

## PREFACE

This document sets out the final results of the 1999 annual employment survey<sup>1</sup>. The survey is an annual census of employment in all known active manufacturing and internationally traded and international financial service companies and 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 through its Enterprise & Trade Policy Division with the co-operation of Enterprise Ireland and IDA Ireland regional staff. Shannon Development carry out the survey for companies falling within its remit (Irish-owned companies in the Mid-West region and foreign-owned companies in the Shannon Zone), and provide the results for incorporation into the Forfás database.

The survey is an annual census of employment in all known active manufacturing and internationally traded and financial services and other service companies supported by the Agencies, and has been carried out each year since 1973. Forfás in line with its mandate to co-ordinate the activities of Enterprise Ireland, Shannon Development and IDA Ireland, continues to carry out the survey through its Enterprise & Trade Policy Division with the co-operation of Enterprise Ireland and IDA Ireland regional staff. Shannon Development carry out the survey for companies falling within its remit (Irish-owned companies in the Mid-West region and foreign-owned companies in the Shannon Zone), and provide the results for incorporation into the Forfás database.

The survey results are outlined in the Executive Summary of this document. The overall employment trends presented in **Section 1** include the manufacturing and internationally traded/financial services and other service employment of Enterprise Ireland, IDA Ireland, Shannon Development and Údarás na Gaeltachta<sup>2</sup> and covers the period 1990-1999. Historic employment figures differ from those previously reported due to factors such as the inclusion of new companies, transfer of ownership and/or transfers within agencies.

Data on part-time, temporary and short-term contract employment is also provided for companies within the remit of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta. Shannon Development does not collect data on "non-permanent" forms of employment at present.

**Section 2** provides comparative international employment trend data.

**Section 3** provides a regional analysis of permanent full-time employment and part-time, temporary and short-term contract employment.

**Section 4** analyses sectoral trend data for permanent full-time and part-time, temporary and short-term contract employment.

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<sup>1</sup> An overview of the survey, together with the methodology and definitions used for each employee category is provided in Appendix 3

<sup>2</sup> Údarás na Gaeltachta provided its employment data to the Forfás Business Information System and the information contained in this section for Údarás is sourced from the BIS

## KEY NATIONAL EMPLOYMENT TREND

Permanent full-time employment in manufacturing, internationally traded and financial services and other activities supported by the development agencies rose to 290,600 in 1999, the highest level recorded.

The number of permanent full-time jobs created in 1999 amounted to 34,609, which represents an increase of 7.6% on the levels achieved in 1998 and is the highest to date. However, the level of permanent full-time jobs lost also rose to an all time high of 21,618 in 1999, an increase of 22.2% on the losses sustained in 1998. This reduced the number of net jobs created in 1999 to 12,991 which is below the levels achieved in 1998 (14,485) and 1997 (15,851).

The key driver of employment growth was internationally traded/financial services activities which accounted for 9,518 (73.3%) of the total increase of 12,991 in permanent full-time employment in 1999. Permanent full-time employment in manufacturing accounted for 3,480 net jobs, or 26.8% of the total increase in permanent full-time employment recorded in 1999.

Foreign-owned companies accounted for 8,713 (67.1%) of net employment growth with Irish-owned firms contributing the balance of 4,278 (32.9%) net jobs in 1999. Employment grew by 6.3% in foreign-owned firms in 1999, and by 3.1% in Irish-owned companies. This represents a slowdown in the rates of growth achieved by both Irish and foreign-owned firms in recent years.

On a sectoral basis, two sectors, internationally traded services and metals & engineering (which includes electronics) accounted for 90% of the net change in permanent full-time employment of 12,991 in 1999. Another sector to perform exceptionally well was international financial services (IFSC approved companies) which recorded a positive net change in permanent full-time employment of 1,831 (+37.7%) in 1999.

On a regional basis, each region, with the exception of the Border and Midlands regions recorded a positive net change in permanent full-time employment in 1999. However, the Dublin region fared best, given that it accounted for 31.5% of permanent full-time employment in 1999, but accounted for 63.6% of all net new jobs created in that year. The share of new jobs created in the Border Midlands West (BMW) regions declined in 1998 and 1999, while it increased in the Southern and Eastern regions in these years. It is an aim of industrial policy to achieve a greater regional dispersal in new jobs created. Accordingly, the regional distribution of agency supported new jobs will be monitored closely in the future.

Permanent full-time employment in manufacturing rose by 18% since 1990, compared with significant falls in a number of other leading industrialised nations. This points to the success of Ireland's policy of developing the manufacturing industry base which is increasingly focussed on high technology sectors.

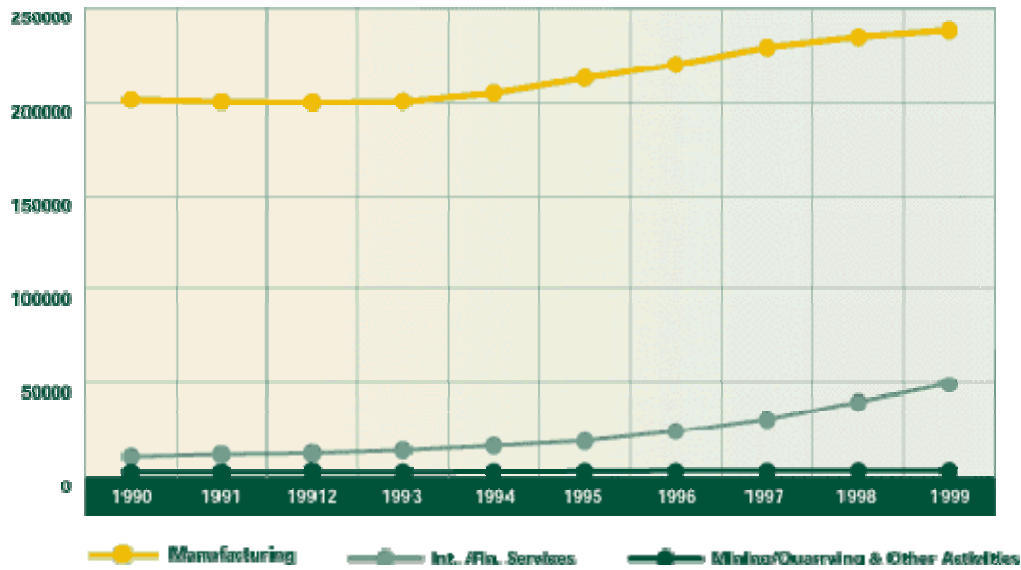
The share of total employment accounted for by part-time, temporary and short-term contract employment in IDA Ireland, Enterprise Ireland and Údarás na Gaeltachta client companies has also increased steadily during the 1990's, rising from 6.7% of all jobs in 1990 to 11.0% in 1999. This form of employment increased at a faster rate in Irish-owned companies in 1999, rising by 8.1%, compared with a rise of 0.9% in foreign-owned firms.

