

Annual
Employment
Survey

2009

Contents

Executive Summary	3
Introduction	5
1. Employment Trends in Agency Assisted Companies, 2000 - 2009	6
1.1 Trends in Permanent, Full-time Employment, 2000 - 2009	6
1.2 Trends in Part-time, Temporary and Short-term Contract Employment, 2000 - 2009	7
1.3 Trends in Permanent, Full-time Employment in Manufacturing and Services Sectors, 2000 - 2009	8
1.4 Sectoral Trends in Permanent, Full-time Employment in Irish and Foreign-owned Companies, 2000 - 2009	9
1.5 Ownership Trends in Permanent, Full-time Employment in Manufacturing and Services Sectors, 2000 - 2009	9
1.6 Trends in Part-time, Temporary and Short-term Contract Employment in Manufacturing and Services Sectors, 2000 - 2009	10
1.7 Job Gains, Losses & Net Change in Permanent, Full-time Employment in All Agency Assisted Companies, 2000 - 2009	11
1.8 Job Gains, Losses & Net Change in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009	12
1.9 Job Gains, Losses & Net Change in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009	13
2. Regional Employment Trends in Agency Assisted Companies, 2000 - 2009	14
2.1 Region Trends in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009	14
2.2 Regional Trends in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009	15
3. Sectoral Employment Trends in Agency Assisted Companies, 2000 - 2009	16
3.1 Sectoral Trends in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009	16
3.2 Sectoral Proportions of Permanent, Full-time Employment in Irish-owned Companies, 2000 and 2009	17
3.3 Sectoral Analysis of Permanent, Full-time Employment in Irish-owned Companies, 2009	18
3.4 Sectoral Trends in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009	20
3.5 Sectoral Proportions of Permanent, Full-time Employment in Foreign-owned Companies, 2000 and 2009	21
3.6 Sectoral Analysis of Permanent, Full-time Employment in Foreign-owned Companies, 2009	22
APPENDICES - as part of a seperate document	
APPENDIX A: Agency Assisted Employment by Sector, 2000 - 2009	26
APPENDIX B: Agency Assisted Employment by Region, 2000 - 2009	35
APPENDIX C: Overview of Methodology and Definitions	44

Executive Summary

The Annual Employment Survey provides an analysis of employment levels in manufacturing and services companies under the remit of IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta¹. The main findings of the 2009 survey are set out below.

Overall

Total permanent, full-time employment in agency-assisted companies operating in the manufacturing and services sectors amounted to 272,053 in 2009. This is a decrease of 33,988 jobs (11.1 percent) on employment levels in 2008 and reflects the continued contraction in the economy throughout 2009. It follows net losses of 6,784 jobs in 2008. While there were employment losses due to plant closures in 2009, the majority of job losses, 83 percent, are being generated by companies who continue to trade but have reduced their staff numbers.

Total full-time employment among Irish-owned companies amounted to 132,596 in 2009, a decrease of 18,812 (12.4 percent) on the previous year. While large full-time employment losses were recorded in Irish-owned companies, the number of part-time temporary jobs increased 1.1 percent, in 2009. This suggests that people previously employed on a full-time basis are continuing to be employed, but on a part-time basis. Over the ten year period, 2000 to 2009, full-time employment has fallen by 13.5 percent (20,674 jobs).

Among foreign-owned companies, total full-time employment amounted to 139,457 in 2009, a decrease of 15,176 (9.8 percent) on the previous year. Foreign-owned temporary, part-time employment decreased by 15.5 percent, in 2009. Over the ten year period, 2000 to 2009, full-time employment in foreign-owned companies has decreased by 26,977 jobs or 16.2 percent.

Sectoral

The sectoral employment breakdown shows evidence of continuing structural change in agency assisted companies towards services sectors and a sharp decline in construction-related sectors in 2009.

Total full-time employment in the manufacturing sector decreased to 176,782 jobs in 2009, which was a net decrease of 26,622 jobs or 13 percent on 2008. Manufacturing employment in 2009 is 26.9 percent lower than the sector's employment level in 2000.

Net job losses were recorded in all manufacturing sub-sectors, in 2009, with the exception of medical devices, which showed a modest gain of 365 jobs (1.8 percent). The sectors that showed the most significant net employment losses were non-metallic mineral products (3,566 jobs), basic & fabricated metal products (3,111 jobs), computer, electronic & optical equipment (3,654 jobs) and food, drink & tobacco (2,169 jobs).

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

Total full-time employment in the services sectors decreased to 95,271 in 2009 which was a net decrease of 7,366 or 7.2 percent on 2008. This is an increase of 22 percent on employment levels in 2000. Services employment in 2009 is 22 percent higher than the sector's employment in 2000.

The services sectors also experienced job losses in all areas. Computer programming and computer consultancy recorded net losses of 1,122 and 2,911 jobs respectively, while business services were down 1,167 jobs (10 percent). Financial services and other IT & computer services showed some resilience, with employment losses of 972 jobs (4.6 percent) and 89 jobs (1.8 percent) respectively.

Regional

All regions have seen reductions in employment levels in 2009 and over the period 2000 to 2009. The South and East (S&E) region is the largest region representing 43 percent of agency employment (115,521 jobs), in 2009. The Border, Midlands and West (BMW) region accounts for 65,437 jobs (24 percent); the Dublin region accounts for the remaining 33 percent (91,095 jobs). A more detailed breakdown of these regions is presented in Appendix B.

Irish-owned manufacturing and services firms located in the S&E region recorded full-time job losses of 16.9 percent since 2000 a reduction of 10,932 jobs over the 10 years. Over the same period, the number employed full-time in the Dublin region has fallen by 7,853 jobs (16.3 percent), while the Irish-owned employment in the BMW region has reduced by 4.6 percent (1,889 jobs).

Foreign-owned manufacturing and services firms located in the BMW region recorded the largest proportional full-time job losses over the 10 year period 2000 to 2009, with job losses of 24.9 percent a reduction of 8,837 jobs. Over the same period, the number employed full-time in the S&E region has fallen by 10,875 jobs (14.9 percent), while the Irish-owned employment in the Dublin region has reduced by 12.5 percent (7,265 jobs).

Introduction

This document sets out the final results of the 2009 Annual Employment Survey². The survey is an annual census of employment in all manufacturing and services companies supported by the enterprise development agencies (IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta). The survey has been carried out each year since 1973. Forfás, in line with its mandate to co-ordinate the activities of Enterprise Ireland and IDA Ireland, continues to carry out the survey with the co-operation of Enterprise Ireland and IDA Ireland regional staff. Shannon Development and Údarás na Gaeltachta carry out the survey for companies falling within their remit and provide the results for inclusion in the Forfás database.

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

- Section 1 provides overall employment trends in manufacturing and services sectors, the results of which are broken down on the basis of Irish and foreign-ownership. Data on part-time, temporary and short-term contract employment are also provided for companies within the remit of Enterprise Ireland, IDA Ireland, Shannon Development³ and Údarás na Gaeltachta.
- Section 2 provides a regional analysis of permanent, full-time employment.
- Section 3 analyses permanent, full-time employment data on the basis of detailed industrial sector.

