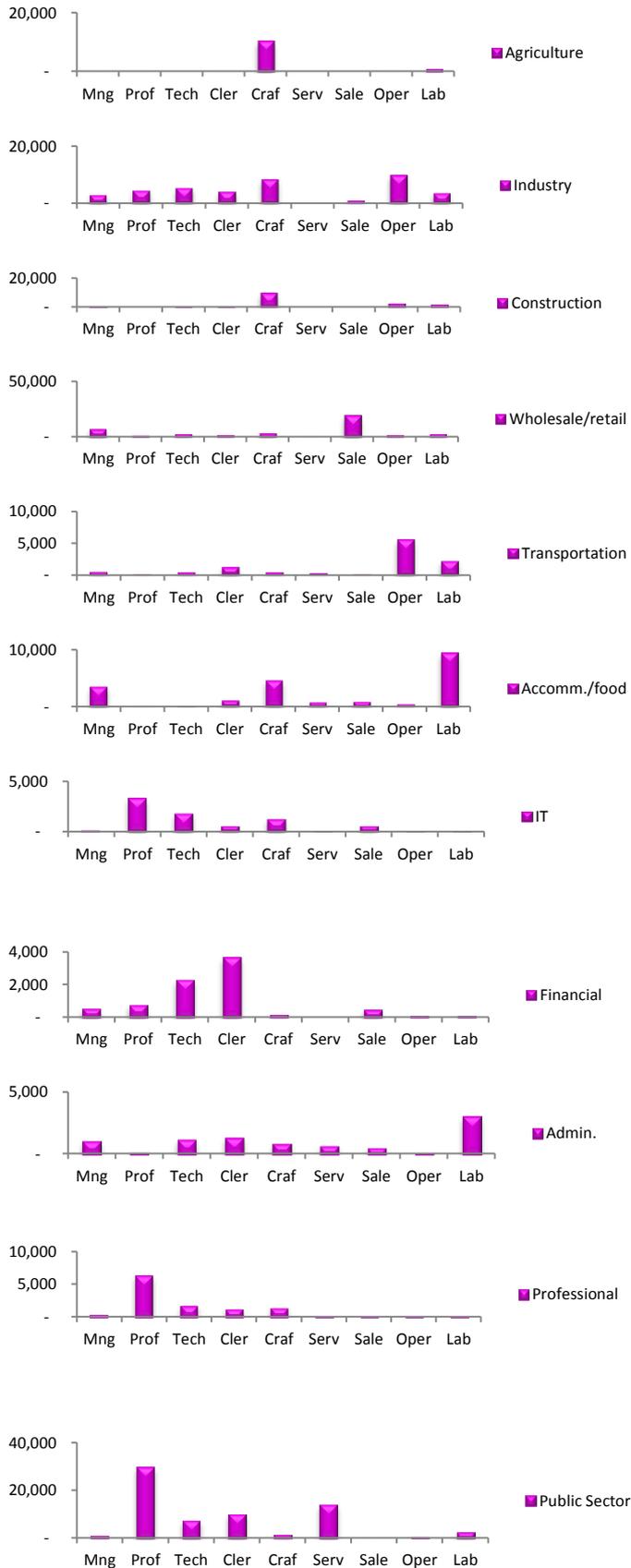
Figure 8.6 Employment by broad occupation (South West), Q1 2012



- In quarter 1 2012, 47,700 persons (or 18%) in the South West region were employed in professional occupations; of these, 60% were employed in the health and education sectors
- Over 43,000 were employed in skilled trades; a quarter of these were employed as farmers
- Operatives and labourers accounted for 20% of the total employment.

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

Figure 8.7 Employment by broad occupation and sector (South West) (000s), Q1 2012



- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was provided by the IT, financial, professional and administrative services, industry and the public sector
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers.
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** functional managers, retail managers, shopkeepers

**Professionals:** nurses, teachers, accountants

**Technicians:** business sales executives, Gardaí

**Clerks:** Government clerks, personal assistants (PAs), payroll clerks, bank clerks

**Craft:** farmers, chefs, carpenters, electricians, metal working production and maintenance fitters

**Services:** care workers, hairdressers, childminders, education assistants

**Sales:** retail assistants

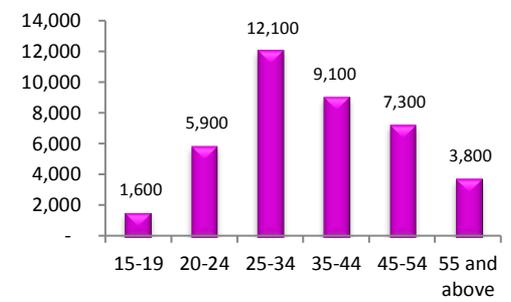
**Operatives:** taxi drivers, food processing operatives, truck drivers