## NATIONAL EMPLOYMENT TRENDS 1990-1999

(Includes companies under the remit of Enterprise Ireland, IDA Ireland, Shannon Development and Údarás na Gaeltachta)

**Trends in Permanent Full-Time Manufacturing Employment 1990-1999 (Overall/Irish and Foreign-Owned Components, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta)**

**Chart 1**

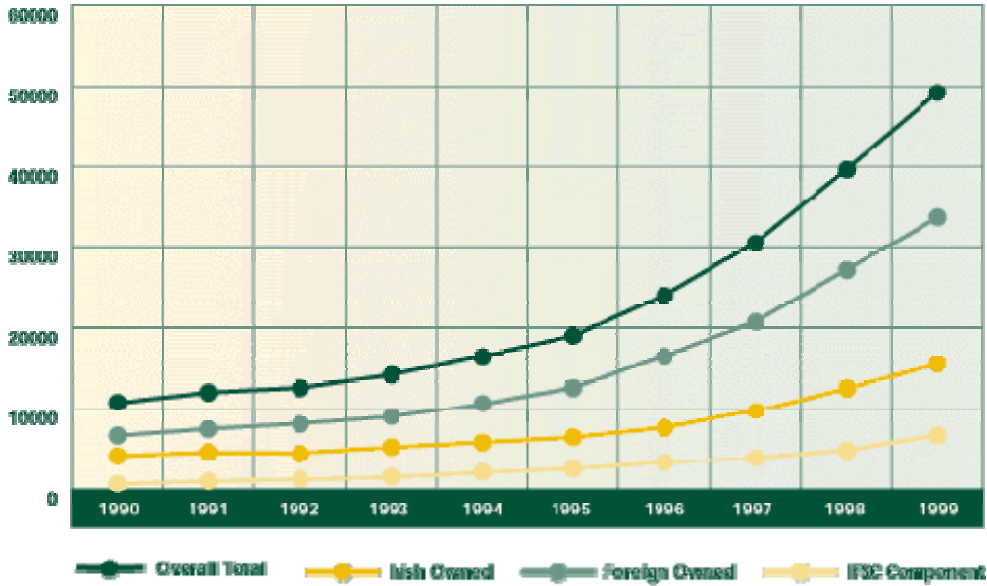


	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<b>Overall Total</b>	201,412	200,189	199,681	200,249	204,811	212,598	219,724	228,950	234,269	237,749
<b>Irish Owned</b>	112,839	111,097	110,764	109,697	110,889	113,529	116,965	120,617	123,201	124,371
<b>Foreign-Owned</b>	88,573	89,092	88,917	90,552	93,922	99,069	102,759	108,333	111,068	113,378

- Permanent full-time employment in Irish-owned manufacturing companies increased by 11,532 (10.2%) in the ten-year period 1990-1999. The increase in 1999 was just under 1.0%. Employment in Irish-owned client companies represented 52.3% of total permanent full time employment in manufacturing in 1999, compared to 56.0% in 1990.
- Employment in foreign-owned manufacturing companies has displayed consistent growth since 1990 to reach a level of 113,378 in 1999. Over the past ten years, employment in foreign-owned manufacturing companies has increased by 24,805 (28.0%) and in 1999 represented 47.7% of permanent full-time employment in manufacturing compared with 44.0% in 1990. The increase in permanent employment in foreign-owned firms in 1999 was 2.1%

**Trends in Permanent Full-Time Internationally Traded and Financial Services Employment 1990-1999, Overall/Irish and Foreign-Owned Components, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta**

**Chart 7**

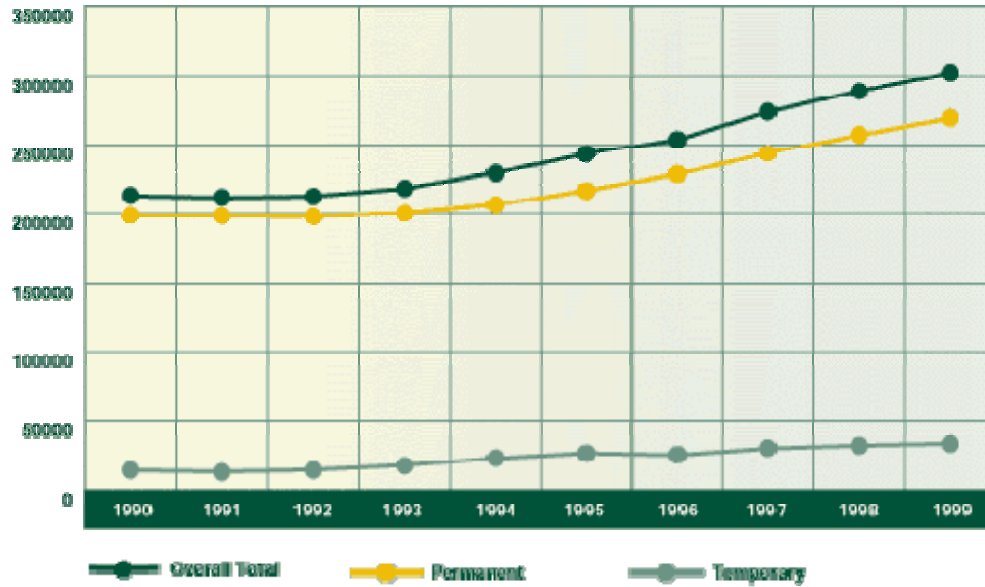


	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<b>Overall Total</b>	10,788	12,044	12,606	14,184	16,455	19,038	24,078	30,560	39,688	49,206
Irish Owned	4,158	4,592	4,510	5,219	5,807	6,435	7,598	9,771	12,505	15,499
Foreign-Owned	6,630	7,452	8,096	8,965	10,648	12,603	16,480	20,789	27,183	33,707
IFSC Component	731	1,067	1,268	1,546	2,118	2,586	3,319	3,925	4,853	6,684

- Permanent full-time employment in Irish-owned internationally traded and financial services companies increased by 11,341 (272.8%) from 4,158 in 1990 to 15,499 in 1999. In 1999, the increase was 2,994 (23.9%).
- Permanent full-time employment in foreign-owned internationally traded and financial services companies increased by 27,077 (408.4%) over the ten-year period. In 1999, the increase was 6,524 (24.0%).
- Permanent full-time employment in international financial services (IFSC approved companies) increased to 6,684 in 1999 and accounted for 13.6% of the internationally traded/financial services total, representing a doubling of its share of this sector's employment since 1990 (6.8%). The international financial services increase in 1999 was 1,831 (37.7%).