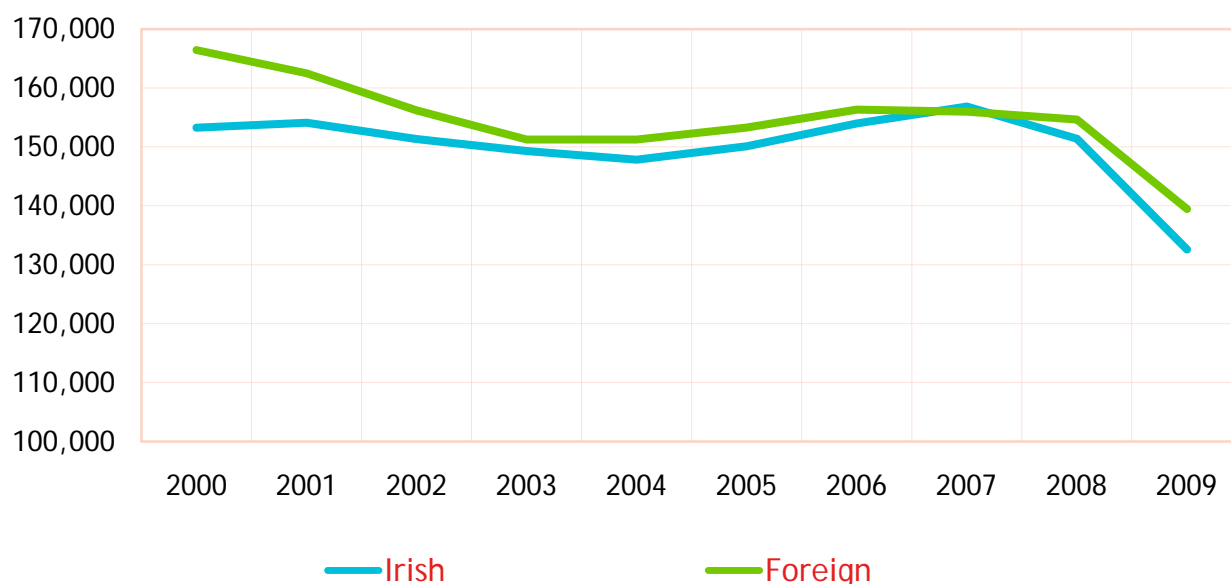
It should be noted that employment figures in this document may differ from those previously reported due to factors such as the inclusion of new companies, revisions made by companies during the survey or the transfer of companies between Irish and foreign ownership at the end of each survey year.

² An overview of this survey, together with the methodology and definitions used for each employee category is provided in Appendix 3.

³ Shannon Development have collected data on 'non permanent' forms of employment since 2000.

1. Employment Trends in Agency Assisted Companies, 2000 - 2009

1.1 Trends in Permanent, Full-time Employment, 2000 - 2009



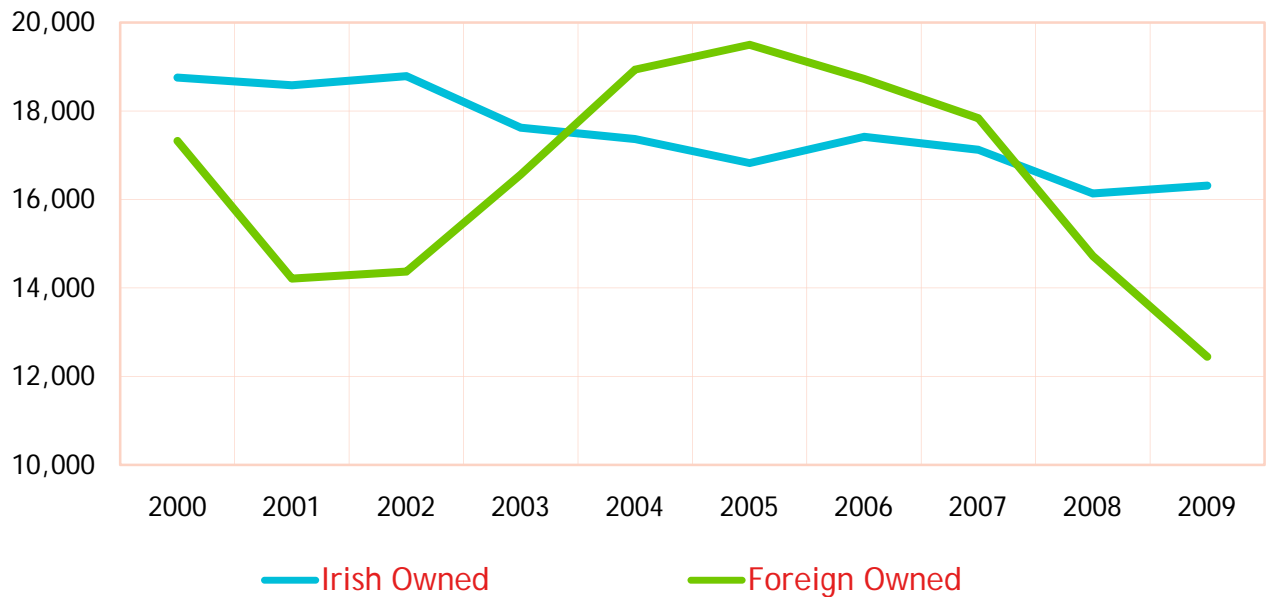
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Ownership	319,704	316,630	307,539	300,572	299,099	303,381	310,299	312,825	306,041	272,053
Irish	153,270	154,122	151,356	149,314	147,839	150,108	153,967	156,860	151,408	132,596
Foreign	166,434	162,508	156,183	151,258	151,260	153,273	156,332	155,965	154,633	139,457

Total permanent, full-time employment in agency assisted companies operating in the manufacturing and services sectors amounted to 272,053 in 2009, a decrease of 33,988 jobs (11.1 percent) on employment levels in 2008. Over the ten year period, illustrated above, employment has decreased by 14.9 percent from 319,704 jobs in 2000, to its current level.

Total full-time employment among Irish-owned companies amounted to 132,596 in 2009, a decrease of 18,812 on the previous year. This decline of 12.4 percent comes on top of a 3.5 percent fall in employment the previous year. Irish-owned companies' employment is currently 20,674 jobs or 13.5 percent lower than it was in 2000.

Among foreign-owned companies, total full-time employment amounted to 139,457 in 2009, a decrease of 15,176 (9.8 percent) on the previous year. These job losses combined with the 0.9 percent employment decreases in 2008, results in employment among foreign-owned companies being 16.2 percent (26,977 jobs) lower than 2000 employment levels.

1.2 Trends in Part-time, Temporary and Short-term Contract Employment, 2000 - 2009



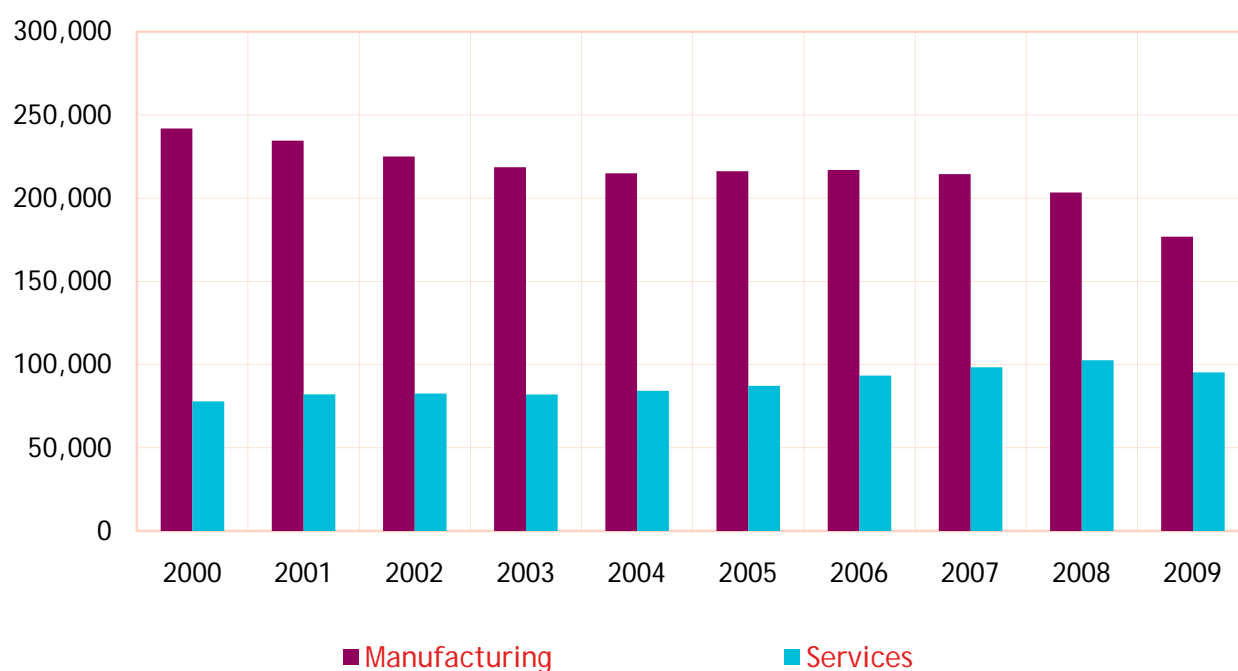
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Ownership	36,078	32,794	33,157	34,184	36,303	36,321	36,143	34,958	30,860	28,759
Irish	18,756	18,582	18,788	17,622	17,367	16,824	17,416	17,123	16,135	16,313
Foreign	17,322	14,212	14,369	16,562	18,936	19,497	18,727	17,835	14,725	12,446

In addition to permanent, full-time employment, there were a further 28,759 jobs of a temporary or part-time nature recorded in agency-assisted companies in 2009. This represents a decrease of 2,101 jobs (6.8 percent) on the previous year and a part-time employment decrease of 7,319 (20.3 percent) on the number engaged in 2000.