**Labourers:** construction labourers, cleaners, waiters and bar staff, storage labourers, catering assistants.

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

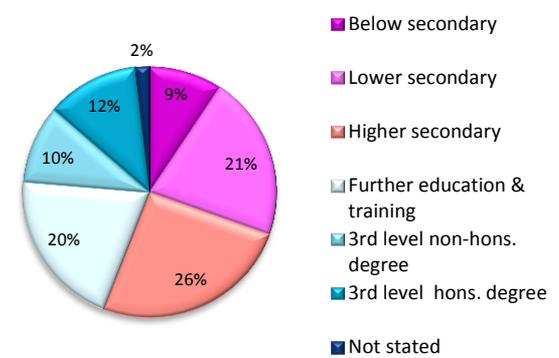
- In August 2012, there were 61,000 persons on the Live Register in the South West region; of these, 16% were under 25 and 63% were male
- In quarter 1 2012, there were almost 40,000 unemployed persons in the South West region in ILO terms
  - 19% of unemployed persons were under 25, with the highest share (30%) aged 25-34
  - 30% of unemployed persons held less than higher secondary education qualifications
  - 27% had previously been employed in construction, while a further 14% had been employed in the wholesale and retail trade and 11% in industry
- The highest level of unemployment was in the following occupations: craft (carpenters, bricklayers, plasterers), sales (sales assistants), elementary (construction labourers, cleaners).

Figure 8.8 Unemployment by age (South West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 8.9 Unemployment by education (South West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 8.10a PES job seekers, Sept 2012

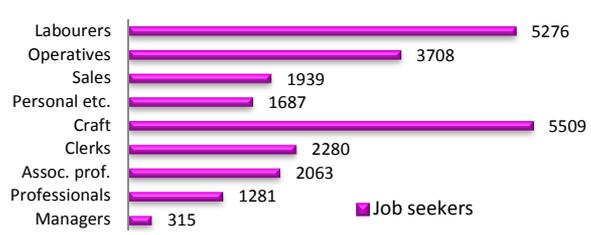
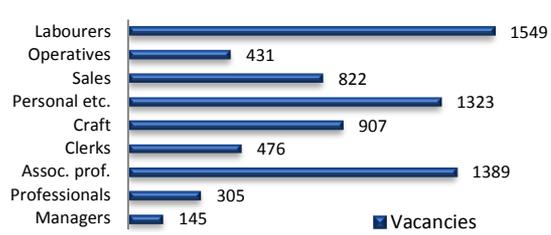


Figure 8.10b PES vacancies, Jan-Sept 2012



- In September 2012, 24,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as craftpersons (carpenters, bricklayers), labourers (construction, process plant) or operatives (process operatives)
- Between Jan - Sept 2012, 7,300 vacancies were advertised through DSP/ FÁS (Jobs Ireland); the highest number of vacancies was for labourers (kitchen & catering assistants, security guards), associate professionals (business sales executives, IT support technicians), personal services (care workers & home carers, nursing assistants) and craft workers (chefs, metal workers).

Source: Analysis by FÁS (SLMRU) based on DSP/FAS data

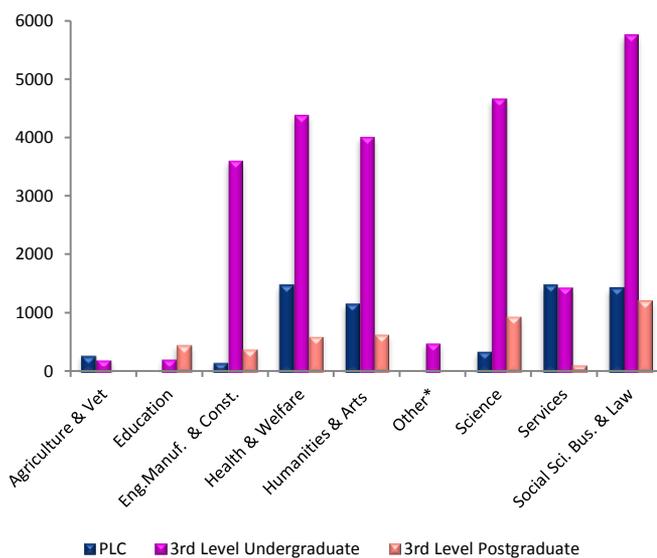
- Over the period quarter 1 2011 to quarter 1 2012, employment increased by 1%; however, employment growth varied by sector:
  - employment increased in the accommodation/food services sector transportation, healthcare, administrative and professional services and industry, with the strongest growth in accommodation and food services(+28%)
  - employment remained relatively stable (with a change of less than 2%) in the education, ICT, financial and wholesale/retail sectors
  - employment declined in other sectors, with the greatest decline in agriculture (-26%)
- Recent job announcements suggest that over the short to medium term industry will continue to perform well in the areas of bio-pharma, energy and other manufacturing; job opportunities will also arise in ICT, retail, construction and the services sector (particularly in the area of customer care).