**Total Employment Trends in Permanent Full-Time and Part-Time, Temporary and Short-Term Contract Employment<sup>9</sup> 1990-1999, Manufacturing, Internationally Traded and Financial Services and Other Activities, IDA Ireland, Enterprise Ireland and Údarás na Gaeltachta**

**Chart 7**

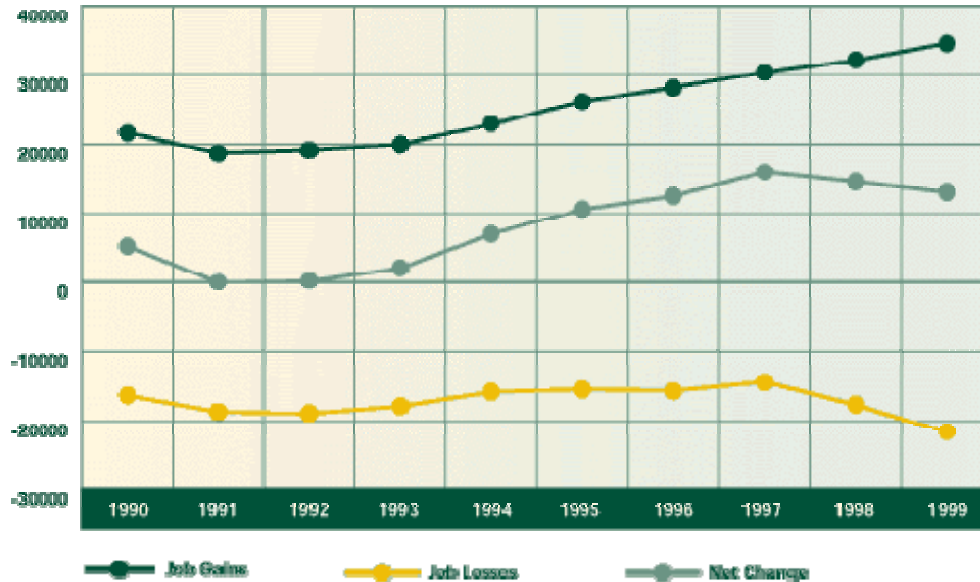


	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<b>Overall Total</b>	213,195	211,673	212,786	218,136	229,608	243,256	253,700	273,573	288,899	302,307
Permanent	198,850	198,336	198,132	200,329	206,727	216,738	228,561	243,753	257,005	269,063
Part-Time/Temporary										
Short-Term	14,345	13,337	14,654	17,807	22,881	26,518	25,139	29,820	31,894	33,244

- The share of total employment accounted for by part-time, temporary and short-term contract employment (excluding Shannon Development) has increased steadily during the 1990's (from 6.7% of all jobs in 1990 to 11.0% in 1999).
- 9 Excludes Shannon Development

**Trends in Permanent Full-time Employment 1990-1999, Manufacturing, Internationally Traded and Financial Services and Other Activities, Job Gains/Job Losses/Net Change/, IDA Ireland, Enterprise Ireland, Shannon Development, Údarás Na Gaeltachta**

**Chart 8**

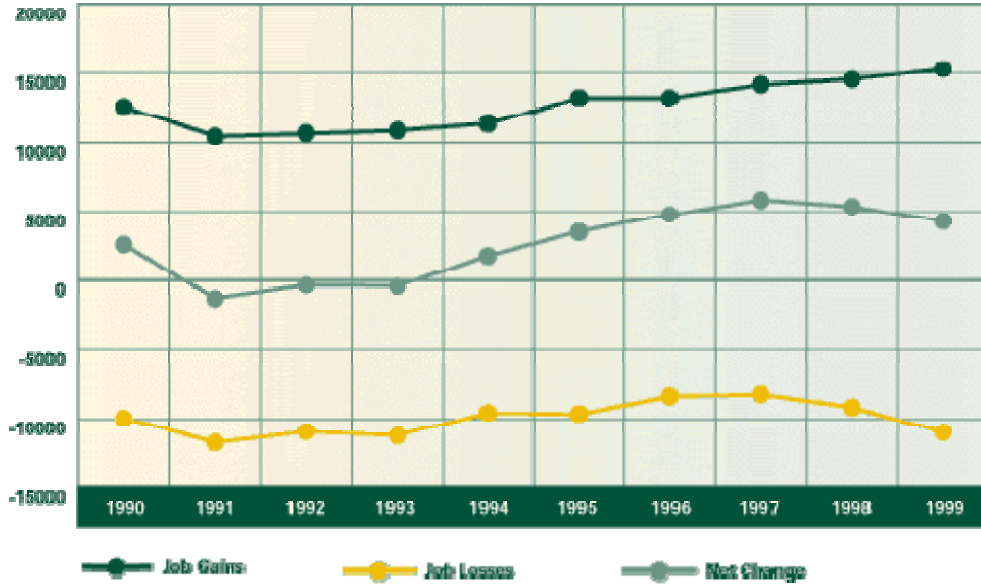


	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Job Gains	21,608	18,711	19,117	19,973	22,827	26,163	28,169	30,340	32,179	34,609
Job Losses	-16,395	-18,693	-18,930	-17,892	-15,878	-15,520	-15,712	-14,489	-17,694	-21,618
Net Change	5,213	18	187	2,081	6,949	10,643	12,457	15,851	14,485	12,991

- In 1999, the level of total gross job gains in manufacturing, internationally traded/financial services and other activities supported by the agencies reached the highest level recorded to date at 34,609. An increase of 2,430 (7.6%) was recorded in 1999. Over the ten-year period 1990-1999 the level of job gains increased by 13,001 (60.2%).
- The level of job losses increased by 31.9% over the ten-year period 1990-1999 to reach 21,618 in 1999. This represents an increase of 22.2% on the level of job losses recorded in 1998 and is the highest increase recorded over the ten-year period.
- Overall net change declined from 5,213 in 1990 to a low of 18 in 1991 before improving slightly to 187 jobs in 1992. Since 1992, net change in employment has improved dramatically to reach a level of 15,851 in 1997, the highest recorded over the period. A decline of 18% occurred in the following two years 1998/99 to a level of 12,991 jobs, however, due to the high level of job losses (+ 49%) incurred in this period.

**Trends in Permanent Full-Time Employment in Irish-Owned Manufacturing, Internationally Traded and Financial Services and Other Activities (1990-1999), Job Gains/Job Losses/Net Change, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta**

**Chart 9**

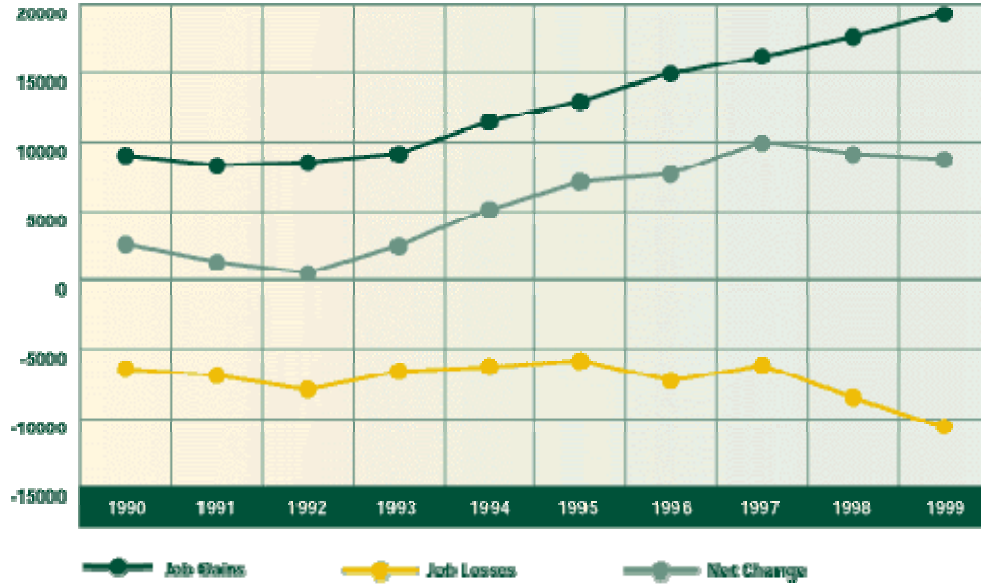


	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Job Gains	12,550	10,436	10,618	10,838	11,334	13,178	13,187	14,138	14,542	15,300
Job Losses	-9,948	-11,767	-10,983	-11,263	-9,557	-9,655	-8,400	-8,295	-9,175	-11,022
Net Change	2,602	-1,331	-365	-425	1,777	3,523	4,787	5,843	5,367	4,278