Among Irish-owned companies, there was an increase in temporary and part-time employment of 178 jobs (1.1 percent) in 2009. This represents the trend of companies employing people on a part-time basis rather than on full-time hours. The current part-time employment level of 16,313 is 2,443 (13 percent) lower than in 2000, when such employment amounted to 18,756.

Employment of a temporary or part-time nature among foreign-owned companies amounted to 12,446 in 2009, a decrease of 2,279 jobs (15.5 percent) on the previous year. This represents a decrease of 4,876 (28.1 percent) decrease over the period 2000 to 2009 and a fall of 36 percent from peak part-time employment, in 2005.

1.3 Trends in Permanent, Full-time Employment in Manufacturing and Services Sectors, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Sectors	319,704	316,630	307,539	300,572	299,099	303,381	310,299	312,825	306,041	272,053
Manufacturing	241,782	234,480	224,955	218,578	214,884	216,128	216,913	214,471	203,404	176,782
Services	77,922	82,150	82,584	81,994	84,215	87,253	93,386	98,354	102,637	95,271

Table 1.3 segments all permanent, full-time employment into manufacturing and services sectors.

Permanent full-time employment in manufacturing has fallen from a high of 241,782 in 2000 to its current level of 176,782 in 2009, a decrease of 65,000 jobs or 26.9 percent.

The services sector, on the other hand has grown over the period 2000 - 2009, with permanent, full-time employment reaching a high of 102,637 jobs in 2008, before falling to 95,271, in 2009. This represents an increase of 22.3 percent over the ten year period. Growth in the services sectors have helped to offset the employment losses seen in the manufacturing sector.

In 2009, employment in manufacturing decreased by 26,662 jobs (13.1 percent) from 2008's level, the services sector also had employment losses in 2009, losing 7,366 jobs or 7.2 percent in the year.

1.4 Sectoral Trends in Permanent, Full-time Employment in Irish and Foreign-owned Companies, 2000 - 2009

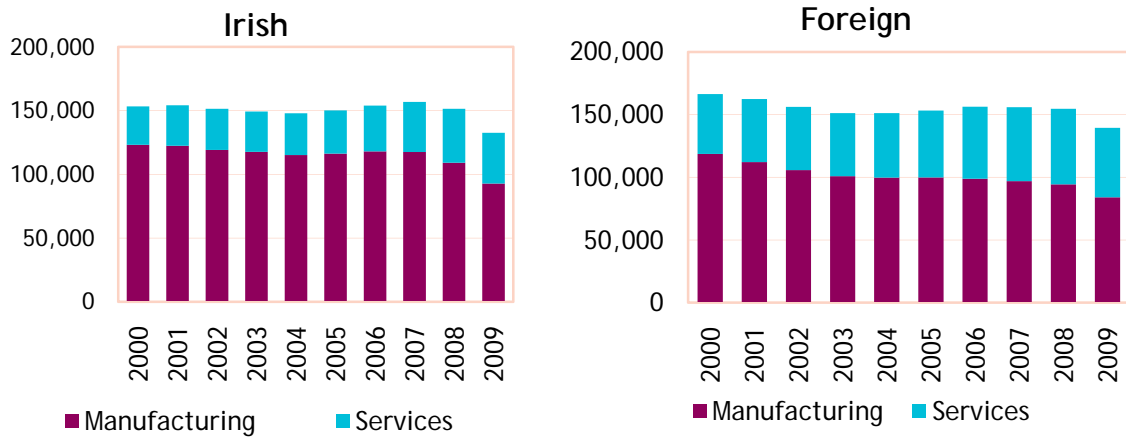


Figure 1.4 illustrates the employment in the manufacturing sector and the services sector in both Irish and foreign agency assisted companies. The majority of both Irish and foreign employment is accounted for by the manufacturing sector. It is notable that over the past decade the services sector has increased its share of total employment in both Irish and foreign companies, to now account for 36 percent of total agency employment.

1.5 Ownership Trends in Permanent, Full-time Employment in Manufacturing and Services Sectors, 2000 - 2009

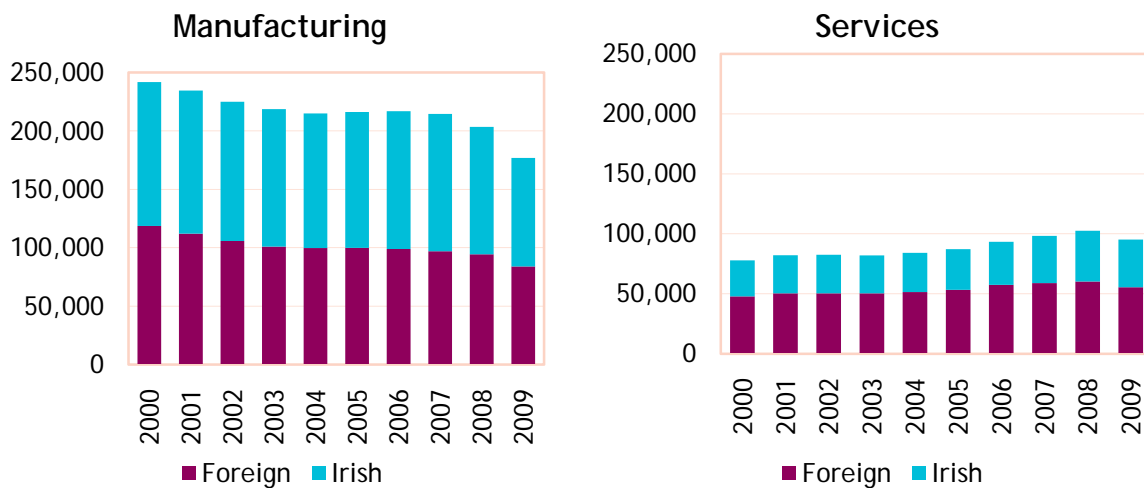
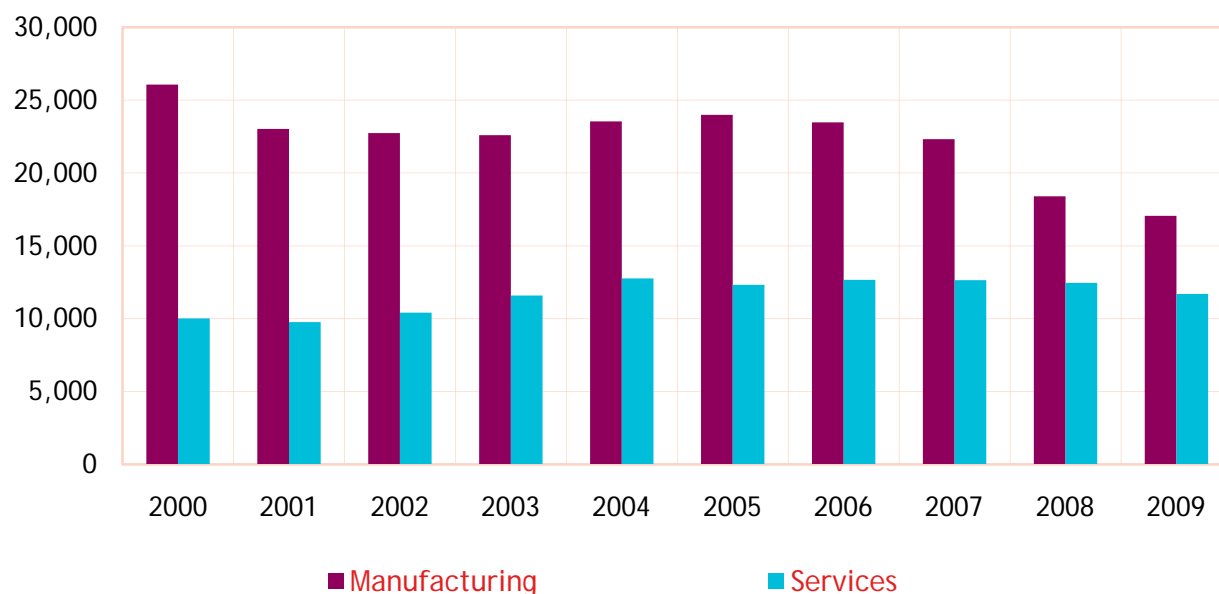


Figure 1.5 highlights how employment in Irish-owned companies compares to that of foreign-owned companies, in both the manufacturing and the services sectors.