Figure 8.11 Job creation announcements



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

Figure 8.12 PLC Course & Higher Education Enrolments (South West), 2011

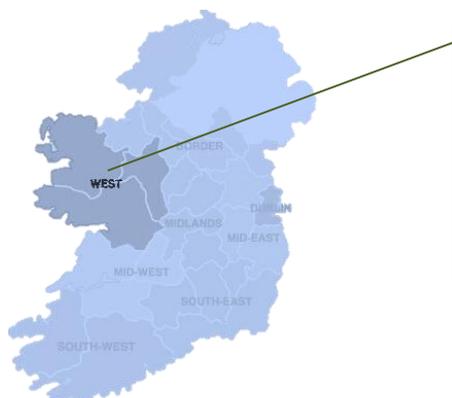


Source: DES, HEA

\*The 'Other' category includes broad and combined fields of learning

- In 2011, there were almost 36,000 students enrolled in selected further and higher education and training in the South West region
  - over 6,300 PLC students
  - almost 25,000 undergraduates
  - over 4,000 postgraduates
- In the PLC sector, enrolments were concentrated in three fields: services, health and welfare and social science, business and law; each of these fields had between 1,400 and 1,500 enrolments
- At undergraduate level, social science, business & law had the highest number of enrolments (almost a quarter, or 5,800), followed by science (almost 4,700) and health & welfare (almost 4,400).
- At postgraduate level, social science, business and law (at almost 1,200) accounted for more than one quarter of postgraduate enrolments; over a fifth were in science (over 900 enrolments).

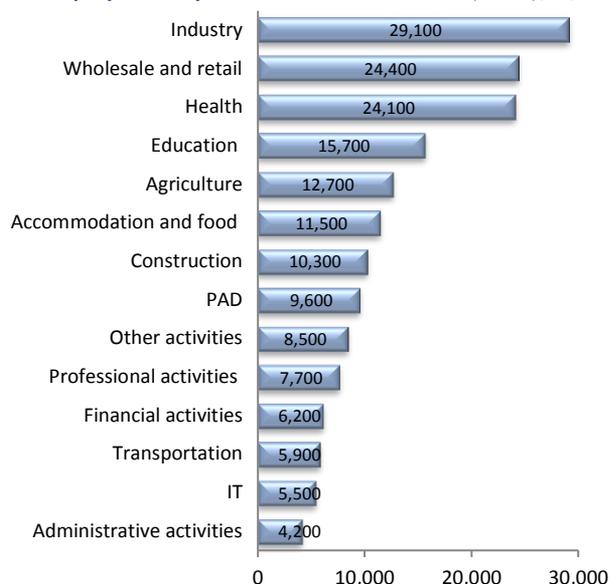
## 9. West



|                     |         |
|---------------------|---------|
| Population          | 430,000 |
| Working age (15-64) | 281,000 |
| Labour force        | 209,000 |
| Employment          | 175,000 |
| Unemployment        | 33,000  |
| Unemployment rate   | 15.9%   |
| Participation rate  | 61.9%   |