- The level of gross job gains recorded in 1999, at 15,300, was the highest achieved to date and represented a rise of 21.9% over the ten-year period 1990-1999, and 5.2% in 1999. Gross job gains have risen consistently over the period 1990-1999.
- The level of job losses in 1997, i.e. 8,295, was the lowest level recorded to date. However, in 1998 job losses rose to 9,175 (+ 10.6%) and increased by a further 20.1% to 11,022 in 1999. The level of job losses increased by 10.8% over the ten-year period 1990-1999 as a whole.
- Over the ten year period, 1990-1999, net change in Irish-owned industry declined from 2,602 in 1990 to a net job loss of -1331 in 1991 and to -425 in 1993. Net change recovered to a positive 1,777 in 1994 and in the following three years rose to a high of 5,843 in 1997, before declining to 5,367 in 1998 and to 4,278 in 1999. This is due to the high level of job losses recorded in the 1998-1999 period.

**Trends in Permanent Full-Time Employment in Foreign-Owned Manufacturing, Internationally Traded and Financial Services and Other Activities (1990-1999), Job Gains/Job Losses/Net Change, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta**

**Chart 10**



	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Job Gains	9,058	8,275	8,499	9,135	11,493	12,985	14,985	16,202	17,637	19,309
Job Losses	-6,447	-6,926	-7,947	-6,629	-6,321	-5,865	-7,312	-6,194	-8,519	-10,596
Net Change	2,611	1,349	552	2,506	5,172	7,120	7,673	10,008	9,118	8,713

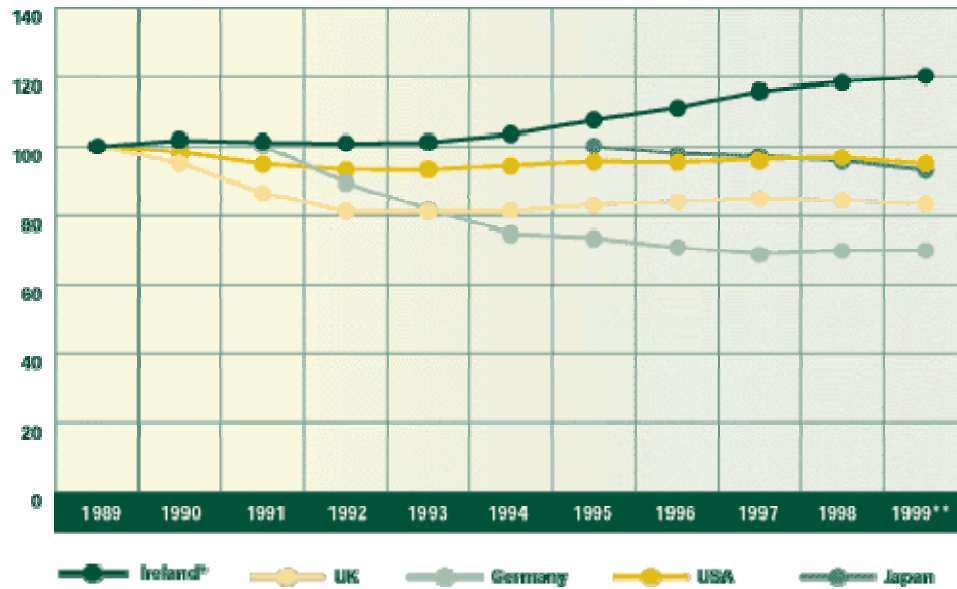
- The level of gross job gains recorded in 1999 at 19,309 was the highest achieved to date, and represented a rise of 113.2% over the ten-year period 1990-1999, and 9.5% in 1999.
- Job losses rose from 6,447 in 1990 to a high of 10,596 in 1999, which represents an increase of 64.4% over the ten-year period. Job losses have increased by 80.7% since 1995.
- Net change in foreign-owned companies stood at 2,611 in 1990 before declining to 552 in 1992. Since 1992, however, net change rose each year to reach a peak of 10,008 in 1997, the highest positive net change recorded over the period. However, net change declined by 8.9% in 1998 and by a further 4.4% in 1999, due to the rise in the level of job losses in these two years.



## INTERNATIONAL TRENDS IN MANUFACTURING EMPLOYMENT

International Trends in Manufacturing Employment (Employment Expressed as a percentage of 1989 level)<sup>3</sup>

Chart 11



	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
<b>Ireland*</b>	100.0	101.8	101.2	100.9	101.2	103.5	107.5	111	115.7	118.4	120.2
UK	100.0	94.8	86.6	81.1	80.9	81.1	83.1	84	84.9	84.2	83.3
Germany			100.0	89.5	81.7	74.5	73.4	70.7	68.7	69.7	69.7
USA	100.0	98.2	94.7	93.1	93	94.2	95.3	95.1	96.1	96.6	94.7
Japan							100.0	97.8	96.9	95.6	92.9

Source: OECD Main Economic Indicators January 2000

\* Forfás Employment Survey

\*\* Quarter 3

<sup>3</sup> Except Germany and Japan where employment is expressed as a percentage of the 1991 and 1995 levels respectively in the OECD Statistics

OCED figures show that Ireland is unusual in displaying significantly increased manufacturing employment over the eleven-year period 1989-1999. The above chart highlights the growth in manufacturing employment in Ireland over the last eleven years, and contrasts this with falls in the major economies for which data are available.

### **USA**

The USA suffered a decline in manufacturing employment of 5.3% since 1989. In contrast, Ireland's rate of manufacturing employment growth over the eleven-year period was 20.2%.

Manufacturing employment in the USA declined by 7.0% between 1989 and 1993.

However, employment recovered since then and increased by 1.8% between 1993 and the third quarter of 1999.

### **Japan**

Manufacturing employment in Japan declined by 7.1% between 1995 (when the OECD statistics were re-based) and the third quarter of 1999.

### **Germany**

The most substantial change has been evident in Germany. OECD statistics show that since unification in 1991, manufacturing employment in enterprises with 20 or more employees reduced by 30.3% up to the third quarter of 1999. The rate of decline slowed to 7.9% between 1994 and 1997, and employment in manufacturing, having increased by 1.5% between 1997 and 1998, remained static in 1999.

### **United Kingdom**

The decline in the UK continues a trend evident since the early 1980's. Between 1994 and 1998, however, this trend reversed. However, manufacturing employment again declined (by 1.1%) between 1998 and the third quarter of 1999.

### **Spain/Portugal**

Industrial employment in Spain declined by 16.5% between 1989 and 1994. However, employment has increased by 17.5% since 1994.

Industrial employment in Portugal declined by 4.1% between 1995 (when the OECD statistics were re-based) and 1998. Previous OECD statistics showed that industrial employment in Portugal declined by 14.4% between 1989 and 1995.