In the manufacturing sector, indigenous industries have seen relatively small employment losses up to 2007, when compared to the foreign-owned companies, which have had continuously decreasing employment since 2000. In the services sector foreign-owned companies employ significantly more people than indigenous firms. Both foreign and Irish firms in this sector have seen similar rates of employment growth over the past decade.

1.6 Trends in Part-time, Temporary and Short-term Contract Employment in Manufacturing and Services Sectors, 2000 - 2009



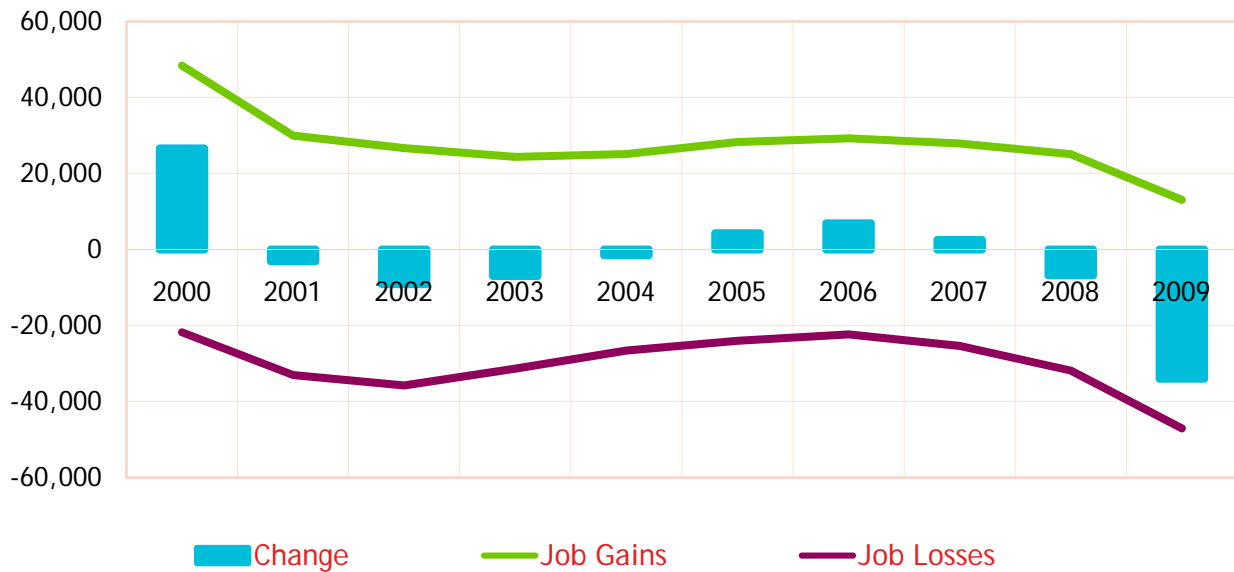
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Sectors	36,078	32,794	33,157	34,184	36,303	36,321	36,143	34,958	30,860	28,759
Manufacturing	26,062	23,029	22,740	22,597	23,542	23,992	23,479	22,317	18,400	17,059
Services	10,016	9,765	10,417	11,587	12,761	12,329	12,664	12,641	12,460	11,700

The above table and accompanying chart document trends in temporary and part-time employment on the basis of manufacturing and services.

Within the manufacturing sector, numbers employed in temporary and part-time employment have hovered around 22,000 to 23,000 from 2001 until 2007. In 2008, temporary employment fell to 18,400 and dropped a further 7.3 percent in 2009 to 17,059 jobs. This represents a decrease of 9,003 or 34.5 percent decrease over the period 2000 - 2009

Temporary and part-time employment within the services sectors have remained close to 12,000 jobs from 2003 to 2009. Over the 10 year period, illustrated above, services have increased their temporary, part time employment by 16.8 percent (1,684 jobs).

1.7 Job Gains, Losses & Net Change in Permanent, Full-time Employment in All Agency Assisted Companies, 2000 - 2009



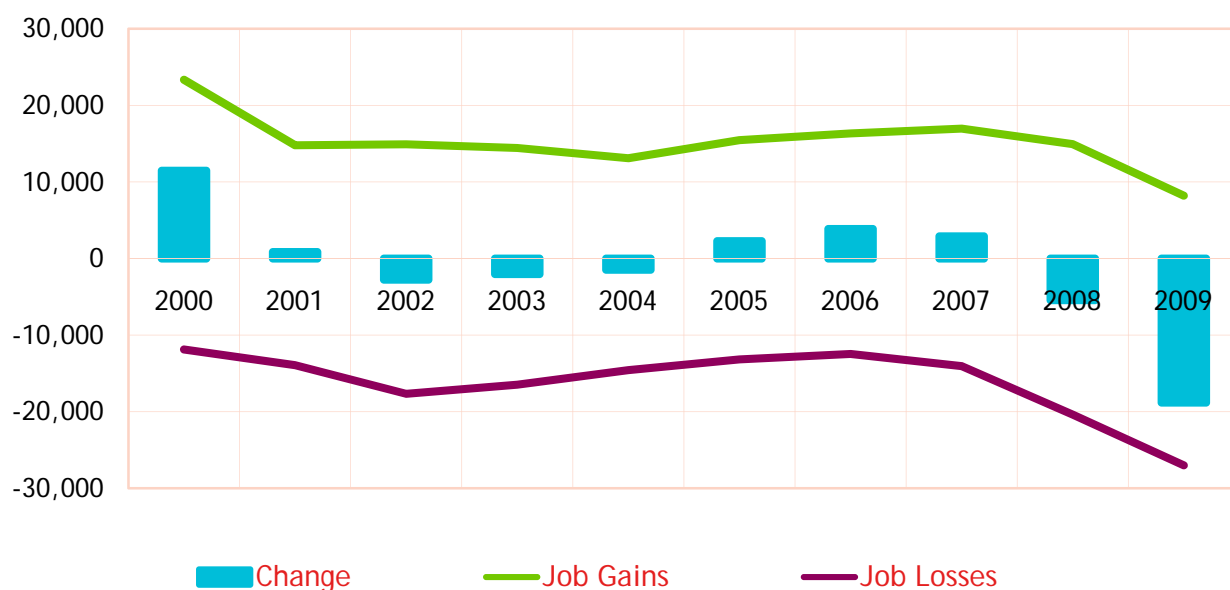
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Job Gains	48,367	29,957	26,667	24,356	25,118	28,274	29,223	27,882	25,061	13,059
Job Losses	-21,769	-33,031	-35,758	-31,323	-26,591	-23,992	-22,305	-25,356	-31,845	-47,047
Change	26,598	-3,074	-9,091	-6,967	-1,473	4,282	6,918	2,526	-6,784	-33,988

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

In the period 2001 - 2004, agency assisted companies recorded net job losses; this was followed by a period of net job creation in 2005 - 2007.

In 2009, the smallest number of job gains (13,059), were netted off against the largest number of job losses (47,047) in the ten year period, this has led to the largest number of net job losses (33,988) recorded. Of the 47,047 job losses, 83 percent of them were accounted for by companies who reduced staff numbers in 2009, but continue to trade.