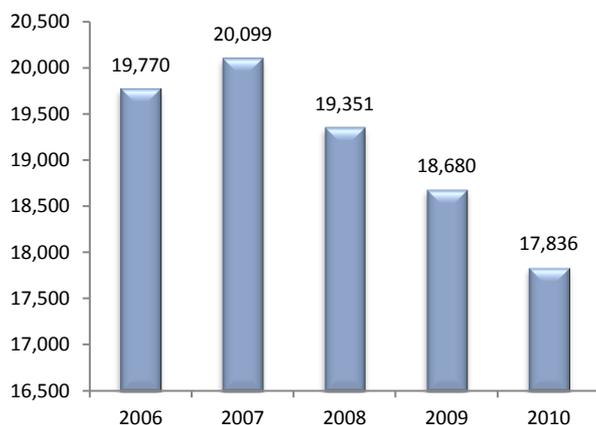
- In quarter 1 2012, the public sector (PAD, health and education combined) accounted for 28% of total employment in the West region, employing almost 50,000 persons
- Aside from the public sector, industry and the wholesale/retail sectors were the largest sectors, accounting for 17% and 14% of the region's employment respectively
- High value added sectors (professional, financial and IT activities) accounted for 11% of employment in the West region.

Figure 9.1 Employment by broad economic sector (West), Q1 2012



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

Figure 9.2 Active enterprises (excludes public sector & agriculture)

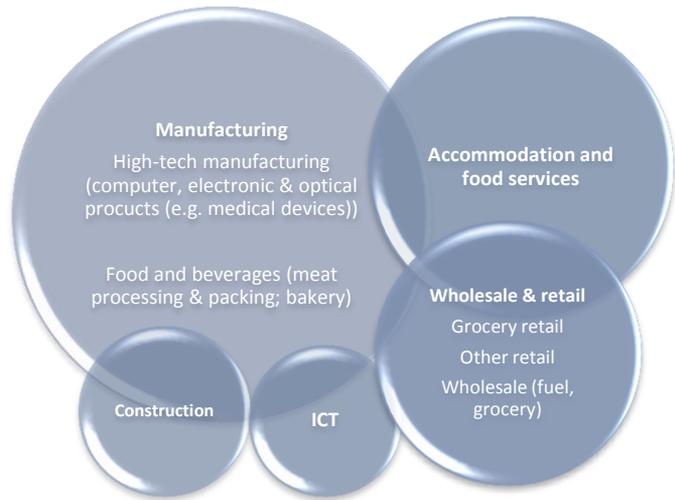


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, there were almost 18,000 active enterprises outside agriculture and public sector, in the West region
- 92% of active enterprises employed fewer than 10 persons and less than 1% employed 250 persons or more
- The number of active enterprises declined by over 2,000 between 2007 and 2010
- The number of active enterprises in construction alone declined by almost 700 between 2009 and 2010
- The largest number of active enterprises were in construction and wholesale and retail (approx. 4,500 and 4,000 respectively).

Figure 9.3 Sectors with largest enterprises

- The highest number of medium to large enterprises (employing more than 50 persons) in the West region is found in manufacturing, accommodation and food services, and wholesale and retail activities
- There are also some medium to large enterprises in construction and ICT activities (e.g. software development, telecommunications).



Source: Analysis by FÁS (SLMRU) based on Data Ireland database

Figure 9.4a Industrial units

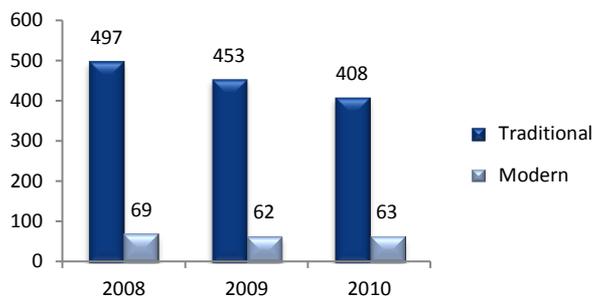
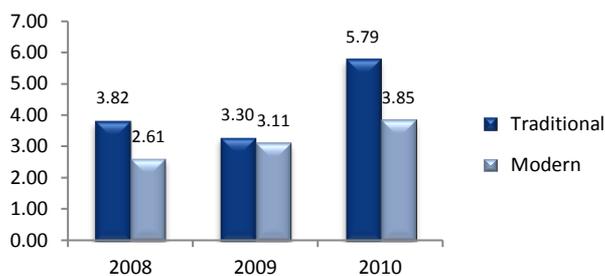


Figure 9.4b Gross output in industrial units (€ billion)