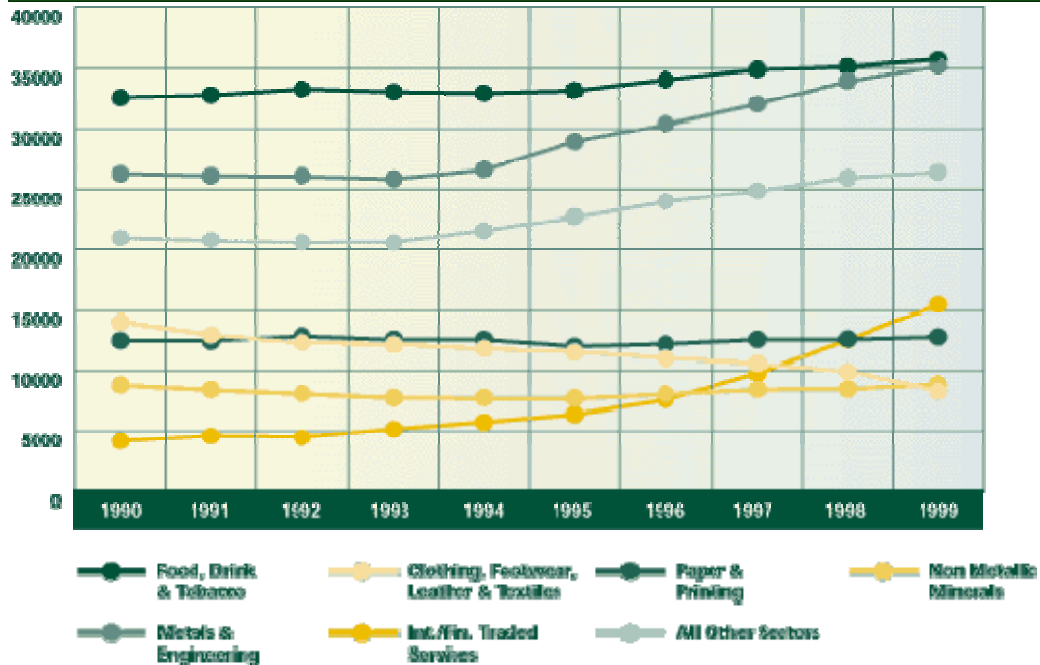
### **Other**

Manufacturing employment in Norway declined by 6% between 1989 and the third quarter of 1999, while industrial employment in Sweden fell by 20.8% over this period.

## SECTORIAL TRENDS

Sectoral Trends in Permanent Full-Time Employment in Irish-Owned, Manufacturing, Internationally Traded and Financial Services and Other Activities, Supported by the Agencies (1990-1999), IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Chart 15



Sector	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Food, Drink & Tobacco	32,547	32,736	33,256	33,010	32,902	33,118	34,011	34,857	35,113	35,724
Clothing, Footwear, Leather & Textiles	14,005	12,914	12,279	12,171	11,781	11,539	11,060	10,614	9,941	8,331
Paper & Printing	12,481	12,445	12,817	12,525	12,537	11,989	12,186	12,543	12,547	12,752
Non Metallic Minerals	8,787	8,384	8,060	7,736	7,719	7,687	8,039	8,412	8,476	8,860
Metals & Engineering	26,257	26,064	26,016	25,800	26,553	28,963	30,345	31,992	33,884	35,142
Int./Fin Traded Services	4,158	4,592	4,510	5,219	5,807	6,435	7,598	9,771	12,505	15,499

## 1999 Annual Employment Survey

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All Other Sectors	20,968	20,737	20,569	20,621	21,560	22,651	23,927	24,820	25,910	26,346
<b>Overall Total</b>	<b>119,203</b>	<b>117,872</b>	<b>117,507</b>	<b>117,082</b>	<b>118,859</b>	<b>122,382</b>	<b>127,166</b>	<b>133,009</b>	<b>138,376</b>	<b>142,654</b>

\* See Appendix 4 for more detailed sectoral analysis

Total permanent full-time employment in Irish-owned companies stood at 142,654 in 1999, a rise of 3.1% on 1998 and 19.7% higher than in 1990.

- The **Food Drink & Tobacco** sector now accounts for 25.0% of total employment in Irish-owned companies. However, this sector contributed just 14.3% of the total net increase in employment in Irish-owned companies in 1999.

- **Metals & Engineering (which includes Electronics)** now accounts for 24.6% of total Irish-owned employment but contributed 29.4% of the net increase in permanent full-time employment in Irish-owned companies in 1999. This sector's employment grew by 33.8% (8,885 jobs) since 1990.

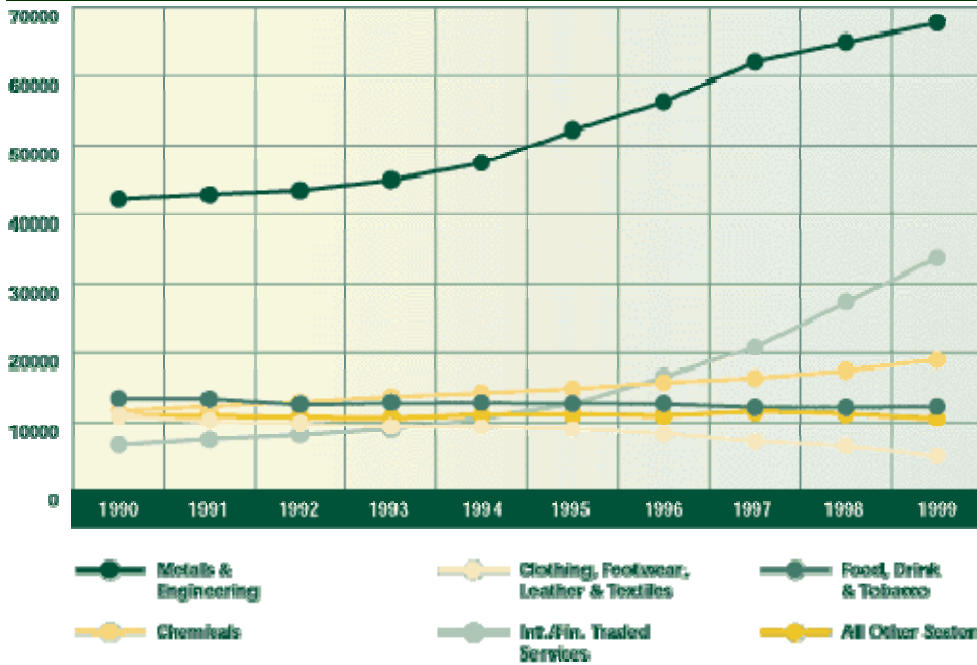
- **Internationally Traded/Financial Services** has been the fastest growing sector over the 10 year period (+272.8%/11,341 jobs). Permanent full-time employment in this sector rose by 23.9% or 2,994 jobs in 1999. This sector accounts for 10.9% of total employment in Irish-owned firms, yet contributed almost 70% of the net increase in permanent full-time employment in 1999.

- Permanent full-time employment in the **Paper/Printing and Non-Metallic Minerals** sectors remained relatively static over the 10 year period 1990-1999.

- **Clothing, Textiles, Footwear/Leather** sector suffered a major decline in permanent full-time employment over the 10 year period, decreasing by 40.5% (5,674 jobs). In 1999 alone this sector's employment level declined by 16.2%.