1.8 Job Gains, Losses & Net Change in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009



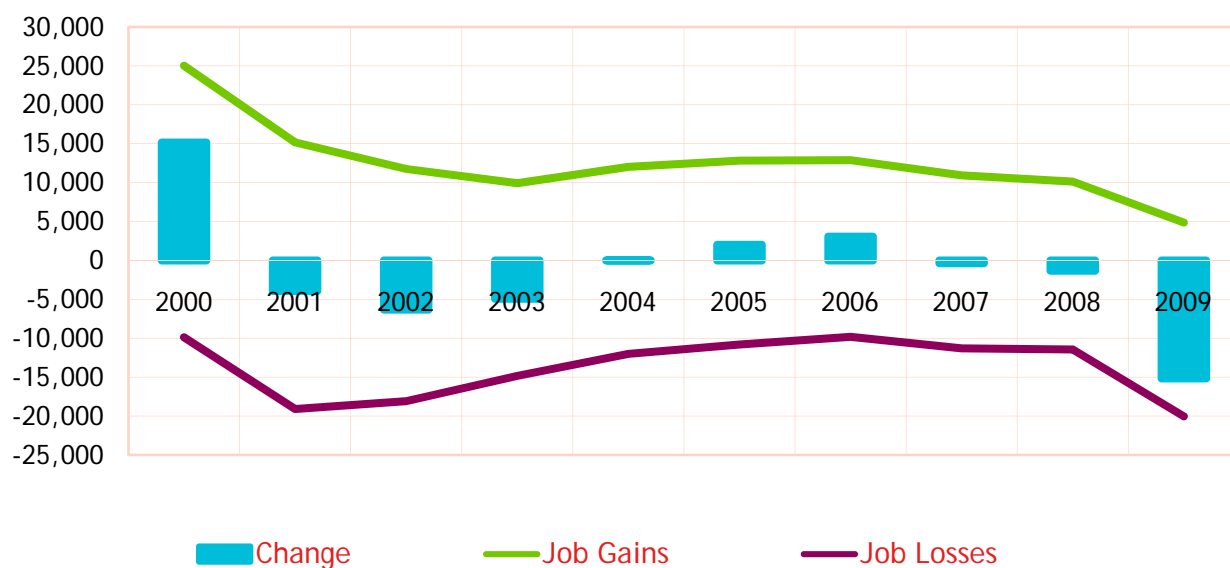
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Job Gains	23,341	14,785	14,909	14,433	13,098	15,458	16,338	16,953	14,937	8,196
Job Losses	-11,884	-13,933	-17,675	-16,475	-14,573	-13,189	-12,479	-14,060	-20,389	-27,008
Change	11,457	852	-2,766	-2,042	-1,475	2,269	3,859	2,893	-5,452	-18,812

Figure 1.8 illustrates trends in gross job gains, gross job losses and net job change among Irish-owned firms during the period 2000 - 2009.

Net job losses were recorded from 2002 - 2004, followed by net job gains in Irish-owned firms in the period 2005 - 2007.

In 2009, job losses of 27,008 were greater than gains of 8,196, leaving net job losses of 18,812 in Irish-owned companies.

1.9 Job Gains, Losses & Net Change in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Job Gains	25,026	15,172	11,758	9,923	12,020	12,816	12,885	10,929	10,124	4,863
Job Losses	-9,885	-19,098	-18,083	-14,848	-12,018	-10,803	-9,826	-11,296	-11,456	-20,039
Change	15,141	-3,926	-6,325	-4,925	2	2,013	3,059	-367	-1,332	-15,176

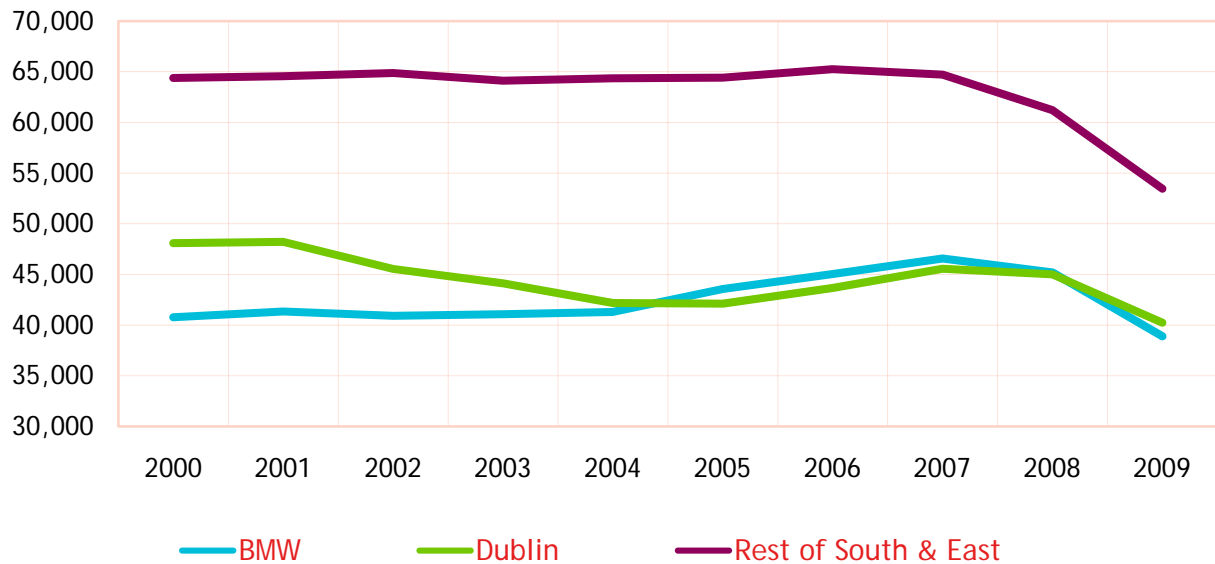
Figure 1.9 provides an overview of gross job gains, job losses and net job change in foreign-owned agency-assisted companies between 2000 and 2009.

The period 2001 - 2003 net job losses were recorded, while 2004 - 2006 was a period of employment growth, characterised by positive year on year net increases in employment across foreign-owned companies. However, this has moved to negative territory in the past three years.

In 2008, net job losses amounted to 1,332 while in 2009 job gains of 4,863 were outweighed by losses of 20,039 to give a net loss for the year of 15,176 jobs.

2. Regional Employment Trends in Agency Assisted Companies, 2000 - 2009

2.1 Region Trends in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Regions	153,270	154,122	151,356	149,314	147,839	150,108	153,967	156,860	151,408	132,596
BMW	40,782	41,344	40,924	41,067	41,303	43,561	45,047	46,576	45,194	38,893
Dublin	48,093	48,216	45,552	44,126	42,179	42,122	43,663	45,565	45,005	40,240
South & East	64,395	64,562	64,880	64,121	64,357	64,425	65,257	64,719	61,209	53,463