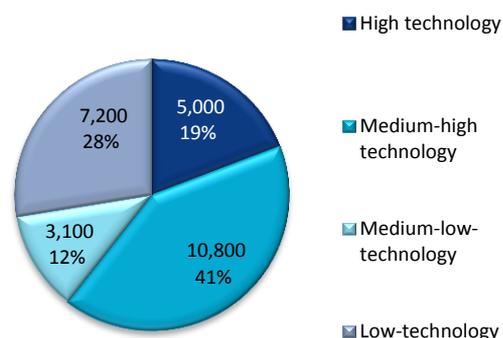


Source: Analysis by FÁS (SLMRU) based on CSO data

- In 2010, 87% of all industrial units (manufacturing, energy and utilities) in the West region were in the traditional sector
- While the modern industry sector accounted for 13% of industrial units, it produced 40% of the regional gross industrial output value in 2010
- The number of industrial units declined between 2008 and 2010, with the traditional sector declining faster than the modern sector (-18% vs. -9%)
- Although the number of industrial units declined by 45 between 2009 and 2010, the value of gross output in the traditional sector increased from €3.3 billion to €5.79 billion.

- In quarter 1 2012, 26,000 persons in the West region were employed in manufacturing
- Employment was greatest in medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment etc.) at almost 11,000 persons; at 41% the West region had by far the highest share employed in this sector; a further 19% were employed in high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) while medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) and low-tech manufacturing (e.g. food processing, wood, printing etc.) accounted for 12% and 28% respectively.

Figure 9.5 Manufacturing employment (West), Q1 2012



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

Figure 9.6 Employment by broad occupation (West), Q1 2012

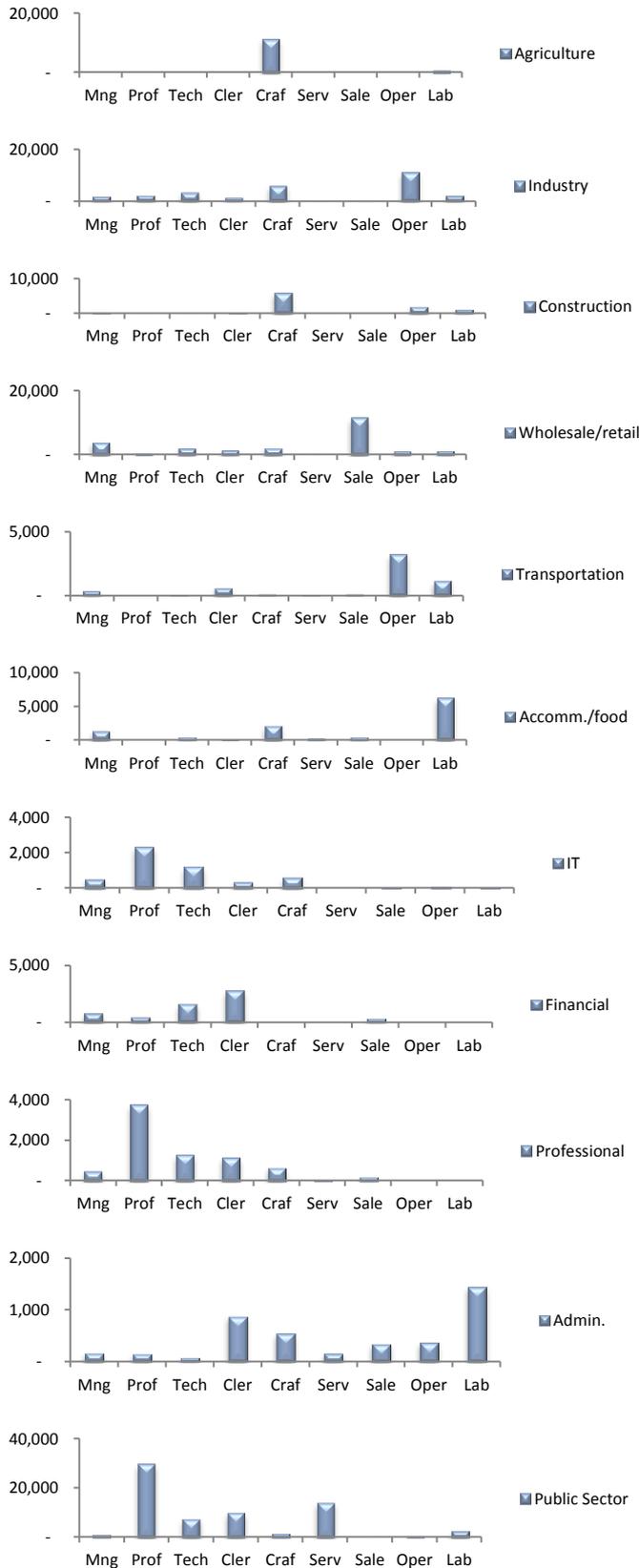


- In quarter 1 2012, 31,000 persons in the West region were employed in skilled trades; of these over one third were farmers
- White collar workers (managers, professionals, associate professionals and clerks combined) accounted for 45% of the total employment in the region; of these professionals were the largest occupation group with 30,800 persons employed
- Operatives and labourers accounted for 21% of the total employment.

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



Figure 9.7 Employment by broad occupation and sector (West) (000s), Q1 2012



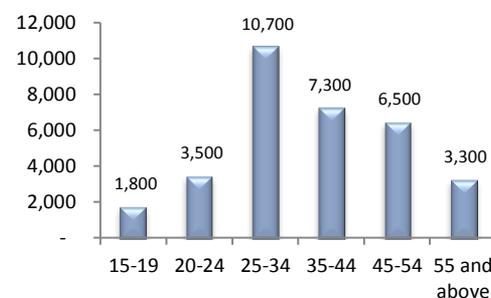
- In quarter 1 2012, white collar employment (managers, professionals, associate professionals and clerks combined) was provided by the IT, financial, professional and public sector
- Most persons employed in wholesale/retail, transport, and accommodation/food services work in low skilled occupations as service and sales workers, operatives and labourers.
- Within occupational groups, the highest employment was in the following occupations:

**Managers:** shopkeepers  
**Professionals:** nurses, teachers  
**Technicians:** business sales executives  
**Clerks:** Government clerks, PAs, bank clerks  
**Craft:** farmers  
**Services:** care workers, hairdressers  
**Sales:** retail assistants  
**Operatives:** assemblers, truck drivers  
**Labourers:** construction labourers, cleaners, catering assistants, waiters and bar staff.

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

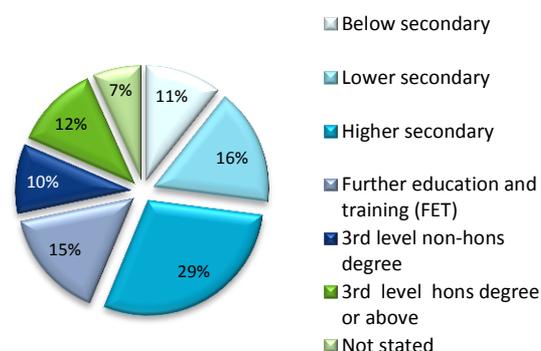
- In August 2012, there were almost 42,000 person on the Live Register in the West region; of these, 17% were under 25 and 61% were male
- In quarter 1 2012, there were 33,000 unemployed persons in the West region in ILO terms
  - 16% of the unemployed persons were under 25, with the highest share (almost one third) aged 25-34
  - over one in four of unemployed persons held less than higher secondary education qualifications
  - 27% had previously been employed in construction, while a further 14% in industry and 12% in wholesale and retail trade
- The highest level of unemployment was in the following occupations: craft (carpenters, bricklayers), sales (sales assistants), elementary (construction labourers).

Figure 9.8 Unemployment by age (West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 9.9 Unemployment by education (West), Q1 2012



Source: Analysis by FÁS (SLMRU) based on CSO

Figure 9.10a PES job seekers, Jan-Sept 2012

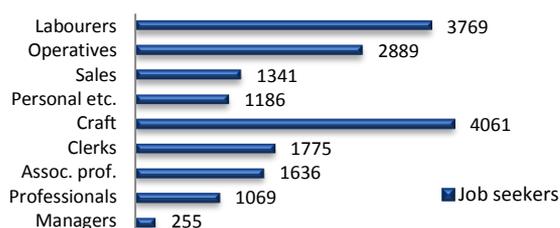
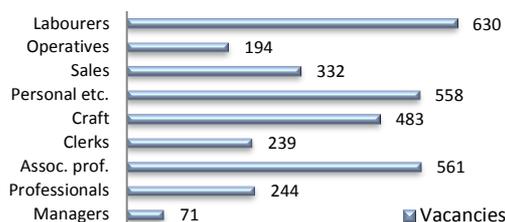


Figure 9.10b PES vacancies, Sept 2012

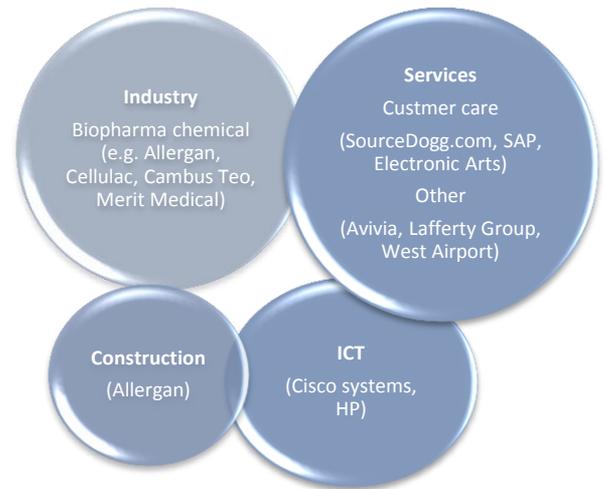


Source: Analysis by FÁS (SLMRU) based on DSP/FAS data

- In September 2012, 18,000 job seekers were registered with DSP/FÁS; the highest number of job seekers had previously worked as craftspersons (carpenters, bricklayers, painters), labourers (process plant, construction) or operatives (process operatives)
- Between Jan - Sept 2012, 3,300 vacancies were advertised through DSP/FÁS (Jobs Ireland); the highest number of vacancies was for labourers (kitchen & catering assistants, cleaners), associate professionals (business sales executives, marketing associate professionals), personal services (care workers, home carers) and craft workers (chefs, mechanics).

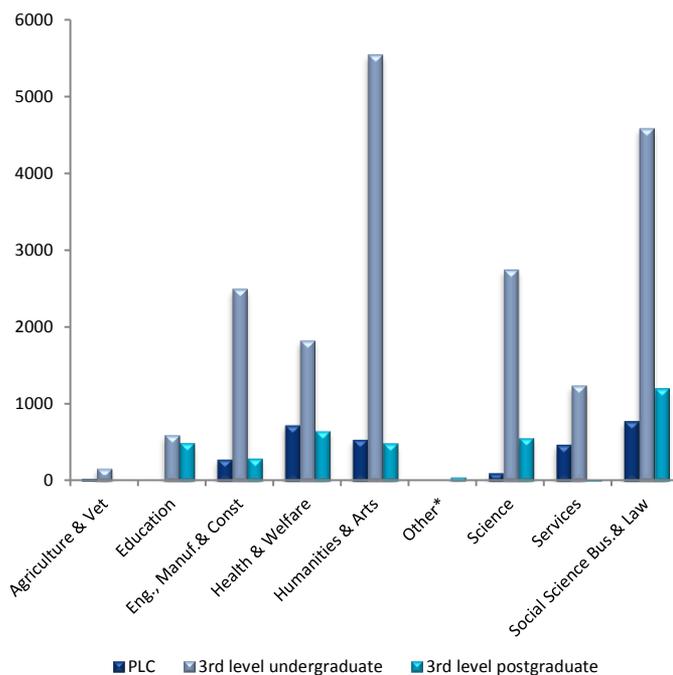
Figure 9.11 Job creation announcements

- Over the period quarter 1 2011 to quarter 1 2012, employment remained relatively unchanged (declining by 0.5%); however, employment change varied by sector:
  - employment increased in the financial, agriculture, PAD, industry, accommodation/food services, administrative and healthcare sectors, with the strongest growth in the financial sector (+16%)
  - employment declined in all other sectors, with the greatest decline in ICT (-16%, albeit from a relatively small base)
- Recent job announcements suggest that over the short to medium term job opportunities will arise in the bio-pharma sector, ICT, construction and the services sector (particularly in the area of customer care, but also other services).



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

Figure 9.12 PLC Course & Higher Education Enrolments (West), 2010/11



Source: DES, HEA

The 'Other' category includes broad and combined fields of learning

- There were almost 26,000 students enrolled in selected further and higher education and training in the West region in 2010/11; of these, there were
  - almost 3,000 PLC enrolments
  - over 19,200 undergraduates
  - 3,700 postgraduates
- On PLC courses, more than one half of learners were enrolled in either the social science, business and law field or the health and welfare field of learning
- At undergraduate level, humanities and arts had the highest number of enrolments (approximately 6,000 or 29% of the total)
- At postgraduate level, the highest number of enrolments, amounting to almost a third of the total, was for social science, business and law.

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

|                    |   |
|--------------------|---|
| Una Halligan       | Chairperson   |
| Marie Bourke       | Head of Secretariat & Dept. Manager, Education, Skills and Labour Market Policy, Forfás |
| Inez Bailey        | Director, National Adult Literacy Agency  |
| Peter Baldwin      | Assistant Secretary, Department of Education and Skills                                 |
| Ray Bowe           | IDA Ireland   |
| 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 of Cook Medical, Europe; Chief Executive Cook Ireland          |
| Tony Donohoe       | Head of Education, Social and Innovation Policy, IBEC                                   |
| Dr Bryan Fields    | Director, Curriculum Development/Programme Innovation, FÁS                              |
| Sonia Flynn        | EMEA Director, Facebook   |
| Anne Forde         | Principal Officer, Department of Education and Skills                                   |
| Joanna Gardiner    | Managing Director, Ovelle Pharmaceuticals   |
| Joe Hogan          | Chief Technology Officer, Openet  |
| Garry Keegan       | Director, Acumen  |
| Garrett Murray     | Enterprise Ireland  |
| John Martin        | Director for Employment, Labour & Social Affairs, OECD                                  |
| Frank Mulvihill    | Former President of the Institute of Guidance Counsellors                               |
| Dr Brendan Murphy  | President, Cork Institute of Technology   |
| Dermot Nolan       | Department of Public Expenditure and Reform   |
| Alan Nuzum         | Chief Executive Officer, Skillnets  |
| Muiris O'Connor    | Higher Education Authority  |
| Peter Rigney       | Industrial Officer, ICTU  |
| Martin D. Shanahan | Chief Executive, Forfás   |
| Jacinta Stewart    | Chief Executive, City of Dublin VEC   |

## Appendix 2: Recent Expert Group on Future Skills Needs Publications

| Report  | Publication Date |
|---|------------------|
| Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs  | July 2012        |
| National Skills Bulletin 2012   | July 2012        |
| Key Skills for Enterprise to Trade Internationally  | June 2012        |
| EGFSN Statement of Activity 2011  | April 2012       |
| Vacancy Overview 2011   | February 2012    |
| Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise <i>(Forfás report based on EGFSN identified future skills needs)</i> | February 2012    |
| Addressing High-Level ICT Skills Recruitment Needs: Research Findings   | January 2012     |
| Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs  | July 2011        |
| National Skills Bulletin 2011   | July 2011        |
| Developing Recognition of Prior Learning: The Role of RPL In the Context of the National Skills Strategy Upskilling Objectives                                | April 2011       |
| Vacancy Overview 2010   | March 2011       |
| Future Skills Needs of Enterprise within the Green Economy in Ireland   | November 2010    |
| Future Skills Requirements of the Biopharma-Pharmachem Sector   | November 2010    |
| Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2010  | July 2010        |
| National Skills Bulletin 2010   | July 2010        |
| Future Skills Needs of the Wholesale and Retail Sector  | May 2010         |
| Future Skills Requirements of the Food and Beverage Sector  | November 2009    |
| Skills in Creativity, Design and Innovation   | November 2009    |
| Monitoring Ireland's Skill Supply. Trends in Education and Training Outputs 2009  | November 2009    |
| National Skills Bulletin 2009   | July 2009        |
| A Quantitative Tool for Workforce Planning in Healthcare: Example Simulations   | June 2009        |
| A Review of the Employment and Skills Needs of the Construction Industry in Ireland   | December 2008    |
| Statement on Raising National Mathematical Achievement  | December 2008    |
| National Skills Bulletin 2008   | November 2008    |
| All-Island Skills Study   | October 2008     |

## Appendix 3: Glossary

The following abbreviations are used in throughout the document:

|          |  |
|----------|--|
| CSO      | Central Statistics Office  |
| DJEI     | Department of Jobs, Enterprise and Innovation                                    |
| DSP      | Department of Social Protection  |
| E        | Employment   |
| E rate   | Employment rate  |
| ESRI     | Economic and Social Research Institute   |
| ETB      | Education and Training Boards  |
| ILO      | International Labour Organization  |
| LF       | Labour Force   |
| LR       | Live Register  |
| NACE     | Nomenclature statistique des activités économiques dans la Communauté européenne |
| P rate   | Participation rate   |
| PAD      | Public Administration and Defence  |
| PES      | Public Employment Service  |
| PLC      | Post Leaving Certificate   |
| QNHS     | Quarterly National Household Survey  |
| SOC 2010 | Standard Occupational Classification 2010  |
| UE       | Unemployment   |

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