**Sectoral Trends in Permanent Full-Time Employment in Foreign-Owned, Manufacturing, Internationally Traded and Financial Services and Other Activities, Supported by the Agencies (1990-1999), IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta**

**Chart 16**



Sector	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Metals & Engineering	42,233	42,900	43,463	44,929	47,348	52,131	56,188	62,153	64,889	67,620
Chemicals	11,594	12,273	12,919	13,607	14,176	14,768	15,683	16,303	17,354	18,900
Food, Drink & Tobacco	13,335	13,315	12,496	12,715	12,729	12,707	12,594	12,135	12,103	12,203
Clothing, Footwear, Leather & Textiles	10,985	10,158	9,821	9,315	9,302	9,027	8,243	7,151	6,481	4,948
Int. Fin Traded Services	6,630	7,452	8,096	8,965	10,648	12,603	16,480	20,789	27,183	33,707
All Other Sectors	10,958	10,986	10,741	10,611	11,111	11,198	10,919	11,585	11,223	10,568
<b>Total All Sectors</b>	<b>95,735</b>	<b>97,084</b>	<b>97,536</b>	<b>100,142</b>	<b>105,314</b>	<b>112,434</b>	<b>120,107</b>	<b>130,116</b>	<b>139,233</b>	<b>147,946</b>

Total **permanent full-time** employment in **foreign-owned** companies stood at 147,946

in 1999, a rise of 6.3% on 1998, and 54.5% higher than in 1990.

- Employment in the **Metals & Engineering** sector (which includes Electronics) accounts for 45.7% of total employment in foreign-owned companies (67,620 jobs) and this represents an increase of 4.2% on 1998 and a 60.1% growth (25,387 jobs) over the ten-year period as a whole.
- The **Internationally Traded/Financial Services** sector has been the fastest growing sector over the ten-year period (+408.4%/27,077 jobs). Permanent full-time employment in this sector rose by 24.0% or 6,524 jobs in 1999. This sector accounts for 22.8% of total foreign-owned employment, but contributed 75% of the net increase in permanent full-time employment in foreign-owned companies in 1999.
- The **Pharmaceuticals/Chemicals** sector now accounts for 12.8% of total foreign-owned permanent full-time employment. This represents an increase of 8.9% on 1998 and a 63.0% rise or 7,306 jobs over the ten-year period as a whole.
- Employment in the **Food Drink & Tobacco** sector remained relatively static in 1999, recording a rise of just 0.8% in that year. Employment over the ten years has declined by 8.5% (1,132 jobs) overall.
- Permanent full-time employment in the **Textiles, Clothing, Footwear/Leather** sector has declined by 55.0% over the 10 year period. Declines occurred in each year over the period with the highest year on year decrease occurring in 1999 (-23.7%).

## APPENDICES 1-5

## APPENDIX 1

## REGIONAL TRENDS IN PERMANENT FULL-TIME EMPLOYMENT AND PART-TIME, TEMPORARY AND SHORT TERM CONTRACT EMPLOYMENT (1990-1999), ALL OWNERSHIP, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 3: Trends in Permanent Full-Time Employment

Region	1990	1992	1994	1996	1997	1998	1999	% Change		
								98-99	90-99	
Dublin	59,377	58,312	59,824	69,070	76,334	83,350	91,611	8,261	9.9	54.3
Mid East	15,097	15,313	17,934	22,004	24,734	24,977	25,908	931	3.7	71.6
Mid West	22,194	23,570	24,334	26,811	27,804	29,934	31,653	1,719	5.7	42.6
South West	31,854	31,703	33,334	35,511	36,636	38,513	40,593	2,080	5.4	27.4
South East	25,942	25,529	25,163	26,735	27,465	27,498	28,106	608	2.2	8.3
West	19,006	19,185	19,962	22,511	24,267	26,196	26,509	313	1.2	39.5
Midlands	11,522	10,927	11,428	11,964	12,599	13,042	12,895	-147	-1.1	11.9
Border	29,946	30,604	32,194	32,667	33,285	34,099	33,325	-774	-2.3	11.3
<b>Total</b>	<b>214,938</b>	<b>215,143</b>	<b>224,173</b>	<b>247,273</b>	<b>263,124</b>	<b>277,609</b>	<b>290,600</b>	<b>12,991</b>	<b>4.7</b>	<b>35.2</b>

Table 4: Regional Trends in Part-Time, Temporary and Short-Term Contract Employment\*

Region	1990	1992	1994	1996	1997	1998	1999	% Change		
								98-99	90-99	
Dublin	3,631	3,365	4,907	6,590	7,958	9,597	10,914	1,317	13.7	200.6
Mid East	1,125	1,302	3,016	2,352	2,318	2,961	2,698	-263	-8.9	139.8
Mid West	344	274	916	675	1,379	1,155	899	-256	-22.2	161.3
South West	3,502	3,608	5,074	5,110	5,519	6,172	5,443	-729	-11.8	55.4
South East	1,886	1,866	2,723	2,981	3,858	3,069	3,595	526	17.1	90.6

## 1999 Annual Employment Survey

West	1,231	1,238	1,600	2,821	3,630	4,066	4,540	474	11.7	268.8
Midlands	680	735	1,264	792	978	1,191	1,264	73	6.1	85.9
Border	1,946	2,266	3,381	3,818	4,180	3,683	3,891	208	5.6	99.9
<b>Total</b>	<b>14,345</b>	<b>14,654</b>	<b>22,881</b>	<b>25,139</b>	<b>29,820</b>	<b>31,894</b>	<b>33,244</b>	<b>1,350</b>	<b>4.2</b>	<b>131.7</b>

\*Excludes Shannon Development

## APPENDIX 2

### REGIONAL TRENDS IN PERMANENT FULL TIME EMPLOYMENT AND PART-TIME, TEMPORARY AND SHORT TERM CONTRACT EMPLOYMENT (1990-1999), Irish-Owned/Foreign-Owned Components, IDA Ireland, Enterprise Ireland, Shannon Development<sup>11</sup> and Údarás na Gaeltachta

Table 5: Trends in Irish-Owned Permanent Full-Time Employment

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Dublin	33,444	32,928	32,291	32,238	31,956	33,250	34,920	37,582	39,512	41,345
Mid East	9,294	9,043	9,004	9,441	9,796	10,173	10,859	11,454	11,591	11,785
Mid West	9,205	9,608	9,575	9,472	9,713	10,148	10,511	10,659	11,150	11,762
South West	17,475	17,346	17,426	17,694	17,734	18,218	18,650	19,280	19,918	20,312
South East	16,014	15,941	15,822	15,248	15,463	15,332	15,901	16,165	16,310	16,775
West	9,542	9,358	9,887	9,942	10,482	10,697	11,288	11,963	12,763	13,081
Midlands	5,582	5,294	5,309	5,101	5,441	5,827	6,037	6,515	6,944	7,252
Border	18,647	18,354	18,193	17,946	18,274	18,737	19,000	19,391	20,188	20,342
<b>Overall Total</b>	<b>119,203</b>	<b>117,872</b>	<b>117,507</b>	<b>117,082</b>	<b>118,859</b>	<b>122,382</b>	<b>127,166</b>	<b>133,009</b>	<b>138,376</b>	<b>142,654</b>