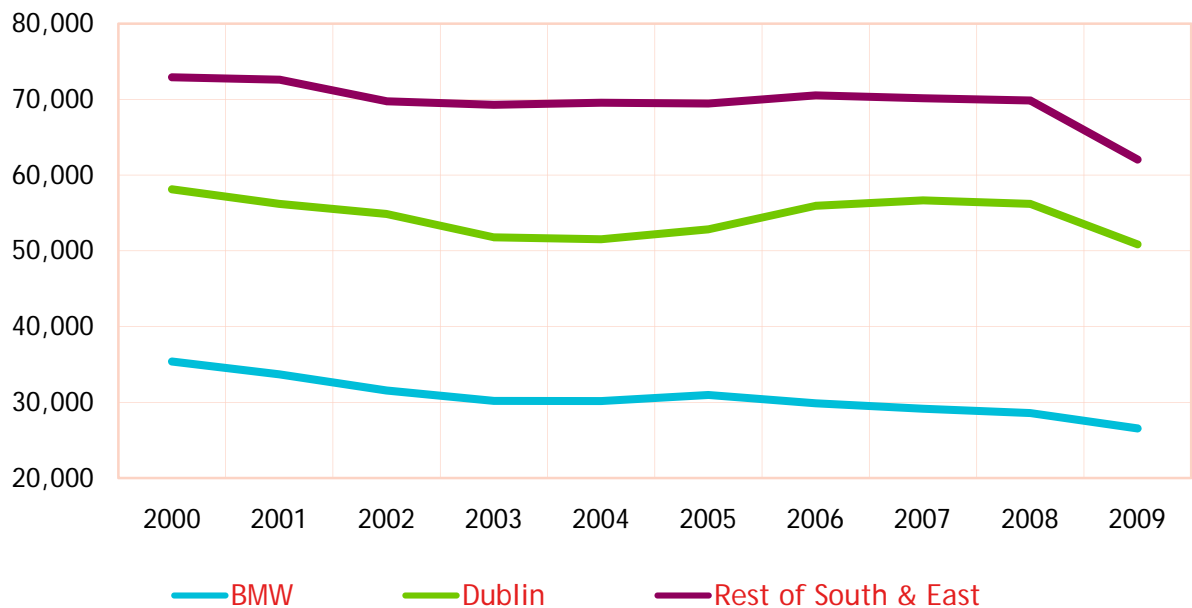
Figure 2.1 illustrates trends in permanent, full-time employment in Irish-owned agency assisted companies. The South & East (S&E) region saw greatest job losses in 2009, with a reduction of 7,746 jobs. The Border, Midlands and West (BMW) region saw the greatest proportional losses in 2009 with job losses 13.9 percent. Within the BMW region, the Midlands suffered job losses of 19.6 percent.

In 2000, the BMW region accounted for 26 percent of Irish-owned employment, employing 40,782 full-time people. Employment in the region has decreased by 4.6 percent over the 10 years to 2009. The BMW region now accounts for 29 percent of agency assisted indigenous employment.

Employment in the S&E region has decreased from 64,395 jobs in 2000 by 17 percent to account for 53,463 permanent jobs or 40 percent of indigenous employment in 2009. The Dublin region has decrease by 4,765 jobs (10.6 percent) in 2009 and has decrease by 7,853 jobs since 2000 (16 percent). The Dublin region currently accounts for 30.3 percent of Irish-owned employment.

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

2.2 Regional Trends in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Regions	166,434	162,508	156,183	151,258	151,260	153,273	156,332	155,965	154,633	139,457
BMW	35,381	33,695	31,558	30,173	30,165	30,959	29,857	29,141	28,574	26,544
Dublin	58,120	56,200	54,864	51,789	51,521	52,849	55,942	56,668	56,191	50,855
South & East	72,933	72,613	69,761	69,296	69,574	69,465	70,533	70,156	69,868	62,058

Trends in permanent, full-time employment in foreign-owned agency assisted companies are detailed above in figure 2.2. Dublin has witnessed its share of foreign-owned employment grow from 34.9 percent in 2000 to 36.5 percent in 2009. This equates to a decrease in employment of 7,265 jobs (12.5 percent) over the 10 years.

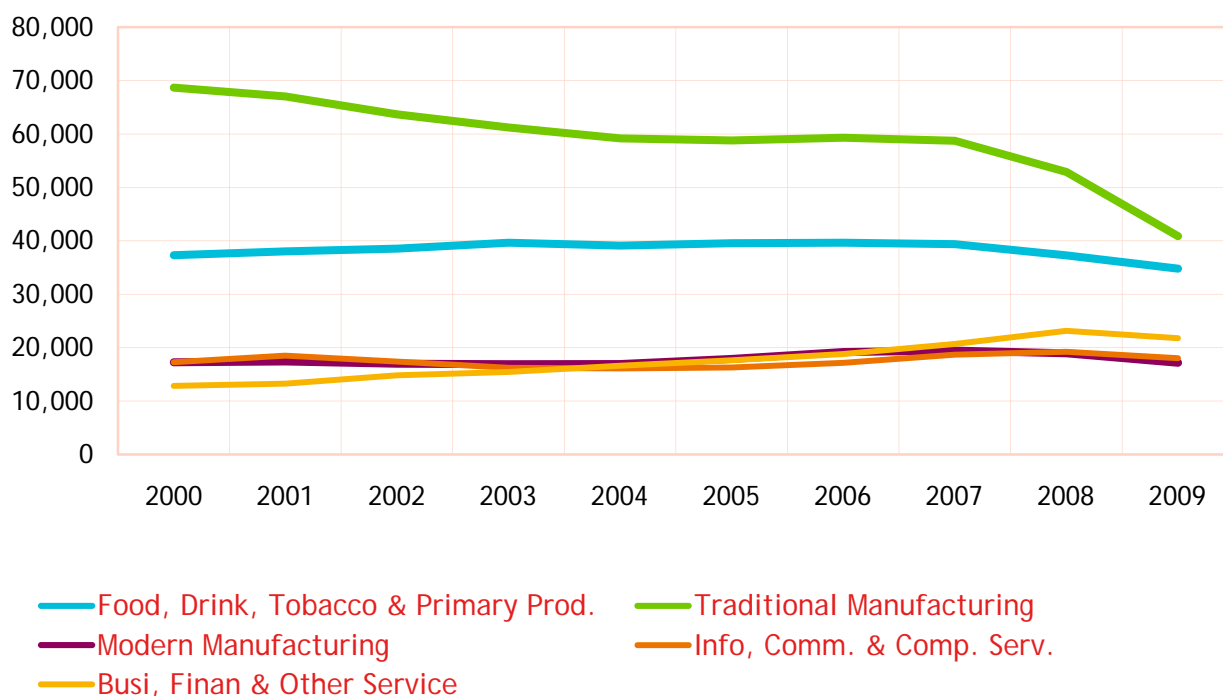
The BMW region suffered the largest proportional job losses over the period, with recorded losses of 25 percent (8,837 jobs) while the S&E had the greatest number of job losses, with a reduction of 10,875 jobs (14.9 percent) from 2000 to 2009.

In 2009, the S&E region saw the greatest number and greatest proportional job losses in foreign-owned employment, with a reduction of 11.2 percent or 7,810 jobs. Within this, the Mid-West region had a reduction of 19.3 percent in 2009.

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

3. Sectoral Employment Trends in Agency Assisted Companies, 2000 - 2009

3.1 Sectoral Trends in Permanent, Full-time Employment in Irish-owned Companies, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Sectors	153,270	154,122	151,356	149,314	147,839	150,108	153,967	156,860	151,408	132,596
Food, Drink, Tob & Primary Prod	37,284	37,997	38,518	39,608	39,081	39,537	39,617	39,359	37,270	34,790
Traditional Manufacturing	68,662	67,015	63,662	61,194	59,165	58,788	59,270	58,720	52,869	40,853
Modern Manufacturing	17,242	17,392	16,976	16,883	16,908	17,878	19,169	19,430	18,907	17,149
Info, Comm & Comp Services	17,266	18,485	17,391	16,210	16,094	16,288	17,132	18,669	19,214	18,026
Business, Fin & Other Services	12,816	13,233	14,809	15,419	16,591	17,617	18,779	20,682	23,148	21,778

Figure 3.1 presents a sectoral breakdown of permanent, full-time employment in Irish-owned manufacturing and services sectors.

The food, drink, tobacco and primary production sector has shown great consistency in this time series, with approximately the same numbers employed in 2008 (37,270) as in 2000 (37,284). However, in 2009 this sector decreased by 6.7 percent (2,480 jobs) now accounting for 26.2 percent of total Irish-owned employment, an increase from 2000's level of 24.3 percent.

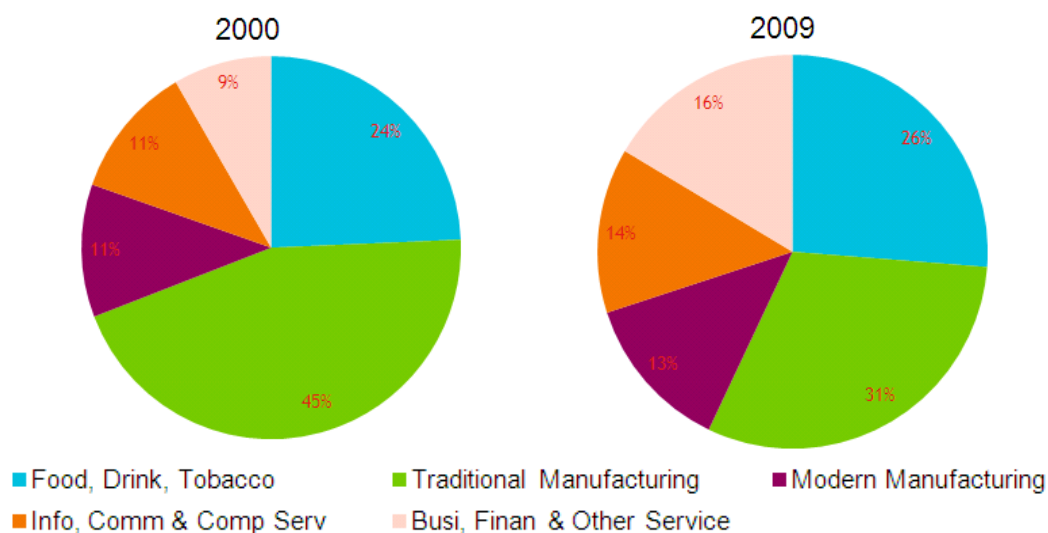
A decline in traditional manufacturing employment is apparent in this graph with a loss of 27,809 jobs (40.5 percent) since 2000. The sectors included in traditional manufacturing are textiles, clothing footwear and leather, wood and wood products, paper and printing, rubber and plastics, non-metallic minerals, basic and fabricated metal products, machinery & equipment, transport equipment and miscellaneous manufacturing (excluding medical devices).

Over the same period the numbers employed within modern manufacturing have remained around 17,000. Here the sectors included are computer, electronic and optical, electrical equipment, chemicals, energy, water & waste and medical devices.

There has been steady growth in the numbers employed in the services sectors in the last ten years. Employment in the information, communications and computer services has risen by 1,948 between 2000 and 2008 before dropping by 1,188 in 2009. The business, financial and other services sectors have also grown with an additional 10,332 people employed in these sectors since 2000 (12,816) and 2008 (23,148 jobs). In 2009 this sector saw employment losses of 1,370 or 5.9 percent.

A more detailed sectoral breakdown of employment in Irish-owned manufacturing and services is presented in Appendix A.

3.2 Sectoral Proportions of Permanent, Full-time Employment in Irish-owned Companies, 2000 and 2009



Food, drink, tobacco and primary production, modern manufacturing, information, communication & computer services and business, financial & other services sectors have all increased their share of Irish-owned employment in the period 2000 to 2009. Traditional manufacturing has decreased its share from 44.8 percent in 2000 to 30.8 percent in 2009.

3.3 Sectoral Analysis of Permanent, Full-time Employment in Irish-owned Companies, 2009

	Full Time Jobs '09	Full Time Gains '09	Full Time Losses '09	Full Time Change '09	Full Time % Change
Total - Irish	132,596	8,196	27,008	-18,812	-12.4%
Manufacturing & Other Industry	92,792	4,354	20,608	-16,254	-14.9%
Agriculture, Fishing, Forestry, Mining & Quarrying	2,330	155	563	-408	-14.9%
Food, Drink & Tobacco	32,460	1,494	3,566	-2,072	-6.0%
Textiles, Clothing, Footwear & Leather	2,654	125	608	-483	-15.4%
Wood & Wood Products	3,784	69	1,255	-1,186	-23.9%
Paper & Printing	4,757	108	909	-801	-14.4%
Chemicals	3,084	106	422	-316	-9.3%
Rubber & Plastics	4,003	152	895	-743	-15.7%
Non-Metallic Minerals	5,263	207	3,385	-3,178	-37.6%
Basic & Fabricated Metal Products	8,928	361	3,121	-2,760	-23.6%
Computer, Electronic & Optical Equipment	5,169	412	580	-168	-3.1%
Electrical equipment	2,469	175	476	-301	-10.9%
Machinery & Equipment	5,648	282	1,475	-1,193	-17.4%
Transport Equipment	1,177	16	405	-389	-24.8%
Other Misc. Manu & Medical Devices	5,038	224	1,509	-1,285	-20.3%
Energy, Water, Waste & Construction	6,028	468	1,439	-971	-13.9%
Information, Communications & Other Services	39,804	3,842	6,400	-2,558	-6.0%
Publishing, Broadcasting & Telecommunications	4,212	320	488	-168	-3.8%
Computer Prog., Consultancy & Related Activities	11,844	1,038	2,249	-1,211	-9.3%
Other IT & Computer Services	1,970	380	189	191	10.7%
Financial Services	4,632	352	340	12	0.3%
Business Services	10,123	997	2,002	-1,005	-9.0%
Education & Other Services	7,023	755	1,132	-377	-5.1%

Figure 3.3 provides a detailed sectoral analysis of permanent, full-time employment for 2009 along with job gains and losses. It also provides net percentage change in employment between 2008 and 2009.

From the table we can see that the majority (70 percent) of Irish-owned employment is in the manufacturing sector. This sector has seen the loss of 20,608 jobs in 2009, with job gains accounting for 4,354, a net loss of 16,254 jobs (14.9 percent). Five sectors account for the bulk of these job losses.

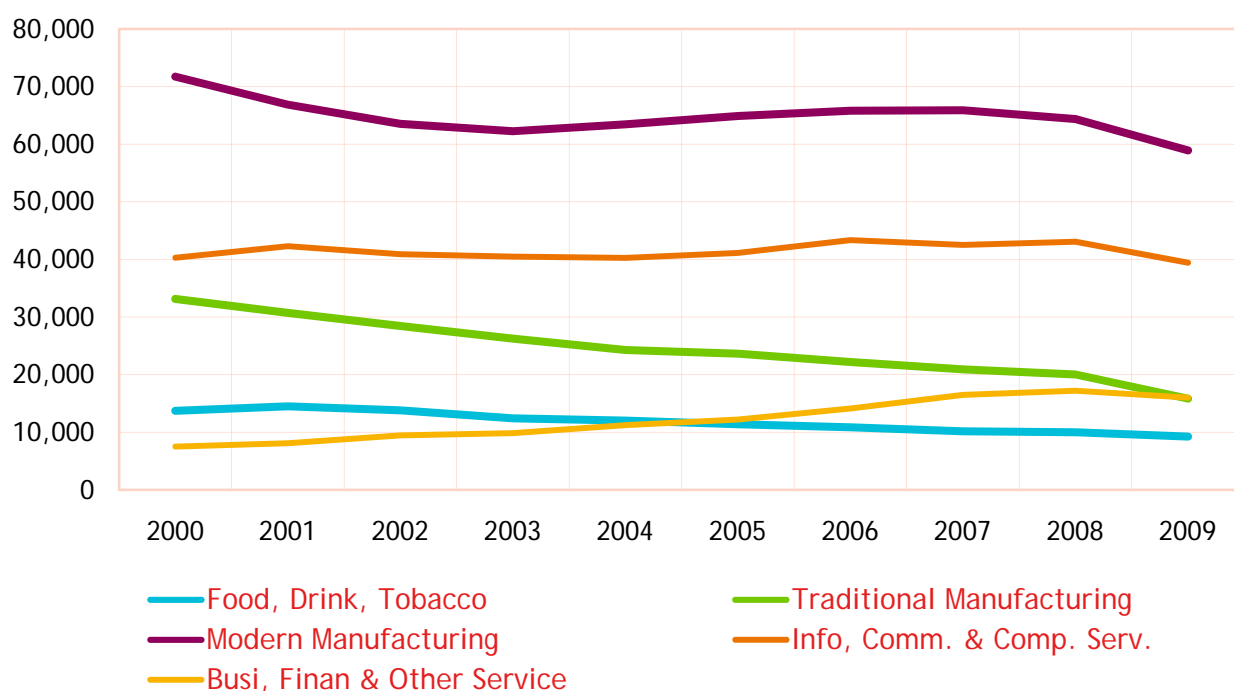
Construction related sectors such as basic and fabricated metal products, wood and wood products, non-metallic minerals and machinery & equipment accounted for 51 percent of Irish owned manufacturing job losses, with 8,317 jobs lost between them in 2009.

The food sector also suffered major losses, the sector recorded gains of 1,494 jobs against losses of 3,566 leaving a net loss of 2,072 jobs or 6 percent. This loss accounts for 11 percent of total Irish-owned net employment losses for the year.

The services sectors account for 30 percent of Irish agency assisted employment. This sector created 3,842 jobs in 2009 as opposed to losses of 6,400, recording net job losses of 2,558 (6 percent). In this sector the major losses were seen in business services and computer programming, consultancy & related activities, with decreased employment of 9 percent (1,005 jobs) and 9.3 percent (1,211 jobs) respectively, in 2009.

Financial services and other IT and computer services saw minor employment gains in 2009, with increases of 0.3 percent and 10.7 percent respectively.

3.4 Sectoral Trends in Permanent, Full-time Employment in Foreign-owned Companies, 2000 - 2009



	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
All Sectors	166,434	162,508	156,183	151,258	151,260	153,273	156,332	155,965	154,633	139,457
Food, Drink, Tob & Primary Prod	13,744	14,517	13,831	12,414	12,033	11,400	10,874	10,164	10,002	9,251
Traditional Manufacturing	33,134	30,710	28,447	26,252	24,267	23,651	22,201	20,926	20,018	15,840
Modern Manufacturing	71,716	66,849	63,521	62,227	63,430	64,874	65,782	65,872	64,338	58,899
Info, Comm & Comp Services	40,307	42,308	40,920	40,501	40,280	41,130	43,358	42,528	43,068	39,440
Business, Fin & Other Services	7,533	8,124	9,464	9,864	11,250	12,218	14,117	16,475	17,207	16,027

Figure 3.4 and the accompanying table present a sectoral analysis of employment in foreign-owned manufacturing and services companies.

Modern and traditional manufacturing have seen the greatest amount of job losses in foreign-owned employment in the period 2000 to 2009. Modern manufacturing has decreased employment by 12,817 jobs (17.9 percent) in the 10 years, 5,439 of these losses occurred in 2009. This sector remains the largest foreign-owned employer. The sub-sectors included under this heading are computer, electronic & optical equipment, chemicals, electrical equipment and medical devices.

Traditional manufacturing has declined most significantly during this period; the sector now employs 17,294 less employees than it did ten years ago, a decrease of 52.2 percent. The sub-sectors included textiles, clothing footwear and leather, wood and wood products, paper and printing, rubber and plastics, non-metallic minerals, basic and fabricated metal products, machinery & equipment, transport equipment and miscellaneous manufacturing (excluding medical devices).

The food, drink, tobacco and primary production sector has seen job losses of 4,493 from 2000 employment level a reduction of 32.7 percent, 751 of these job losses were recorded in 2009.

The services sectors have seen more buoyant employment numbers over the period 2000 to 2009. In the business, financial and other services sector numbers employed rose from 7,533 in 2000 to 16,027 in 2009, an increase of 112 percent. Losses were recorded in information, communications & computer services, with 867 net jobs being lost (2.2 percent) since 2000.

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

3.5 Sectoral Proportions of Permanent, Full-time Employment in Foreign-owned Companies, 2000 and 2009

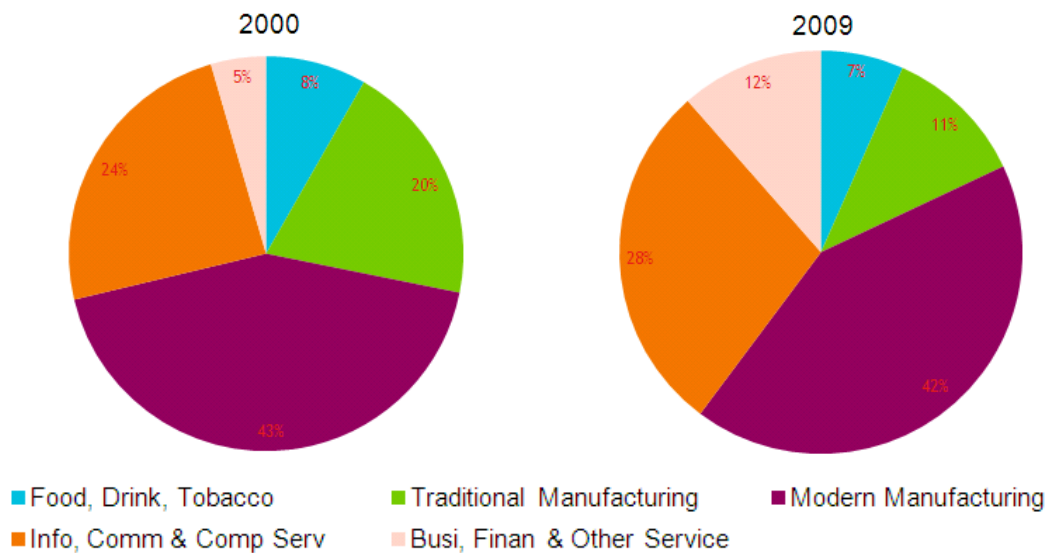


Figure 3.5 depicts the proportion of agency assisted employment each sector in the economy accounts for in 2000 and in 2009. Most notable is the reduced share of traditional manufacturing and the increase in the services sectors. Business, financial and other services have increased their proportion of employment from 5 to 12 percent.

3.6 Sectoral Analysis of Permanent, Full-time Employment in Foreign-owned Companies, 2009

	Full Time Jobs '09	Full Time Gains '09	Full Time Losses '09	Full Time Change '09	Full Time % Change
Total - Foreign	139,457	4,863	20,039	-15,176	-9.8%
Manufacturing & Other Industry	83,990	2,436	12,804	-10,368	-11.0%
Food, Drink, Tobacco & Primary Prod.	9,251	201	952	-751	-7.5%
Textiles, Clothing, Footwear & Leather	248	0	331	-331	-57.2%
Wood & Wood Products	640	0	93	-93	-12.7%
Paper & Printing	989	4	188	-184	-15.7%
Chemicals	19,905	407	1,738	-1,331	-6.3%
Rubber & Plastics	2,490	16	430	-414	-14.3%
Non-Metallic Minerals	1,168	9	397	-388	-24.9%
Basic & Fabricated Metal Products	1,905	81	432	-351	-15.6%
Computer, Electronic & Optical Equipment	16,510	351	3,837	-3,486	-17.4%
Electrical equipment	2,732	101	1,088	-987	-26.5%
Machinery & Equipment	3,863	15	793	-778	-16.8%
Transport Equipment	2,708	12	1,578	-1,566	-36.6%
Other Misc. Manu & Medical Devices	21,581	1,239	947	292	1.4%
Information, Communications & Other Services	55,467	2,427	7,235	-4,808	-8.0%
Publishing, Broadcasting & Telecommunications	268	2	11	-9	-3.2%
Computer Prog., Consultancy & Related Activities	36,373	1,502	4,841	-3,339	-8.4%
Other IT & Computer Services	2,799	281	561	-280	-9.1%
Financial Services	15,317	629	1,613	-984	-6.0%
Business Services	347	1	163	-162	-31.8%
Education & Other Services	363	12	46	-34	-8.6%

Figure 3.6 explores the detailed sectoral composition of permanent full-time jobs, job gains and losses and net employment change in foreign-owned agency assisted companies in 2009.

Within manufacturing, the computer, electronic & optical equipment sector experienced the largest net loss of 3,486 jobs, a reduction of 17.4 percent on 2008 employment. The manufacturing sector with the largest number of employees, the chemicals sector, saw net loss of 1,331 jobs in 2009. Miscellaneous manufacturing and medical devices was the only sub-sector to record net job increases in 2009, with 1,239 jobs created, 947 job losses giving a net increase of 1.4 percent or 292 jobs.

Within the services sector, the largest foreign-owned sector, the computer programming & consultancy sector, recorded a net loss of 3,339 jobs (8.4 percent). Business services showed the largest job losses rate of 31.8 percent (162 jobs). Financial service saw net losses of 984 jobs or 6 percent.