Table 6: Trends in Irish-Owned Part-Time, Temporary and Short-Term Contract Employment

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Dublin	2,012	1,667	1,690	1,994	2,323	2,840	3,041	3,683	4,296	4,582
Mid East	725	819	859	995	1,064	1,232	1,185	1,428	1,667	1,885



## 1999 Annual Employment Survey

South West	1,722	1,709	1,646	2,045	2,240	2,530	2,670	2,420	2,446	2,305
South East	1,367	1,499	1,302	1,542	2,017	1,935	1,808	1,681	1,540	1,979
West	907	924	990	1,192	1,232	1,542	1,672	2,019	1,902	1,997
Midlands	399	270	400	482	651	568	459	411	555	666
Border	1,443	1,347	1,740	2,339	2,482	2,586	2,773	2,628	2,561	2,759
<b>Overall Total</b>	<b>8,575</b>	<b>8,235</b>	<b>8,627</b>	<b>10,589</b>	<b>12,009</b>	<b>13,233</b>	<b>13,608</b>	<b>14,270</b>	<b>14,967</b>	<b>16,173</b>

11 Shannon Development do not report on Part-Time, Temporary and Short-Term Contract Employment

### Table 7: Trends in Foreign-Owned Permanent Full-Time Employment

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Dublin	25,933	26,159	26,021	26,419	27,868	30,747	34,150	38,752	43,838	50,266
Mid East	5,803	5,912	6,309	7,163	8,138	9,621	11,145	13,280	13,386	14,123
Mid West	12,989	13,098	13,995	13,832	14,621	15,462	16,300	17,145	18,784	19,891
South West	14,379	14,588	14,277	15,534	15,600	16,065	16,861	17,356	18,595	20,281
South East	9,928	9,885	9,707	9,696	9,700	9,963	10,834	11,300	11,188	11,331
West	9,464	9,717	9,298	8,898	9,480	10,341	11,223	12,304	13,433	13,428
Midlands	5,940	5,816	5,618	5,800	5,987	5,842	5,927	6,084	6,098	5,643
Border	11,299	11,909	12,411	12,800	13,920	14,393	13,667	13,894	13,911	12,983
<b>Overall Total</b>	<b>95,735</b>	<b>97,084</b>	<b>97,636</b>	<b>100,142</b>	<b>105,314</b>	<b>112,434</b>	<b>120,107</b>	<b>130,115</b>	<b>139,233</b>	<b>147,946</b>

### Table 8: Trends in Foreign-Owned Part-Time, Temporary and Short-Term Contract Employment

	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999
Dublin	1,619	1,574	1,675	2,003	2,584	3,070	3,549	4,275	5,301	6,332
Mid East	400	298	443	583	1,952	1,967	1,167	890	1,294	813
Mid West	344	50	274	617	916	1,658	675	1,379	1,155	899

1999 Annual Employment Survey

South West	1,780	1,618	1,962	2,064	2,834	3,311	2,440	3,099	3,726	3,138
South East	519	374	564	616	706	1,012	1,173	2,177	1,529	1,616
West	324	416	248	262	368	953	1,149	1,611	2,164	2,543
Midlands	281	227	335	383	613	520	333	567	636	598
Border	503	545	526	690	899	794	1,045	1,552	1,122	1,132
<b>Overall Total</b>	<b>5,770</b>	<b>5,102</b>	<b>6,027</b>	<b>7,218</b>	<b>10,872</b>	<b>13,285</b>	<b>11,531</b>	<b>15,550</b>	<b>16,927</b>	<b>17,071</b>

### APPENDIX 3

#### SECTORAL TRENDS IN PERMANENT FULL TIME EMPLOYMENT AND PART-TIME, TEMPORARY AND SHORT-TERM CONTRACT EMPLOYMENT (1990-1999), ALL OWNERSHIP, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 9: Sectoral Trends in Permanent-Full time Employment

Sector								% Change		% Change	
	1990	1992	1994	1996	1997	1998	1999	98-99	98-99	90-99	
Food	38,757	39,220	39,596	40,659	41,356	41,639	41,994	355	0.9	8.4	
Drink & Tobacco	7,125	6,532	6,035	5,946	5,636	5,577	5,933	356	6.4	-16.7	
Textiles	10,962	10,337	10,261	9,550	8,832	8,007	6,591	-1416	-17.7	-39.9	
Clothing, Footwear & Leather	14,028	11,763	10,822	9,753	8,933	8,415	6,688	-1727	-20.5	-52.3	
Wood & Wood Products	4,882	4,577	4,899	5,624	5,964	6,317	6,647	330	5.2	36.2	
Paper & Printing	14,619	14,819	14,630	13,897	14,319	14,250	14,410	160	1.1	-1.4	
Chemicals	14,834	16,156	17,625	19,440	20,214	21,370	22,685	1315	6.2	52.9	
Plastics & Rubber	8,117	8,208	8,562	9,226	9,660	9,802	9,626	-176	-1.8	18.6	
Non Metallic Minerals	11,617	10,712	10,095	10,178	10,520	10,369	10,723	354	3.4	-7.7	

## 1999 Annual Employment Survey

Metal & Engineering	68,490	69,479	73,901	86,533	94,144	98,773	102,762	3989	4.0	50.0
Furniture	4,431	4,224	4,310	4,695	4,939	5,183	5,184	1	0.0	17.0
Misc Manufacturing	3,672	3,718	4,179	4,403	4,602	4,758	4,704	-54	-1.1	28.1
Financial Services	731	1,268	2,118	3,319	3,925	4,853	6,684	1831	37.7	814.4
Internationally Traded Services	10,057	11,338	14,437	20,759	26,635	34,835	42,522	7687	22.1	322.8
Mining/Quarrying & Indigenous Services	2,616	2,792	2,803	3,291	3,445	3,461	3,447	-14	-0.4	31.8
<b>Total</b>	<b>214,938</b>	<b>215,143</b>	<b>224,273</b>	<b>247,273</b>	<b>263,124</b>	<b>277,609</b>	<b>290,600</b>	<b>12,991</b>	<b>4.7</b>	<b>35.2</b>

**Table 10: Sectoral Trends in Part-Time Temporary and Short-Term Contract Employment**

Sector								% Change		% Change	
	1990	1992	1994	1996	1997	1998	1999	98-99	98-99	90-99	
Food	4,928	4,622	6,025	6,391	5,854	5,481	5,640	159	2.9	14.4	
Drink & Tobacco	391	583	683	729	723	752	757	5	0.7	93.6	
Textiles	666	576	737	453	599	560	572	12	2.1	-14.1	
Clothing, Footwear & Leather	497	288	495	558	468	561	581	20	3.6	16.9	
Wood & Wood Products	242	241	211	305	374	343	378	35	10.2	56.2	
Paper & Printing	609	645	774	972	937	1,118	1,337	219	19.6	119.5	
Chemicals	1,069	1,062	1,491	1,591	2,048	2,417	2,417	0	0.0	126.1	
Plastics & Rubber	351	325	615	537	697	666	881	215	32.3	151.0	
Non Metallic Minerals	733	614	757	765	706	782	1,158	376	48.1	58.0	
Metal & Engineering	3,021	3,103	6,717	6,875	10,043	10,037	10,374	337	3.4	243.4	

1999 Annual Employment Survey

Furniture	145	93	146	185	232	198	192	-6	-3.0	32.4
Misc Manufacturing	316	376	488	684	1,246	1,479	1,456	-23	-1.6	360.8
Financial Services	23	40	116	91	138	200	316	116	58.0	1273.9
Internationally										
Traded Services	721	1,151	2,324	3,506	4,156	5,814	5,619	-195	-3.4	679.3
Mining/Quarrying & Indigenous Services	633	935	1,302	1,497	1,599	1,486	1,566	80	5.4	147.4
<b>Total</b>	<b>14,345</b>	<b>14,654</b>	<b>22,881</b>	<b>25,139</b>	<b>29,820</b>	<b>31,894</b>	<b>33,244</b>	<b>1,350</b>	<b>4.2</b>	<b>131.7</b>

**APPENDIX 4**

**SECTORAL TRENDS IN PERMANENT FULL-TIME EMPLOYMENT (1990-1999), Irish-Owned/Foreign-Owned Components, IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta**

Table 11: Irish-Owned Sectoral Trends in Permanent Full-time Employment

	1990	1992	1994	1996	1997	1998	1999	% Change 98-99	% Change 98-99	% Change 90-99
Non Metallic										
Minerals	8,787	8,060	7,719	8,039	8,412	8,476	8,860	384	4.5	0.8
Clothing, Footwear & Leather	9,508	8,242	7,497	6,870	6,538	6,199	4,802	-1,397	-22.5	-49.5
Textiles	4,497	4,037	4,284	4,190	4,076	3,742	3,529	-213	-5.7	-21.5
Drink & Tobacco	1,913	1,869	1,637	1,672	1,649	1,639	1,661	22	1.3	-13.2
Food	30,634	31,387	31,265	32,339	33,208	33,474	34,063	589	1.8	11.2
Int./Fin Traded Services	4,158	4,510	5,807	7,598	9,771	12,505	15,499	2,994	23.9	272.8
Metals & Engineering	26,257	26,016	26,553	30,345	31,992	33,884	35,142	1,258	3.7	33.8
Paper & Printing	12,481	12,817	12,537	12,186	12,543	12,547	12,752	205	1.6	2.2

## 1999 Annual Employment Survey

Mining, Quarrying, Indigenous & Other Services	2,082	2,166	2,056	2,423	2,450	2,479	2,586	107	4.3	24.2
Miscellaneous Manufacturing	2,345	2,194	2,511	2,708	2,876	3,084	3,277	193	6.3	39.7
Chemicals	3,240	3,237	3,449	3,757	3,911	4,016	3,785	-231	-5.8	16.8
Plastics & Rubber	4,413	4,565	4,747	5,303	5,490	5,647	5,745	98	1.7	30.2
Wood & Wood Products	4,471	4,197	4,491	5,046	5,159	5,506	5,776	270	4.9	29.2
Furniture	4,417	4,210	4,306	4,690	4,934	5,178	5,177	-1	0.0	17.2
<b>Overall Total</b>	<b>119,203</b>	<b>117,507</b>	<b>118,859</b>	<b>127,166</b>	<b>133,009</b>	<b>138,376</b>	<b>142,654</b>	<b>4,278</b>	<b>3.1</b>	<b>19.7</b>

**Table 12: Foreign-Owned Sectoral Trends in Permanent Full-time Employment**

	1990	1992	1994	1996	1997	1998	1999	% Change 98-99	% Change 98-99	% Change 90-99
Chemicals	11,594	12,919	14,176	15,683	16,303	17,354	18,900	1,546	8.9	63.0
Clothing, Footwear & Leather	4,520	3,521	3,325	2,883	2,395	2,216	1,886	-330	-14.9	-58.3
Textiles	6,465	6,300	5,977	5,360	4,756	4,265	3,062	-1,203	-28.2	-52.6
Drink & Tobacco	5,212	4,663	4,398	4,274	3,987	3,938	4,272	334	8.5	-18.0
Food	8,123	7,833	8,331	8,320	8,148	8,165	7,931	-234	-2.9	-2.4
Financial Services	450	887	1,541	2,711	3,206	3,935	5,211	1,276	32.4	1058.0

## 1999 Annual Employment Survey

Internationally Traded										
Services	6,180	7,209	9,107	13,769	17,583	23,248	28,496	5,248	22.6	361.1
Metals &										
Engineering	42,233	43,463	47,348	56,188	62,153	64,889	67,620	2,731	4.2	60.1
Mining, Quarrying,										
Indigenous & Other										
Services	534	626	747	868	995	982	861	-121	-12.3	61.2
Miscellaneous										
Manufacturing	1,327	1,424	1,668	1,695	1,726	1,674	1,427	-247	-14.8	7.5
Non Metallic Minerals	2,830	2,652	2,376	2,139	2,108	1,893	1,863	-30	-1.6	-34.2
Paper & Printing	2,138	2,002	2,093	1,711	1,776	1,703	1,658	-45	-2.6	-22.5
Plastics & Rubber	3,704	3,643	3,815	3,923	4,170	4,155	3,881	-274	-6.6	4.8
Wood & Wood										
Products	411	380	408	578	805	811	871	60	7.4	111.9
Furniture	14	14	4	5	5	5	7	2	40.0	-50.0
<b>Overall Total</b>	<b>95,735</b>	<b>97,536</b>	<b>105,314</b>	<b>120,107</b>	<b>130,116</b>	<b>139,233</b>	<b>147,946</b>	<b>8,713</b>	<b>6.3</b>	<b>54.5</b>

## APPENDIX 5

### OVERVIEW OF METHODOLOGY AND DEFINITIONS

This survey is carried out by postal card and extensive telephone follow-up.

In line with previous years, census returns as at the last Friday in October (31st this year) for permanent and for part-time, temporary and short-term contract employment were sought.

In the presentation of the results we have reflected the nationality of companies at the time of reporting. In the light of changes of ownership, the inclusion of new companies and the correction of identified errors, historic employment figures have been restated where appropriate. Therefore, the figures will differ slightly from those previously reported.

### Definitions

#### Permanent Full-time

Employees who will have been employed full-time for nine months or longer or who will be on contracts of nine months or longer on 31 October.

Employees who will have been employed for less than 9 months in the 12 months to 31 October or who are employed on a casual basis or on employment contracts of

## 1999 Annual Employment Survey

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less than 9 months.

Employees who work on a continuous basis on agreed shorter working hours (less than twenty-five hours a week) but who are employed on 31 October. For example, job sharing or short extra shift staff.

Increase in employment (calculated on a company by company basis) arising in the survey year over and above the employment level in the previous year. Job gains include both grant-aided and non-grant aided companies.

Temporary/Short-term Contract

Part-time

Job Gains

Job Losses            Decrease in employment (calculated on a company  
by company basis) arising in the survey.

Net Change            Difference between the total job gains and the total  
job losses.

Data in the report is included on the following basis:

- Permanent full-time employment for companies under the remit of Enterprise Ireland, IDA Ireland, Shannon Development and Údarás na Gaeltachta.
- Part-time, temporary and short-term contract employment for companies under the remit of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta.