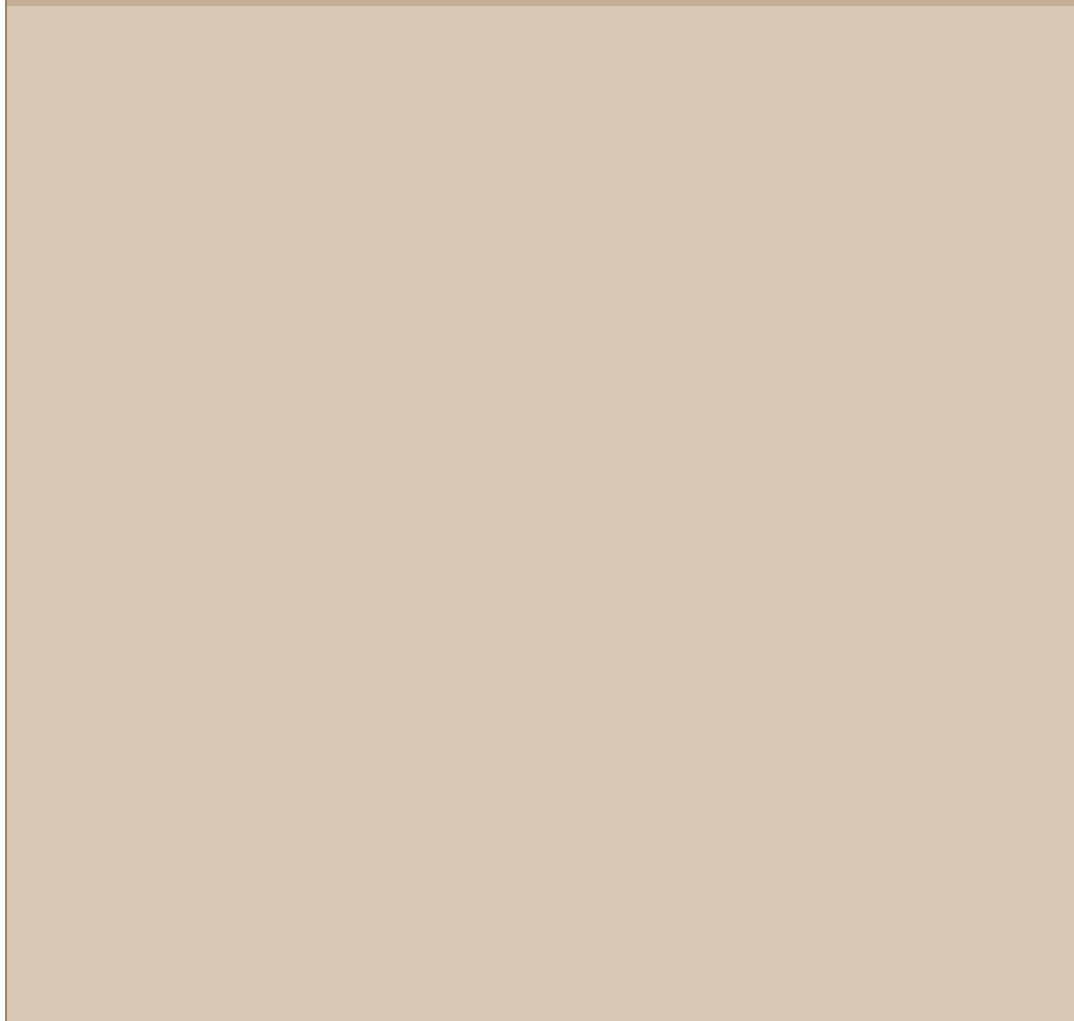




# Annual Employment Survey, 2000







# Reports Published by Forfás 2000 - 2001

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*comhairle a chur ar an Aire ó thaobh cúrsaí a bhaineann le forbairt tionscail sa Stát*

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Forfás is the national policy and advisory board for enterprise, trade, science, technology and innovation. It is the body in which the State's legal powers for industrial promotion and technology development have been vested. It is also the body through which powers are delegated to Enterprise Ireland for the promotion of indigenous industry and to IDA Ireland for the promotion of inward investment. The broad functions of Forfás are to:

*advise the Minister on matters relating to the development of industry in the State*

*to advise on the development and co-ordination of policy for Enterprise Ireland, IDA Ireland and such other bodies (established by or under statute) as the Minister may by order designate*

*encourage the development of industry, technology, marketing and human resources in the State*

*encourage the establishment and development in the State of industrial undertakings from outside the State, and*

*advise and co-ordinate Enterprise Ireland and IDA Ireland in relation to their functions.*

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# APPENDIX 5

## OVERVIEW OF METHODOLOGY AND DEFINITIONS

The Annual Employment Survey is carried out by postal card and extensive follow-up.

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

In the presentation of the results, we have reflected the nationality of any 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 31st October.
Temporary, Short-Term Contract	Employees who will have been employed for less than 9 months to 31st October or who are employed on a casual basis or on employment contracts of less than 9 months.
Part-Time	Employees who work on a continuous basis on agreed shorter working hours (less than twenty-five hours a week) but who are employed on 31st October. For example, job sharing or short extra shift staff.
Job Gains	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.
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.



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

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Chemicals	12,273	13,604	14,768	16,306	18,831	20,109	1,278	6.8	63.8
Clothing, Footwear & Leather	3,958	3,117	3,153	2,355	1,841	1,190	-651	-35.4	-69.9
Drink & Tobacco	5,100	4,532	4,523	3,987	4,272	4,258	-14	-0.3	-16.5
Financial Services	653	1,027	1,982	3,171	5,364	6,607	1,243	23.2	911.8
Food	8,255	8,183	8,184	8,148	7,931	8,748	817	10.3	6.0
Furniture	14	14	5	5	7	6	-1	-14.3	-57.1
Internationally Traded Services	6,745	7,889	10,635	17,609	28,609	34,420	5,811	20.3	410.3
Metals & Engineering	42,884	44,754	51,948	61,778	66,915	74,846	7,931	11.9	74.5
Mining, Quarrying & Indigenous Services	604	691	844	1,077	921	930	9	1.0	54.0
Miscellaneous Manufacturing	1,376	1,575	1,834	1,726	1,427	1,293	-134	-9.4	-6.0
Non-Metallic Minerals	2,535	2,138	1,950	1,879	1,641	1,655	14	0.9	-34.7
Paper & Printing	2,186	2,092	2,166	1,897	1,783	1,700	-83	-4.7	-22.2
Plastics & Rubber	3,764	3,608	3,837	4,101	3,854	4,032	178	4.6	7.1
Textiles	6,455	6,396	6,039	4,888	3,191	2,977	-214	-6.7	-53.9
Wood & Wood Products	365	381	445	805	871	887	16	1.8	143.0
	<b>97,167</b>	<b>100,001</b>	<b>112,313</b>	<b>129,732</b>	<b>147,458</b>	<b>163,658</b>	<b>16,200</b>	<b>11.0</b>	<b>68.4</b>

# PREFACE

This document sets out the final results of the 2000 Annual Employment Survey<sup>1</sup>. The survey is an annual census of employment in all known manufacturing, 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 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 in the Forfás database. Similarly, Údarás na Gaeltachta carries out the survey for client companies in its portfolio and provides the results for inclusion in 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 and covers the period 1991-2000. 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 currently does not collect data on 'non-permanent' forms of employment.

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

**Section 3** (and Appendices 1 and 2) provides a regional analysis of permanent full-time employment and part-time temporary and short-term contract employment.

**Section 4** (and Appendices 3 and 4) analyses sectoral trend data for permanent full-time and part-time temporary and short-term contract employment.

<sup>1</sup> *An overview of this survey, together with the methodology and definitions used for each employee category is provided in Appendix 5.*

# Key National Employment Trends

Permanent full-time employment in manufacturing, internationally traded and financial services and other activities supported by the development agencies rose to 315,959 in 2000, the highest level recorded.

The number of new permanent full-time jobs created in 2000 amounted to 44,035, which represents an increase of 21.1% on the levels achieved in 1999 and is the highest recorded to date. The level of permanent full-time jobs lost stood at 21,127 in 2000 which represents a decrease of 1.9% on the level of job losses recorded in 1999. However, the number of net jobs created in 2000 rose to an all time high of 22,908 and represents an increase of 54.6% on the net change achieved in 1999.

Internationally traded/financial services activities accounted for 11,769 (51.4%) of the total net increase of 22,908 in permanent full-time employment in 2000. Permanent full-time employment in manufacturing accounted for 10,978 net jobs, or 47.9% of the total increase in permanent full-time employment recorded in 2000. It should be noted that a certain number of jobs in manufacturing companies, that are included in the total of manufacturing employment for the purposes of this survey, could be classified as services employment, i.e. accounting, administration, data processing etc. Thus there is a blurring of the lines between manufacturing and traded services activities overall.

Foreign-owned companies accounted for 16,200 (70.7%) of the net employment growth with Irish-owned companies contributing the balance of 6,708 (29.3%) net jobs in 2000. Employment grew by 11.0% in foreign-owned companies in 2000, and by 4.6% in Irish-owned companies.

On a sectoral basis, two sectors, internationally traded services and metals & engineering (which includes electronics) accounted for 91.0% of the net change in permanent full-time employment of 22,908 in 2000. 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 1,589 (+23.3%) in 2000.

On a regional basis, each region with the exception of the Midlands recorded a positive net change in permanent full-time employment in 2000. The South West recorded the highest increase (+14.0%) and accounted for 24.9% of all net new jobs created in 2000. Dublin had the second highest increase (+11.5%) but accounted for 46.7% of all net new jobs created in 2000. Companies in the BMW region (Border, Midlands, West) recorded an increase in net permanent full-time jobs of 2,431 (+3.3%) in 2000, compared with a net loss of -382 in 1999. The percentage of new job creation in the BMW region also increased in 2000, rising from 18.0% of the national total in 1999 to 20.8% in 2000. It is the 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 future.

Permanent full-time employment in manufacturing rose by 24.7% since 1991, 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.

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 6.3% of all jobs in 1991 to 10.2% in 2000. This form of employment grew by 2.5% in Irish-owned firms in 2000 but declined by 3.9% in foreign-owned firms. The decline in 'non-permanent' employment in foreign-owned firms in 2000 could be due to temporary employees being made permanent in response to the tightening labour/skills market. Thus there is a certain amount of interaction between permanent and temporary forms of employment.

# APPENDIX 4

## Sectoral Trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1991-2000)

### Irish-Owned/Foreign Owned Components

### IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

**Table 11** *Sectoral Trends in Irish-Owned Full-Time Permanent Employment*

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Chemicals	3,242	3,320	3,533	3,923	3,867	3,880	13	0.3	19.7
Clothing, Footwear & Leather	8,796	7,865	7,347	6,578	4,850	3,939	-911	-18.8	-55.2
Drink & Tobacco	1,884	1,685	1,604	1,649	1,672	1,871	199	11.9	-0.7
Financial Services	371	470	604	713	1,464	1,810	346	23.6	387.9
Food	30,818	31,322	31,507	33,219	34,545	34,753	208	0.6	12.8
Furniture	4,274	4,142	4,347	4,934	5,218	5,240	22	0.4	22.6
Internationally Traded Services	4,231	4,805	6,076	9,492	15,040	19,409	4,369	29.0	358.7
Metals & Engineering	25,749	25,650	28,704	31,711	35,217	36,329	1,112	3.2	41.1
Mining, Quarrying & Indigenous Services	2,009	1,984	2,198	2,370	2,696	2,835	139	5.2	41.1
Miscellaneous Manufacturing	2,255	2,390	2,675	2,878	3,326	3,474	148	4.4	54.1
Non-Metallic Minerals	8,634	8,086	8,137	8,962	9,530	10,297	767	8.0	19.3
Paper & Printing	12,358	12,424	11,874	12,420	12,776	12,934	158	1.2	4.7
Plastics & Rubber	4,783	4,725	5,341	5,726	5,985	6,175	190	3.2	29.1
Textiles	4,118	4,306	4,192	4,076	3,534	3,431	-103	-2.9	-16.7
Wood & Wood Products	4,376	4,220	4,725	5,159	5,873	5,924	51	0.9	35.4
	<b>117,898</b>	<b>117,394</b>	<b>122,864</b>	<b>133,810</b>	<b>145,593</b>	<b>152,301</b>	<b>6,708</b>	<b>4.6</b>	<b>29.2</b>

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

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Chemicals	997	1,091	1,609	2,046	2,402	2,546	144	6.0	155.4
Clothing, Footwear & Leather	339	375	553	468	582	548	-34	-5.8	61.7
Drink & Tobacco	475	610	553	723	757	831	74	9.8	74.9
Financial Services	39	42	133	133	308	259	-49	-15.9	564.1
Food	4,365	5,789	6,065	5,854	5,401	5,854	453	8.4	34.1
Furniture	89	127	187	232	192	198	6	3.1	122.5
Internationally Traded Services	857	1,612	3,249	4,164	5,855	5,888	33	0.6	587.0
Metals & Engineering	2,643	4,040	8,807	10,037	10,455	9,787	-668	-6.4	270.3
Mining, Quarrying & Indigenous Services	743	1,174	1,616	1,599	1,853	1,985	132	7.1	167.2
Miscellaneous Manufacturing	320	298	654	1,260	1,468	1,481	13	0.9	362.8
Non-Metallic Minerals	733	592	743	693	1,181	924	-257	-21.8	26.1
Paper & Printing	657	731	947	937	1,357	1,213	-144	-10.6	84.6
Plastics & Rubber	281	465	568	689	886	793	-93	-10.5	182.2
Textiles	575	648	613	599	591	690	99	16.8	20.0
Wood & Wood Products	201	227	215	374	382	420	38	9.9	109.0
	<b>13,314</b>	<b>17,821</b>	<b>26,512</b>	<b>29,808</b>	<b>33,670</b>	<b>33,417</b>	<b>-253</b>	<b>-0.8</b>	<b>151.0</b>

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# APPENDIX 3

## Sectoral Trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1991-2000)

### All Ownership

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

**Table 9** *Sectoral Trends in Full-Time Permanent Employment*

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Chemicals	15,515	16,924	18,301	20,229	22,698	23,989	1,291	5.7	54.6
Clothing, Footwear & Leather	12,754	10,982	10,500	8,933	6,691	5,129	-1,562	-23.3	-59.8
Textiles	10,573	10,702	10,231	8,964	6,725	6,408	-317	-4.7	-39.4
Food	39,073	39,505	39,691	41,367	42,476	43,501	1,025	2.4	11.3
Drink & Tobacco	6,984	6,217	6,127	5,636	5,944	6,129	185	3.1	-12.2
Furniture	4,288	4,156	4,352	4,939	5,225	5,246	21	0.4	22.3
Internationally Traded Services	10,976	12,694	16,711	27,101	43,649	53,829	10,180	23.3	390.4
Financial Services	1,024	1,497	2,586	3,884	6,828	8,417	1,589	23.3	722.0
Metals & Engineering	68,633	70,404	80,652	93,489	102,132	111,175	9,043	8.9	62.0
Mining, Quarrying & Indigenous Services	2,613	2,675	3,042	3,447	3,617	3,765	148	4.1	44.1
Miscellaneous Manufacturing	3,631	3,965	4,509	4,604	4,753	4,767	14	0.3	31.3
Non-Metallic Minerals	11,169	10,224	10,087	10,841	11,171	11,952	781	7.0	7.0
Paper & Printing	14,544	14,516	14,040	14,317	14,559	14,634	75	0.5	0.6
Plastics & Rubber	8,547	8,333	9,178	9,827	9,839	10,207	368	3.7	19.4
Wood & Wood Products	4,741	4,601	5,170	5,964	6,744	6,811	67	1.0	43.7
	<b>215,065</b>	<b>217,395</b>	<b>235,177</b>	<b>263,542</b>	<b>293,051</b>	<b>315,959</b>	<b>22,908</b>	<b>7.8</b>	<b>46.9</b>



**Table 7** *Trends in Foreign-Owned Permanent Full Time Employment*

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	26,150	26,016	26,417	27,866	30,745	34,118	38,711	43,788	50,229	57,532
Mid East	5,684	6,096	6,955	7,874	9,363	10,887	13,051	13,158	13,512	15,091
Mid West	13,169	13,871	13,657	14,488	15,353	16,122	16,951	18,582	19,950	21,468
South West	14,504	14,249	15,493	15,529	16,004	16,745	17,217	18,509	20,182	23,718
South East	10,140	9,919	9,894	9,909	10,128	11,001	11,399	11,266	11,398	11,546
West	9,801	9,392	8,996	9,589	10,451	11,333	12,425	13,554	13,553	15,423
Midlands	5,856	5,658	5,840	6,049	5,910	5,980	6,137	6,151	5,706	5,613
Border	11,861	12,376	12,747	13,880	14,357	13,620	13,841	13,860	12,928	13,267
<b>Overall Total</b>	<b>97,165</b>	<b>97,577</b>	<b>99,999</b>	<b>105,184</b>	<b>112,311</b>	<b>119,806</b>	<b>129,732</b>	<b>138,868</b>	<b>147,458</b>	<b>163,658</b>

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

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	1,574	1,675	2,003	2,584	3,070	3,549	4,270	5,301	6,220	5,516
Mid East	278	443	581	1,942	1,957	1,157	877	1,281	974	1,021
Mid West	50	274	616	916	1,658	675	1,379	1,155	899	263
South West	1,618	1,950	2,064	2,831	3,310	2,423	3,091	3,723	3,263	3,334
South East	374	589	629	708	1,012	1,174	2,174	1,524	1,623	1,993
West	416	248	262	368	953	1,149	1,611	2,164	2,543	2,392
Midlands	227	335	383	613	520	333	567	636	598	1,022
Border	545	526	690	899	794	1,045	1,552	1,122	1,132	1,043
<b>All Regions</b>	<b>5,082</b>	<b>6,040</b>	<b>7,228</b>	<b>10,861</b>	<b>13,274</b>	<b>11,505</b>	<b>15,521</b>	<b>16,906</b>	<b>17,252</b>	<b>16,584</b>

# 1

# Survey Results

(ENTERPRISE IRELAND, IDA IRELAND, SHANNON DEVELOPMENT AND ÚDARÁS NA GAELTACHTA)

## 1.1

### MAIN FINDINGS FOR 2000

- ▶ Overall permanent full-time employment in manufacturing and internationally traded/financial services and other activities grew by 22,908 (7.8%) to reach a high of 315,959 in 2000.
  - Foreign-owned companies accounted for 16,200 (70.7%) of the growth with Irish-owned companies contributing 6,708 (29.3%) in 2000.
- ▶ 1,487 foreign-owned companies (including foreign-owned Shannon Development and Údarás na Gaeltachta client firms) accounted for 163,658 (51.8%), and 7,126 Irish-owned companies for 152,301 (48.2%) of total permanent full-time employment of 315,959 in 2000 (Chart 1).
- ▶ Manufacturing employment accounted for 10,978 (47.9%) and internationally-traded/financial services for 11,769 (51.4%) of the total net increase of 22,908 in permanent full-time employment in 2000 (Chart 3).
  - The increase of 10,978 recorded in permanent full-time employment in manufacturing in 2000 represents a rise of 4.6% on the 1999 out-turn, and was the highest recorded over the past ten years. Foreign-owned companies increased manufacturing employment by 9,137 (8.1%) and Irish-owned companies by 1,841 (1.5%) in 2000 (Chart 6).
- ▶ Permanent full-time employment in internationally traded/financial services sectors continued to grow strongly, increasing by 11,769 jobs (23.3%) from 50,477 to 62,246 permanent full-time jobs in 2000 (Chart 3). Financial services permanent full-time employment (IFSC approved companies) rose to 8,417 and accounted for 13.5% of the Internationally traded services total employment in 2000, which represents an increase of 58.8% of its share of this sector's employment since 1991 (8.5%) (Chart 7).
- ▶ Overall part-time, temporary and short-term contract employment declined marginally by 253 jobs (-0.8%) in 2000 (Chart 2).
  - In 2000, part-time, temporary and short-term contract employment **increased** by 415 jobs in Irish-owned companies, a rise of 2.5%, compared with a **decline** of 668 jobs or 3.9% in foreign-owned companies (Chart 2).
  - Manufacturing companies in this category reduced employment by -381 (-1.5%) from 25,596 in 1999 to 25,215 in 2000. Employment in this category in Internationally-Traded and Financial Services companies declined marginally by -16 jobs (-0.3%) in 2000 (Chart 4). Part-time, temporary and short-term contract employment in other activities supported by the agencies increased by 144 jobs.
- ▶ The level of permanent full-time Job Gains<sup>2</sup> (new job creation) of 44,035 in 2000 was the highest recorded. Levels of job losses at 21,127 represent a marginal decline of 414 (1.9%) on the level of losses recorded in 1999 (Chart 8). Job Losses increased by 803 (7.5%) in 2000 in Irish-owned companies, but declined by -1,217 (-11.2%) in foreign-owned firms (Charts 9/10).

<sup>2</sup> Job Gains are the sum of the increase of employment for companies showing employment growth over the year. Appendix 5 outlines all definitions.

On a regional basis, each region with the exception of the Midlands Region recorded a positive net change in permanent full-time employment in 2000. (A regional analysis covering the period 1991-2000 is contained in Section 3 (Charts 12/13) and in Appendices 1 and 2). The South West recorded the highest increase (+14.0%) and accounted for 24.9% of all net new jobs created in 2000. Dublin had the second highest increase (+11.5%) but accounted for 46.7% of all net new jobs created in 2000.

- Firms in the BMW region recorded an increase in net permanent jobs of 2,431 (+3.3%) in 2000, compared to a net loss of -382 in 1999.

On a sectoral level, Internationally Traded/Financial Services and Metals & Engineering (which includes Electronics) accounted for 91% of the net change in permanent full-time employment of 22,908 in 2000. The percentage was very similar for both Irish-owned (87%) and foreign owned firms (92.5%).

- Internationally Traded/Financial Services recorded a positive net change of 11,769, or 51.3% of the total net change, although the sector employed only 20.0% of the workforce in 2000.
- Metals & Engineering recorded a positive net change of 9,043, or 39.5% of the total net change, and employed 35.2% of the workforce in 2000.

(A sectoral analysis covering the period 1991-2000 is contained in Section 4: Charts 15/16 and in Appendices 3 and 4).

## 1.2 MAIN FINDINGS FOR THE TEN YEAR PERIOD 1991-2000

Overall, permanent full-time employment in manufacturing, internationally traded and financial services and other activities increased by 100,896 (46.9%) over the ten year period 1991-2000 (Chart 1).

- Employment in foreign-owned companies grew by 66,493 jobs, a rise of 68.4% over the ten year period.
- Employment in Irish-owned<sup>3</sup> companies grew by 34,403 jobs, a rise of 29.2% over the ten year period.

Permanent full-time manufacturing employment in 2000 was 49,398 (24.7%) higher than 1991 (Chart 3). This compares with significant falls in other countries (Chart 11). Irish-owned companies increased manufacturing employment by 16,864 jobs (15.2%), while employment in foreign-owned companies rose by 32,534 jobs (36.5%) over the ten year period 1991-2000 (Chart 6).

Permanent full-time employment in internationally traded and financial services increased by 50,246 jobs (418.7%) over the ten year period. This accounted for 50.4% of the rise in total employment in manufacturing and internationally traded and financial services of 99,644 over the ten year period 1991-2000 (Chart 3). The IFSC component accounted for 8,417 jobs (13.5%) of the internationally traded and financial services total, which represents an increase of 58.8% of its share of this sector's employment since 1991 (8.5%) (Chart 7).

<sup>3</sup> Irish-owned defined as companies with 50% plus Irish-owned shareholding.

# APPENDIX 2

## Regional Trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1991-2000)

All Ownership (Irish/Foreign Component)

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

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

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	32,992	32,367	32,357	32,265	33,567	35,263	38,133	40,112	43,010	46,404
Mid East	9,030	8,995	9,433	9,769	10,139	10,828	11,429	11,554	12,311	12,849
Mid West	9,527	9,492	9,388	9,597	10,017	10,426	10,565	11,057	11,521	11,517
South West	17,590	17,642	17,917	17,967	18,465	18,886	19,544	20,185	20,627	22,805
South East	15,942	15,823	15,249	15,464	15,333	15,909	16,182	16,424	17,091	17,378
West	9,231	9,759	9,805	10,371	10,586	11,179	11,842	12,643	13,056	13,752
Midlands	5,065	5,095	5,041	5,360	5,739	5,960	6,432	6,861	7,135	7,002
Border	18,521	18,415	18,204	18,559	19,018	19,344	19,683	20,533	20,842	20,594
<b>Overall Total</b>	<b>117,898</b>	<b>117,588</b>	<b>117,394</b>	<b>119,352</b>	<b>122,864</b>	<b>127,795</b>	<b>133,810</b>	<b>139,369</b>	<b>145,593</b>	<b>152,301</b>

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

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	1,683	1,704	2,006	2,338	2,854	3,053	3,688	4,269	4,940	4,766
Mid East	807	849	990	1,057	1,228	1,183	1,429	1,668	1,660	1,521
South West	1,704	1,644	2,042	2,238	2,529	2,670	2,418	2,458	2,320	2,837
South East	1,499	1,302	1,542	2,017	1,935	1,808	1,696	1,556	2,004	1,914
West	924	990	1,192	1,232	1,542	1,672	2,019	1,902	2,013	2,163
Midlands	268	394	482	651	566	457	409	553	661	589
Border	1,347	1,740	2,339	2,482	2,584	2,771	2,628	2,561	2,820	3,043
<b>Overall Total</b>	<b>8,232</b>	<b>8,623</b>	<b>10,593</b>	<b>12,015</b>	<b>13,238</b>	<b>13,614</b>	<b>14,287</b>	<b>14,967</b>	<b>16,418</b>	<b>16,833</b>

# APPENDIX 1

## Regional trends in Permanent Full-Time Employment and Part-Time, Temporary/Short-Term Contract Employment (1991-2000)

All Ownership (Irish/Foreign Component)

IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

**Table 3** *Trends in Permanent Full-Time Employment*

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Dublin	59,142	58,774	64,312	76,844	93,239	103,936	10,697	11.5	75.7
Mid East	14,714	16,388	19,502	24,480	25,823	27,940	2,117	8.2	89.9
Mid West	22,696	23,045	25,370	27,516	31,471	32,985	1,514	4.8	45.3
South West	32,094	33,410	34,469	36,761	40,809	46,523	5,714	14.0	45.0
South East	26,082	25,143	25,461	27,581	28,489	28,924	435	1.5	10.9
West	19,032	18,801	21,037	24,267	26,609	29,175	2,566	9.6	53.3
Midlands	10,921	10,881	11,649	12,569	12,841	12,615	-226	-1.8	15.5
Border	30,382	30,951	33,375	33,524	33,770	33,861	91	0.3	11.5
<b>All Regions</b>	<b>215,063</b>	<b>217,393</b>	<b>235,175</b>	<b>263,542</b>	<b>293,051</b>	<b>315,959</b>	<b>22,908</b>	<b>7.8</b>	<b>46.9</b>

**Table 4** *Trends in Part-time, Temporary and Short-Term Contract Employment*

	1991	1993	1995	1997	1999	2000	Change 99-00	% Change 99-00	% Change 91-00
Dublin	3,257	4,009	5,924	7,958	11,160	10,282	-878	-7.9	215.7
Mid East	1,085	1,571	3,185	2,306	2,634	2,542	-92	-3.5	134.3
Mid West	50	616	1,658	1,379	899	263	-636	-70.7	426.0
South West	3,322	4,106	5,839	5,509	5,583	6,171	588	10.5	85.8
South East	1,873	2,171	2,947	3,870	3,627	3,907	280	7.7	108.6
West	1,340	1,454	2,495	3,630	4,556	4,555	-1	0.0	239.9
Midlands	495	865	1,086	976	1,259	1,611	352	28.0	225.5
Border	1,892	3,029	3,378	4,180	3,952	4,086	134	3.4	116.0
<b>All Regions</b>	<b>13,314</b>	<b>17,821</b>	<b>26,512</b>	<b>29,808</b>	<b>33,670</b>	<b>33,417</b>	<b>-253</b>	<b>-0.8</b>	<b>151.0</b>

▶ A regional analysis shows that net permanent full-time employment in the Southern and Eastern Region increased by 55.3% in the period 1991-2000, while growth in the BMW region was less than half that, at 25.4%. Growth in net permanent full-time employment in Irish-owned companies in the BMW region over the period 1991-2000 (+26%) was very similar to the growth recorded nationally for Irish-owned firms (+29.2%). However, in the case of foreign owned firms, growth in the BMW region in the period 1991-2000 amounted to 24.7% compared with growth nationally of 68.4% (Charts 12/13, Appendices 1 and 2).

- In contrast, growth in part-time, temporary and short-term contract employment in the BMW region in the period 1991-2000 amounted to 175%, compared with growth nationally in this form of employment of 151%, although coming from a low base (Chart 2, Appendices 1 and 2).

▶ In terms of the BMW region itself, growth in net permanent full-time employment is unevenly spread. The West region recorded a rate of growth of 53.3% over the period 1991-2000, the third highest in the country overall. In contrast, the Border region recorded a growth rate of only 11.5% over this period, while growth in the Midlands was only marginally higher at 15.5%. An analysis of the figures for the BMW region over the period 1991-2000 shows that Irish-owned companies created net permanent full-time jobs of 8,531 (West 53%, Border 24%, Midlands 23%), while foreign owned firms created net jobs of 6,785 (West 83%, Border 21%, Midlands -4%).

▶ Overall net change in permanent full-time employment declined from 391 in 1991 to the lowest level recorded over the ten years of 102 in 1992. An improvement was recorded in 1993 and in subsequent years net change improved dramatically to reach a level of 22,908 in 2000, the highest recorded over the period. The level of 22,908 recorded in 2000 represents an increase of 54.6% on the net change position in 1999, the highest percentage ever recorded. This results from a combination of a significant increase (+21%) in new jobs created in 2000, and a reduction in jobs lost (Chart 8).

- Over the ten year period 1991-2000, net change in Irish-owned industry improved from a net job loss of -845 in 1991 to a positive 6,708 in 2000, the highest net change recorded over the period. With the exception of one year 1998, the net change position displayed a continuing improvement each year between 1994 and 2000 (Chart 9).
- Net change in foreign-owned companies declined to 412 in 1992. Over the years 1993 to 1997, net change rose each year to reach 9,926 in 1997. Over the following two years 1998/1999, net change declined (-13.5%) to a level of 8,590 in 1999, due basically to the rise in the level of job losses (+74.5%) in these two years. In 2000, the net change position rose dramatically to reach 16,200, 88.6% above the 1999 level. This is due to the combination of a significant increase (+32.9%) in new job creation and a reduction (-11.2%) in job losses (Chart 10).

▶ Overall gross job gains (new job creation) for the ten year period have shown a rise of 25,027 (131.7%). Job gains (Permanent full-time employees) in 2000 of 44,035 are the highest recorded since 1979 (Chart 8).

- Gross job gains of 18,224 in 2000 are the highest recorded by Irish-owned companies to date (Chart 9). Over the ten year period, gross job gains increased by 7,415 (68.6%).
- Foreign-owned companies achieved a level of 25,811 gross job gains in 2000, the highest level recorded (Chart 10). Gross job gains over the ten year period 1991-2000 increased by 17,612 (214.8%).

▶ The level of job losses increased by 13.5% over the ten year period to reach 21,127 in 2000. Job losses declined marginally (-1.9%) in 2000 (Chart 8).

- Job losses in Irish-owned companies declined marginally (-1.2%) over the ten year period 1991-2000. Job losses rose by 803 (7.5%) in 2000 (Chart 9).
- Job losses in foreign-owned companies rose from 6,963 in 1991 to 9,611 (+38.0%) in 2000. Job losses declined substantially by 1,217 (11.2%) in 2000 (Chart 10).

▶ Part-time, temporary and short-term contract employment in IDA Ireland, Enterprise Ireland and Údarás na Gaeltachta companies rose by 20,103 (150.9%) over the ten year period 1991-2000. This is more than 3 times the rate of growth in permanent full-time employment over the same period, although coming from a far lower base. However, a marginal decline was recorded in this category in 2000 of 0.8%. A decline also occurred in 1996 which was mainly attributable to employees in this category moving into permanent employment in a number of companies in the foreign-owned electronics sector. In 2000, there is evidence of temporary workers being made permanent in a number of companies (Irish and foreign-owned), possibly in response to the tightening labour/skills market (Chart 2).

- Manufacturing companies increased temporary forms of employment by 13,574 (116.6%) from 11,641 in 1991 to 25,215 jobs in 2000 (Chart 4).
- Temporary forms of employment in internationally traded and financial services increased from 896 in 1991 to reach 6,147 in 2000, a rise of 586.0% over the ten year period 1991-2000 (Chart 4).
- Temporary forms of employment in Irish-owned companies increased by 8,601 jobs (104.5%) from 8,232 in 1991 to 16,833 in 2000. In foreign-owned companies, the increase amounted to 11,502 (226.5%) from 5,082 in 1991 to 16,584 in 2000 (Chart 2).

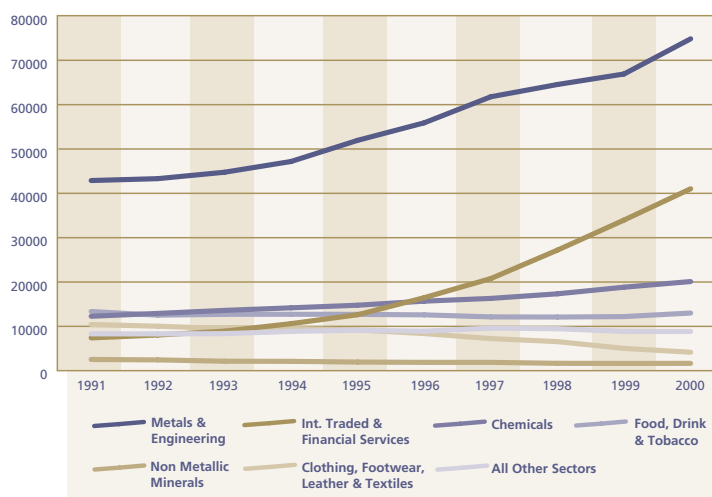
▶ Part-time, temporary and short-term contract employment as a percentage of overall employment (permanent plus temporary) in IDA Ireland, Enterprise Ireland and Údarás na Gaeltachta companies has increased from 6.3% of all jobs in 1991 to 10.2% in 2000 (Chart 5).

- Out of a total 33,417 employed in part-time, temporary and short-term contract employment in 2000, 6,147 (18.4%) were employed in internationally traded and financial services, up from 896 (6.7%) in 1991 (Chart 4).

- ▶ The Internationally Traded and Financial Services sector has been the fastest growing sector over the ten year period (454.6% or 33,629 jobs). Permanent full-time employment in this sector rose by 20.8% or 7,054 jobs in 2000, and accounted for 43.5% of the net jobs created by foreign owned firms in 2000. This sector accounted for 25% of total employment in foreign companies (41,027 jobs) in 2000.
- ▶ The Pharmaceuticals/Chemicals sector now accounts for 12.3% of total foreign-owned permanent full-time employment. This represents an increase of 6.8% on 1999, and a rise of 63.8% or 7,836 jobs over the ten year period as a whole.
- ▶ Employment in the Food, Drink & Tobacco sector grew by 6.6% (803 jobs) in 2000. Over the ten year period 1991-2000, as a whole, employment declined by 2.6% (349 jobs).
- ▶ Permanent full-time employment in the Clothing, Textiles, Footwear/Leather sector declined by 60.0% over the ten year period 1991-2000. Declines occurred in each year over the period with a year on year decrease occurring in 2000 of 17.2%. This process has been accelerating in recent years with employment decreasing by 50% since 1996. The highest year on year decrease occurred in 1999 (23.3%).



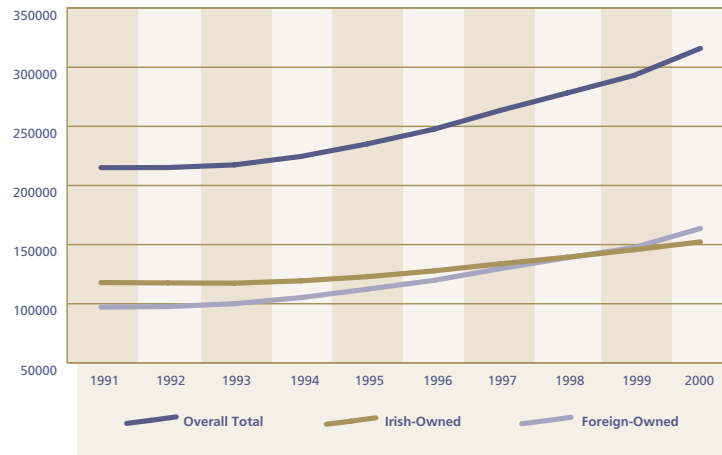
**Chart 16** Sectoral Trends in Permanent Full-time Foreign-Owned Employment Manufacturing and Internationally Traded and Financial Services Employment (1991-2000)  
 IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta



Sectors	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Metals & Engineering	42,884	43,311	44,754	47,178	51,948	55,901	61,778	64,542	66,915	74,846
Int Traded & Fin Services	7,398	8,049	8,916	10,610	12,617	16,468	20,780	27,192	33,973	41,027
Chemicals	12,273	12,919	13,604	14,177	14,768	15,683	16,306	17,339	18,831	20,109
Food, Drink & Tobacco	13,355	12,523	12,715	12,729	12,707	12,594	12,135	12,103	12,203	13,006
Non-Metallic Minerals	2,535	2,439	2,138	2,112	1,950	1,881	1,879	1,665	1,641	1,655
Clothing, Textiles, Footwear/Leather	10,413	10,033	9,513	9,511	9,192	8,371	7,243	6,559	5,032	4,167
Other Sectors	8,309	8,305	8,361	8,869	9,131	8,910	9,611	9,468	8,863	8,848
Overall Total	97,167	97,579	100,001	105,186	112,313	119,808	129,732	138,868	147,458	163,658

- ▶ Total permanent full-time employment in foreign-owned companies stood at 163,658 in 2000, a rise of 11.0% on 1999, and 68.4% higher than 1991.
- ▶ Employment in the Metals & Engineering sector (which includes Electronics), the highest employing sector, accounts for 45.7% of total employment in foreign-owned companies (74,846 jobs) and this represents an increase of 11.9% on 1999 and a 74.5% growth (31,962 jobs) over the ten year period as a whole. This sector accounted for 49% of the net jobs created by foreign owned firms in 2000.

**Chart 1** Trends in Permanent Full-Time Employment 1991-2000  
 Overall Irish and Foreign Components  
 IDA Ireland, Enterprise Ireland<sup>4</sup>, Shannon Development & Údarás na  
 Gaeltachta

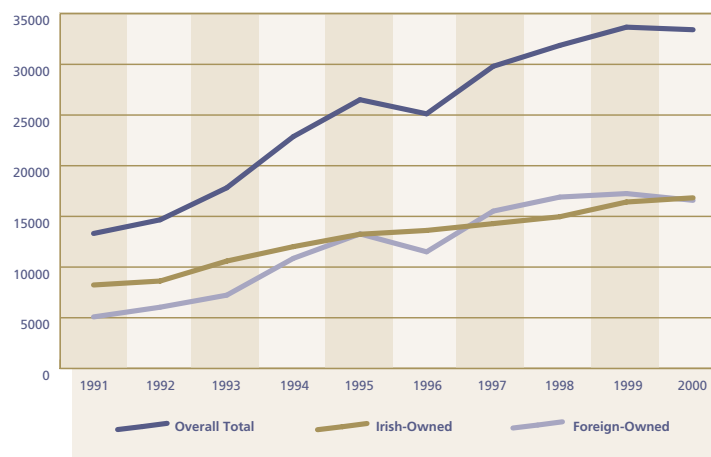


	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	215,063	215,165	217,393	224,536	235,175	247,601	263,542	278,237	293,051	315,959
Irish-Owned	117,898	117,588	117,394	119,352	122,864	127,795	133,810	139,369	145,593	152,301
Foreign-Owned	97,165	97,577	99,999	105,184	112,311	119,806	129,732	138,868	147,458	163,658

- ▶ Overall permanent full-time employment (i.e. for manufacturing, internationally traded and financial services and other activities supported by the agencies) increased by 100,896 (46.9%) over the ten year period 1991-2000. In 2000, total permanent full-time employment amounted to 315,959, an increase of 22,908 (7.8%) over 1999.
- ▶ Foreign-owned companies accounted for 16,200 (70.7%) of the net employment increase in 2000, with Irish-owned companies contributing 6,708 (29.3%).
- ▶ Over the past ten years, permanent full-time employment in foreign-owned companies grew by 66,493 (68.4%) with employment in Irish-owned companies increasing by 34,403 (29.2%).
- ▶ Permanent full-time employment in foreign-owned companies now accounts for 51.8% of total employment in manufacturing, internationally traded and financial services and other activities supported by the agencies compared with 50.3% in 1999 and 45.2% in 1991.

<sup>4</sup> Former Client companies under the remit of Forbairt.

**Chart 2** *Trends in Part-Time, Temporary and Short-Term Contract Employment 1991-2000*  
*Overall Irish and Foreign Components*  
*IDA Ireland, Enterprise Ireland & Údarás na Gaeltachta*



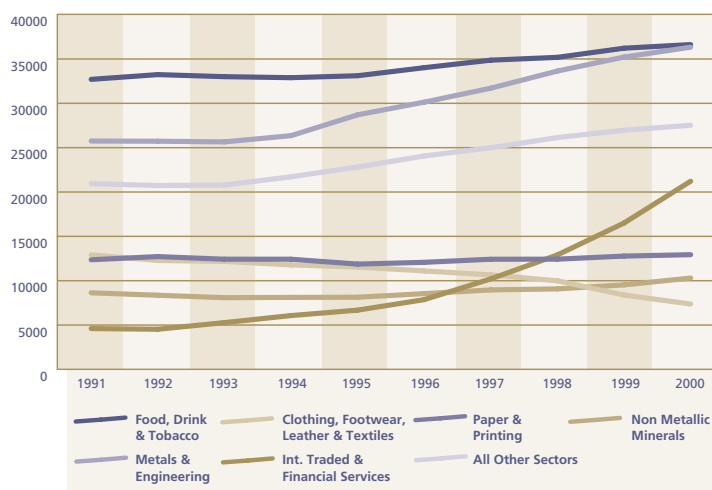
	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	13,314	14,663	17,821	22,876	26,512	25,119	29,808	31,873	33,670	33,417
Irish-Owned	8,232	8,623	10,593	12,015	13,238	13,614	14,287	14,967	16,418	16,833
Foreign-Owned	5,082	6,040	7,228	10,861	13,274	11,505	15,521	16,906	17,252	16,584

- ▶ Part-time, temporary and short-term contract employment rose by 151% over the ten year period 1991-2000. Employment in these categories declined marginally in 2000 by 0.8%. The only other year in which a decline in this form of employment occurred was 1996 (-5.3%). The decline in 1996 was mainly attributable to employees in this category moving into permanent employment in a number of companies in the foreign-owned electronics sector. In 2000, there is evidence of temporary workers being made permanent in a number of companies (Irish and foreign-owned), possibly as a response to the tightening labour/skills market.
- ▶ Employment in this category in Irish-owned companies grew by 8,601 (104.5%) over the 1991-2000 period, showing an increase in each year to reach 16,833 jobs in 2000. An increase of 415 jobs (2.5%) was recorded in 2000.
- ▶ Employment in this category in foreign-owned companies grew by 226.3% (11,502 jobs) over the ten year period 1991-2000. A decline occurred in 2000 (-3.9%). This follows an increase of 2.0% in 1999 and 8.9% in 1998.

- ▶ The Food, Drink & Tobacco sector now accounts for 24.0% of total permanent employment in Irish-owned companies. This is the highest employing sector. However, this sector contributed just 6.1% of the total net increase in employment in Irish owned companies in 2000.
- ▶ Metals & Engineering now accounts for 23.9% of total Irish-owned permanent employment but contributed 16.6% of the net increase in permanent full-time employment in Irish-owned companies in 2000. This sector's employment grew by 41.1% (10,580 jobs) since 1991.
- ▶ Permanent full-time employment in the Paper & Printing sector grew by only 4.7% over the ten year period 1991-2000.
- ▶ Non-Metallic Minerals grew by 19.3% over the ten year period 1991-2000. The increase in 2000 was 8.0% (767 jobs).
- ▶ The Clothing, Textiles, Footwear/Leather sector suffered a major decline in permanent full-time employment over the ten year period, decreasing by 42.9% (5,544 jobs). In 2000 alone, this sector's employment level declined by 12.1% (1,014 jobs).

## 4 SECTORAL TRENDS (1991-2000)

**Chart 15** *Sectoral Trends in Permanent Full-Time Irish-Owned Employment Manufacturing and Internationally Traded and Financial Services Employment (1991-2000)*  
 IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

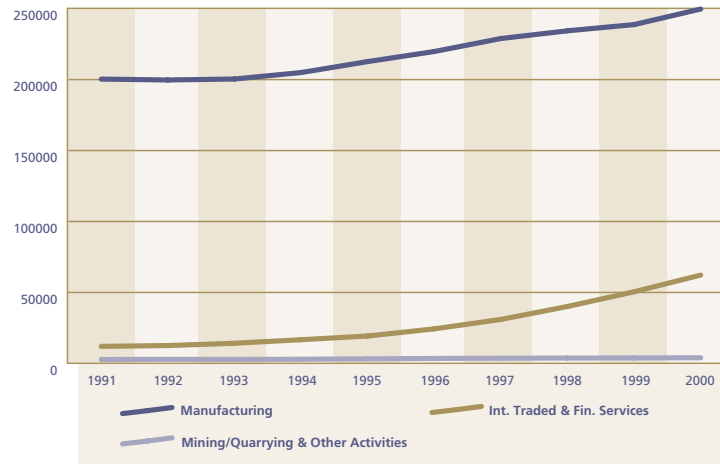


Sectors	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Food, Drink & Tobacco	32,702	33,239	33,007	32,891	33,111	34,019	34,868	35,186	36,217	36,624
Clothing, Footwear, Leather and Textiles	12,914	12,279	12,171	11,781	11,539	11,100	10,654	9,987	8,384	7,370
Paper & Printing	12,358	12,721	12,424	12,423	11,874	12,072	12,420	12,428	12,776	12,934
Non-Metallic Minerals	8,634	8,360	8,086	8,119	8,137	8,540	8,962	9,076	9,530	10,297
Metals & Engineering	25,749	25,728	25,650	26,353	28,704	30,132	31,711	33,641	35,217	36,329
Int Traded & Financial Services	4,602	4,525	5,275	6,067	6,680	7,866	10,205	12,908	16,504	21,219
Other Sectors	20,939	20,736	20,781	21,718	22,819	24,066	24,990	26,143	26,965	27,528
<b>Overall Total</b>	<b>117,898</b>	<b>117,588</b>	<b>117,394</b>	<b>119,352</b>	<b>122,864</b>	<b>127,795</b>	<b>133,810</b>	<b>139,369</b>	<b>145,593</b>	<b>152,301</b>

Total permanent full-time employment in Irish-owned companies stood at 152,301 in 2000, a rise of 4.6% on 1999, and 29.2% higher than in 1991.

- Internationally Traded and Financial Services has been the fastest growing sector over the 10 year period (an increase of 361.1% or 16,617 jobs). Permanent full-time employment in this sector rose by 28.6% or 4,715 jobs in 2000. This sector employed 14% of the permanent full-time workforce in Irish-owned industry in 2000, but created 70.3% of the net increase in employment last year.

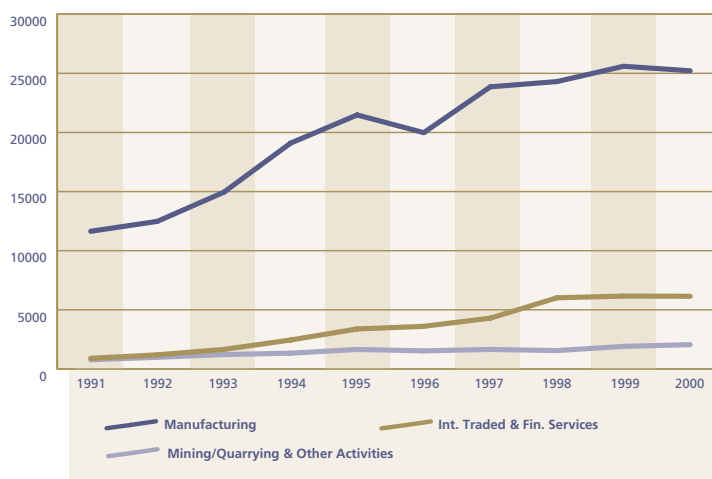
**Chart 3** Trends in Permanent Full-Time Employment 1991-2000  
 Manufacturing/Internationally Traded and Financial Services/Other  
 Activities  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na  
 Gaeltachta



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	215,063	215,165	217,393	224,536	235,175	247,601	263,542	278,237	293,051	315,959
Manufacturing	200,339	199,728	200,408	204,949	212,691	219,789	228,941	234,379	238,759	249,737
Int. Traded & Fin. Services	12,000	12,574	14,191	16,677	19,297	24,334	30,985	40,100	50,477	62,246
Mining/Quarrying and Other Services	2,724	2,863	2,794	2,910	3,187	3,478	3,616	3,758	3,815	3,976

- ▶ Over the ten year period 1991-2000, permanent full-time manufacturing employment has risen from 200,339 in 1991 to 249,737 in 2000, an increase of 49,398 jobs (24.7%). In 2000, there was an increase of 10,978 jobs (4.6%) the highest recorded over the past ten years. Some 9,137 of this increase (83%) was recorded by foreign-owned manufacturing companies (Chart 6).
- ▶ Permanent full-time employment in internationally traded and financial services companies displayed consistent growth from 12,000 in 1991 to 62,246 in 2000, a rise of 418.7%. This accounted for 50,246 (50.4%) of the rise in total employment in manufacturing and internationally traded and financial services companies of 99,644 over the ten years. The increase in internationally traded and financial services employment was 11,769 (23.3%) in 2000, and accounted for 51.4% of the rise in total employment of 22,908 in 2000.

**Chart 4** *Trends in Part-Time, Temporary and Short-Term Contract Employment 1991-2000*  
*Manufacturing/Internationally Traded and Financial Services/Other Activities*  
*IDA Ireland, Enterprise Ireland & Údarás na Gaeltachta*

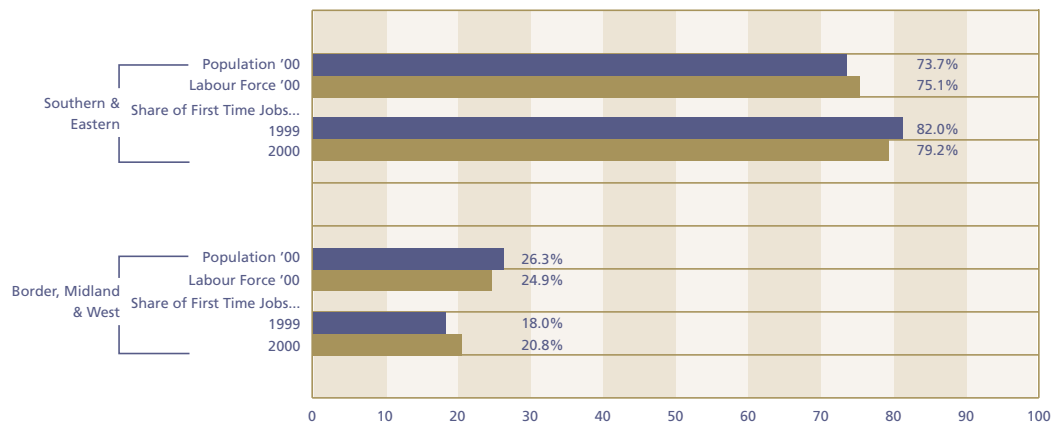


	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	13,314	14,663	17,821	22,876	26,512	25,119	29,808	31,873	33,670	33,417
Manufacturing	11,641	12,482	14,950	19,095	21,481	19,983	23,861	24,303	25,596	25,215
Int. Traded & Fin. Services	896	1,195	1,654	2,448	3,382	3,605	4,297	6,017	6,163	6,147
Mining/Quarrying & Other Services	777	986	1,217	1,333	1,649	1,531	1,650	1,553	1,911	2,055

- ▶ Part-time, temporary and short-term contract employment in manufacturing grew by 116.6% (13,574 jobs) over the 1991-2000 period. Employment in this category peaked in 1999 at 25,596 jobs and in the following year (2000) declined marginally by 1.5% to 25,215 jobs.
- ▶ Employment in this category in internationally traded and financial services grew by 586.0% (5,251 jobs) over the period 1991-2000 to 6,147 jobs in 2000. In line with the decline recorded in manufacturing, a marginal decline was also recorded in 2000 (-0.3%) in this category of employment in internationally traded and financial services, the only year in which a decrease was recorded over the period.

*Excludes Shannon Development*

**Chart 14** *Share of Job Gains in Agency Supported Companies by Region 1996/2000 Relative to Share of Population and Labour Force*



*Includes employment in all agencies (IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta).*

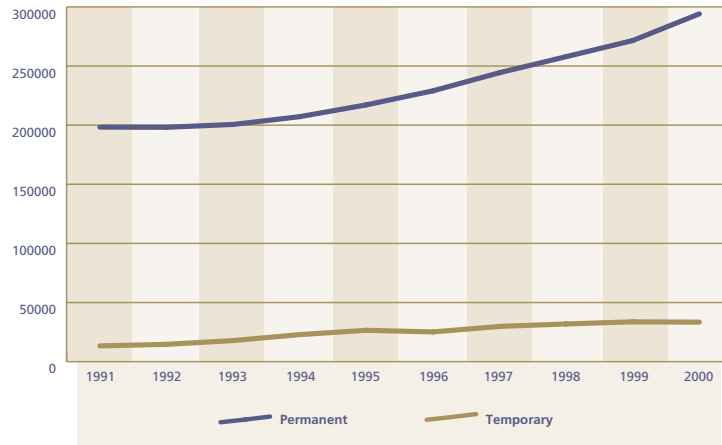
Chart 14 shows the distribution of job gains created in agency supported companies between the Southern and Eastern Region (Objective 1 in Transition) and the Border, Midlands and West (BMW).

- ▶ Mirroring the distribution of the population, the labour force and larger urban centres generally, most of the "job gains" created in agency-assisted companies during the late 1990's have been located in the Southern and Eastern region.
- ▶ Over the period 1991-2000 the percentage of total gross job gains created in the BMW region has fallen, from a high of 30% in 1992 to a low of 18% in 1999. However, the position improved significantly in 2000 with the percentage of gross job gains arising in the BMW regions increasing from 18.0% to 20.8% of the total, a 16% increase. 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.



- ▶ The **Mid East** region recorded a substantial increase in employment of 165.5% over the period 1991-2000 and had the fourth highest increase in 2000 (11.8%).
- ▶ Employment in the **Mid West** region increased by 7.6% in 2000 and recorded an increase of 63% over the period 1991-2000 as a whole.
- ▶ The **South East** region recorded an increase of 1.3% in 2000 and grew by 13.9% over the 1991-2000 period as a whole.
- ▶ Permanent full-time employment in foreign-owned companies in the **Border, Midlands and West** regions increased by 6.6% in 2000, the largest increase recorded over the past ten years. Overall these regions recorded an increase of 24.7% over the period 1991-2000. The increase recorded for all regions of Ireland over the same period was 68.4%.
- ▶ Employment in the **West** region increased by 13.8% in 2000, the third highest regional increase in that year. Over the ten year period 1991-2000, this region recorded an increase in employment of 57.4%.
- ▶ The **Midlands** region recorded a decline of 1.6% in 2000 and an overall decline of 4.2% over the 1991-2000 period as a whole. The Midlands was the only region to show a decline in permanent full-time employment in 2000.
- ▶ The **Border** region recorded an increase of 2.6% in 2000, while a rate of growth of 11.8% was achieved over the ten year period 1991-2000 as a whole.

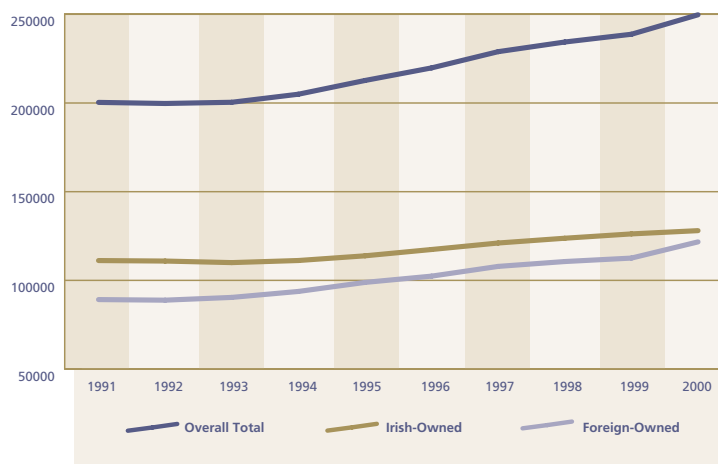
**Chart 5** Trends in Permanent Full-Time and Part-Time, Temporary and Short-Term Contract Employment 1991-2000  
 Manufacturing/Internationally Traded and Financial Services/Other Activities  
 IDA Ireland, Enterprise Ireland & Údarás na Gaeltachta



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Permanent Jobs	198,334	198,211	200,579	207,182	217,155	229,026	244,359	257,916	271,559	294,150
Other Jobs	13,314	14,663	17,821	22,876	26,512	25,119	29,808	31,873	33,670	33,417
Overall Total	211,648	212,874	218,400	230,058	243,667	254,145	274,167	289,789	305,229	327,567

- ▶ The share of total employment accounted for by part-time, temporary and short-term contract employment (excluding Shannon Development who do not currently record this form of employment) has increased steadily during the 1990's (from 6.3% of all jobs in 1991 to 10.2% in 2000).

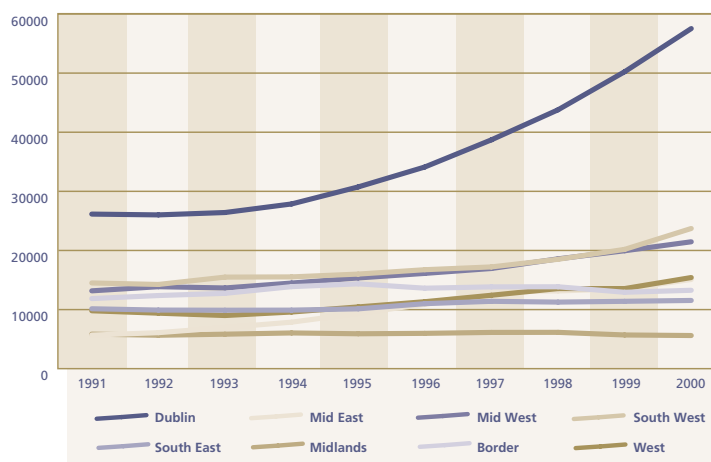
**Chart 6** *Trends in Permanent Full-Time Manufacturing Employment 1991-2000*  
*Overall/Irish/Foreign-Owned Components*  
*IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta*



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	200,339	199,728	200,408	204,949	212,691	219,789	228,941	234,379	238,759	249,737
Irish-Owned	111,172	110,890	110,013	111,196	113,840	117,402	121,064	123,759	126,195	128,036
Foreign-Owned	89,167	88,838	90,395	93,753	98,851	102,387	107,877	110,620	112,564	121,701

- ▶ Permanent full-time employment in manufacturing increased by 10,978 jobs (+4.6%) in 2000, the highest increase recorded over the past ten years. Over the ten year period 1991-2000 employment increased by 24.7%, which compares with declines in manufacturing employment recorded by most major economies (Chart 11).
- ▶ Permanent full-time employment in Irish-owned manufacturing companies declined from 111,172 in 1991 to 110,013 in 1993 (-1.0%) before recovering over the following seven years to reach a peak of 128,036 (+16.4%) in 2000. The increase in 2000 was 1.5% (1,840 jobs). Employment in Irish-owned companies represented 51.3% of total permanent full-time employment in manufacturing in 2000, compared to 52.9% in 1999 and 55.5% in 1991.
- ▶ Employment in foreign-owned manufacturing companies increased by 9,137 jobs (+8.1%) in 2000, the highest increase recorded over the past ten years. Employment in foreign-owned manufacturing companies has displayed consistent growth since 1992 to reach a level of 121,701 in 2000. Over the past ten years, employment in foreign-owned manufacturing companies has increased by 32,534 (36.5%) and in 2000 represented 48.7% of permanent full-time employment in manufacturing, compared with 47.1% in 1999 and 44.5% in 1991.

**Chart 13** *Regional Trends in Foreign-Owned Permanent Full Time Employment Manufacturing/Internationally Traded and Financial Services/Other Activities*  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	26,150	26,016	26,417	27,866	30,745	34,118	38,711	43,788	50,229	57,532
Mid East	5,684	6,096	6,955	7,874	9,363	10,887	13,051	13,158	13,512	15,091
Mid West	13,169	13,871	13,657	14,488	15,353	16,122	16,951	18,582	19,950	21,468
South West	14,504	14,249	15,493	15,529	16,004	16,745	17,217	18,509	20,182	23,718
South East	10,140	9,919	9,894	9,909	10,128	11,001	11,399	11,266	11,398	11,546
Midlands	5,856	5,658	5,840	6,049	5,910	5,980	6,137	6,151	5,706	5,613
Border	11,861	12,376	12,747	13,880	14,357	13,620	13,841	13,860	12,928	13,267
West	9,801	9,392	8,996	9,589	10,451	11,333	12,425	13,554	13,553	15,423
<b>All Regions</b>	<b>97,165</b>	<b>97,577</b>	<b>99,999</b>	<b>105,184</b>	<b>112,311</b>	<b>119,806</b>	<b>129,732</b>	<b>138,868</b>	<b>147,458</b>	<b>163,658</b>

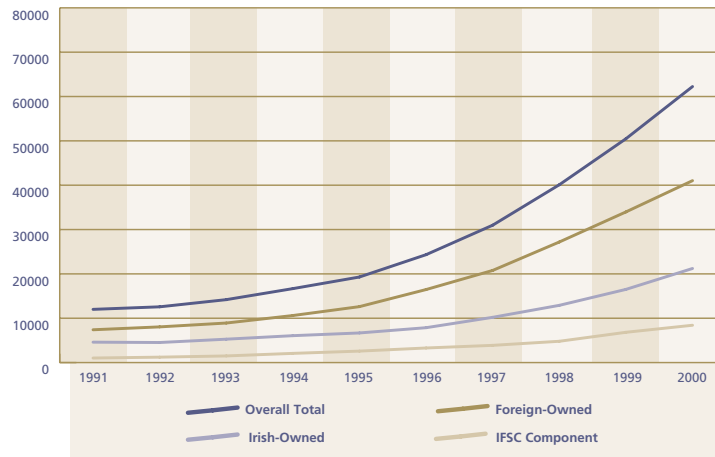
- ▶ On a regional basis, permanent full-time employment in foreign-owned companies in the **Southern & Eastern Regions** reached a peak of 129,355 in 2000, an increase of 12.2% over 1999 and the highest recorded over the ten year period 1991-2000. Over the ten year period 1991-2000, permanent full-time employment in these regions increased by 59,708 (85.7%).
- ▶ As with Irish-owned industry, the **South West** region recorded the highest increase in 2000 (17.5%), while employment increased by 63.5% over the ten year period as a whole. This region now accounts for 14.5% of permanent full-time employment in foreign-owned companies marginally lower than the figure of 14.9% recorded in 1991.
- ▶ **Dublin** recorded the second highest increase in 2000 (14.5%), while employment more than doubled (+120%) over the ten year period as a whole. Dublin now accounts for 35.2% of permanent full-time employment in foreign-owned companies, up from 26.9% in 1991.

- **Dublin** recorded the second highest increase in 2000 (7.9%), while employment increased by 40.7% over the ten year period as a whole. Dublin now accounts for 30.5% of permanent full-time employment in Irish-owned companies, up marginally from 28% in 1991.
- The **Mid East** region recorded an increase of 42.3% over the period 1991-2000 and had the fourth highest increase in 2000 (4.4%).
- Employment in the **Mid West** region remained static in 2000 and recorded an increase of 20.9% over the period 1991-2000 as a whole.
- The **South East** region recorded an increase of 1.7% in 2000 and grew by 9.0% over the 1991-2000 period as a whole.

Permanent full-time employment in Irish-owned companies in the **Border, Midlands and West** regions increased each year since 1991. The increase in 2000 was 0.8%. Overall these regions recorded an increase of 26.0% over the period 1991-2000. The increase recorded for all regions in Ireland over the same period was 29.2%.

- Employment in the **West** region increased by 5.3% in 2000, the third highest regional increase in that year. Over the ten year period 1991-2000, this region recorded an increase in employment of 49.0%.
- The **Midlands** region recorded a decline of 1.9% in 2000 and a growth rate of 38.2% over the 1991-2000 period as a whole.
- The **Border** region recorded a decline of 1.2% in 2000, while a rate of growth of 11.2% was achieved over the ten year period 1991-2000 as a whole.

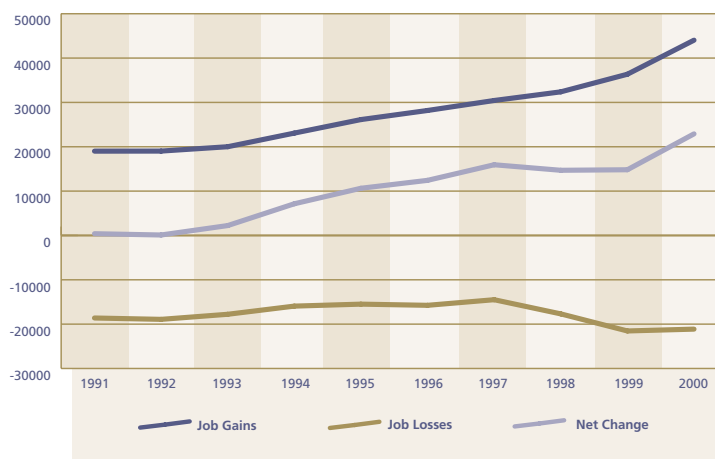
**Chart 7** Trends in Permanent Full-Time Internationally Traded and Financial Services Employment 1991-2000  
 Overall/Irish/Foreign-Owned Components  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Overall Total	12,000	12,574	14,191	16,677	19,297	24,334	30,985	40,100	50,477	62,246
Foreign-Owned	7,398	8,049	8,916	10,610	12,617	16,468	20,780	27,192	33,973	41,027
Irish-Owned	4,602	4,525	5,275	6,067	6,680	7,866	10,205	12,908	16,504	21,219
IFSC Component	1,024	1,222	1,497	2,075	2,586	3,289	3,884	4,803	6,828	8,417

- ▶ Permanent full-time employment in Irish-owned internationally traded and financial services companies increased by 16,617 (361.1%) from 4,602 in 1991 to 21,219 in 2000. In 2000, the increase was 4,715 (28.6%), the highest achieved over the past ten years.
- ▶ Permanent full-time employment in foreign-owned internationally traded and financial services companies increased by 33,629 (454.6%) over the ten year period. In 2000, the increase was 7,054 (20.8%), also the highest achieved over the past ten years.
- ▶ Permanent full-time employment in international financial services (IFSC approved companies) increased to 8,417 in 2000 and accounted for 13.5% of the internationally traded/financial services total, which represents a 58.8% increase of its share of this sector's employment since 1991 (8.5%). The international financial services increase in 2000 was 1,589 (23.3%).

**Chart 8** Trends in Permanent Full-Time Employment 1991-2000  
 Overall/Job Gains/Job Losses/Net Change  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta

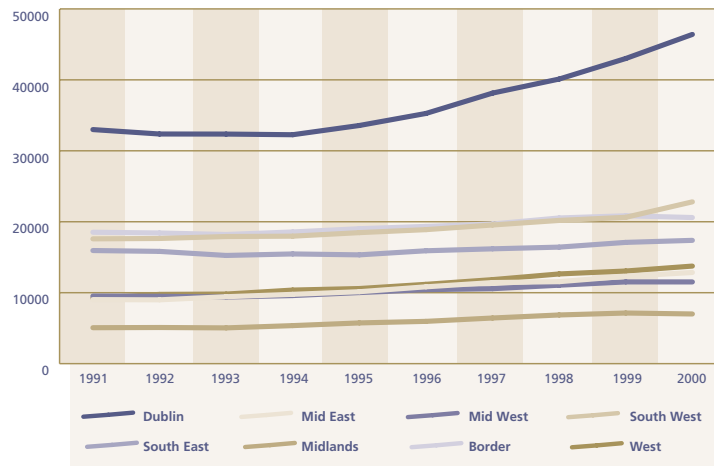


	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Job Gains	19,008	19,025	20,007	23,079	26,131	28,182	30,433	32,384	36,355	44,035
Job Losses	-18,617	-18,923	-17,779	-15,936	-15,492	-15,756	-14,492	-17,689	-21,541	-21,127
Net Change	391	102	2,228	7,143	10,639	12,426	15,941	14,695	14,814	22,908

- ▶ In 2000, 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 44,035. An increase of 21.1% (7,680) was recorded in 2000, the highest recorded over the past ten years. Over the ten year period 1991-2000 the level of job gains increased by 131.7% (25,027).
- ▶ The level of job losses increased by 13.5% over the ten year period to reach 21,127 in 2000. This represents a decrease of 1.9% on the level of job losses recorded in 1999 (the highest level recorded over the 10 year period).
- ▶ Overall net change declined from 391 in 1991 to the lowest level recorded over the ten years of 102 in 1992. An improvement was recorded in 1993 and in subsequent years net change improved dramatically to reach a level of 22,908 in 2000, the highest recorded over the period. The level of 22,908 recorded in 2000 represents an increase of 54.6% on the net change position in 1999. This results from the combination of a significant increase in new job creation (gross job gains) (+21.1%) in 2000, and a reduction in the level of job losses.

### 3 REGIONAL TRENDS

**Chart 12** *Regional Trends in Irish-Owned Permanent Full Time Employment Manufacturing/Internationally Traded and Financial Services/Other Activities*  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta



	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Dublin	32,992	32,367	32,357	32,265	33,567	35,263	38,133	40,112	43,010	46,404
Mid East	9,030	8,995	9,433	9,769	10,139	10,828	11,429	11,554	12,311	12,849
Mid West	9,527	9,492	9,388	9,597	10,017	10,426	10,565	11,057	11,521	11,517
South West	17,590	17,642	17,917	17,967	18,465	18,886	19,544	20,185	20,627	22,805
South East	15,942	15,823	15,249	15,464	15,333	15,909	16,182	16,424	17,091	17,378
Midlands	5,065	5,095	5,041	5,360	5,739	5,960	6,432	6,861	7,135	7,002
Border	18,521	18,415	18,204	18,559	19,018	19,344	19,683	20,533	20,842	20,594
West	9,231	9,759	9,805	10,371	10,586	11,179	11,842	12,643	13,056	13,752
<b>All Regions</b>	<b>117,898</b>	<b>117,588</b>	<b>117,394</b>	<b>119,352</b>	<b>122,864</b>	<b>127,795</b>	<b>133,810</b>	<b>139,369</b>	<b>145,593</b>	<b>152,301</b>

On a regional basis permanent full-time employment in Irish-owned companies in the **Southern and Eastern** regions reached a peak of 110,953 in 2000, an increase of 6.1% over 1999 and the highest recorded over the ten year period 1991-2000. Over the ten year period 1991-2000, permanent full-time employment in these regions increased by 25,872 (30.4%).

- The **South West** region recorded the highest increase in 2000 (10.6%), while employment increased by 29.6% over the ten year period as a whole. This region now accounts for 15.0% of permanent full-time employment in Irish-owned companies, similar to the position in 1991.



### **Japan**

Manufacturing employment in Japan declined by 9.3% between 1995 (when the OECD statistics were re-based) and the third quarter of 2000.

### **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 29.9% up to the third quarter of 2000. The rate of decline slowed to 6.8% between 1994 and 1999, and employment in manufacturing increased by 1% in 2000.

### **United Kingdom**

The decline in the UK continues a trend evident since the early 1980's. Between 1994 and 1998, this trend reversed. However, manufacturing employment continued to decline by 6.1% between 1998 and the third quarter of 2000.

### **Spain/Portugal**

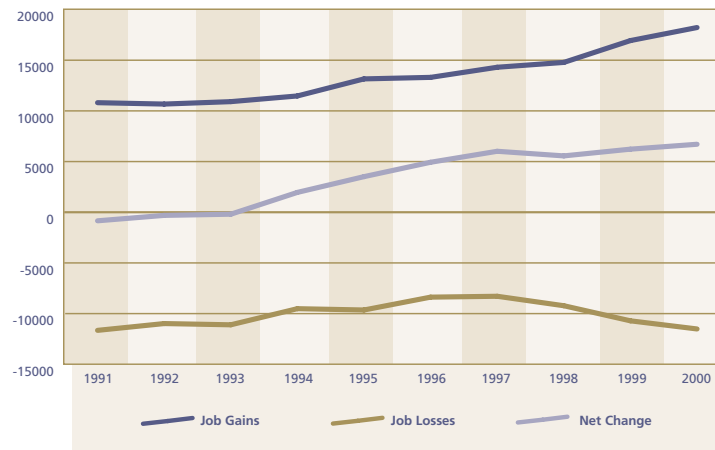
Industrial employment in Spain declined by 16.5% between 1989 and 1994. However, employment has increased by 21.8% since 1994.

Industrial employment in Portugal declined by 8.9% between 1995 (when the OECD statistics were re-based) and the third quarter of 2000. Previous OECD statistics showed that industrial employment in Portugal declined by 14.4% between 1989 and 1995.

### **Other**

Manufacturing employment in Norway declined by 9.1% between 1989 and the third quarter of 2000, while industrial employment in Sweden fell by 21.1% over this period.

**Chart 9** Trends in Permanent Full-Time Employment in Irish-Owned Firms 1991-2000  
 Manufacturing/Internationally Traded and Financial Services/Other Activities  
 Overall/Job Gains/Job Losses/Net Change  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta

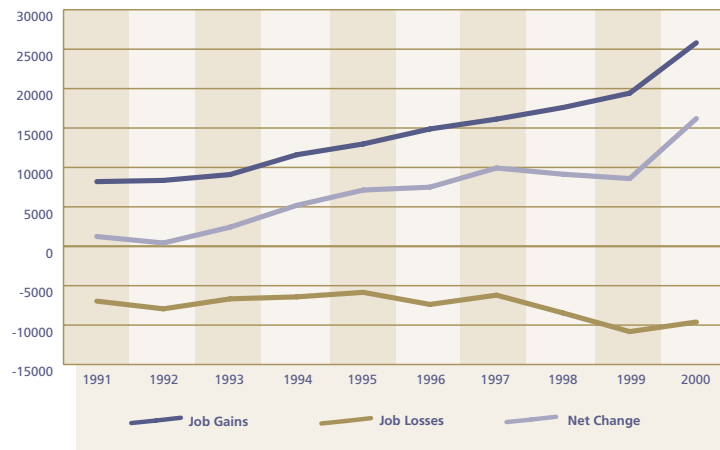


	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Job Gains	10,809	10,673	10,912	11,473	13,156	13,307	14,305	14,782	16,937	18,224
Job Losses	-11,654	-10,983	-11,106	-9,515	-9,644	-8,376	-8,290	-9,223	-10,713	-11,516
Net Change	-845	-310	-194	1,958	3,512	4,931	6,015	5,559	6,224	6,708

- ▶ Gross job gains increased by 7,415 (+68.6%) to a level of 18,224 over the period 1991-2000, and by 1,287 (7.6%) in 2000.
- ▶ In 2000, the level of job losses increased by 7.5% to 11,516, the highest level recorded since 1991 when job losses stood at 11,654. The rate of job losses (-8,290) in 1997 was the lowest level recorded to date. In 1998, job losses rose to 9,223 and increased further in the following two years (by 24.9%) to 11,516 in 2000. However, the level of job losses declined marginally by 1.2% over the ten year period 1991-2000 as a whole.
- ▶ Over the ten year period 1991-2000, net change in Irish-owned industry improved from a net job loss of -845 in 1991 to a positive 6,708 in 2000, the highest net change recorded over the period. The net change position improved from a negative in the years 1991-1993 to a positive 1,958 in 1994 and displayed a continuing improvement in each of the following six years to reach 6,708 in 2000, the highest recorded over the period.

Although the net change position has increased dramatically over the period 1994 to 2000, the increase in job losses is having a negative impact on this success, with job losses increasing by 21.0% over the 1994 to 2000 period.

**Chart 10** Trends in Permanent Full-Time Employment in Foreign-Owned Firms 1991-2000  
 Manufacturing/Internationally Traded and Financial Services/Other Activities  
 Overall/Job Gains/Job Losses/Net Change  
 IDA Ireland, Enterprise Ireland, Shannon Development & Údarás na Gaeltachta

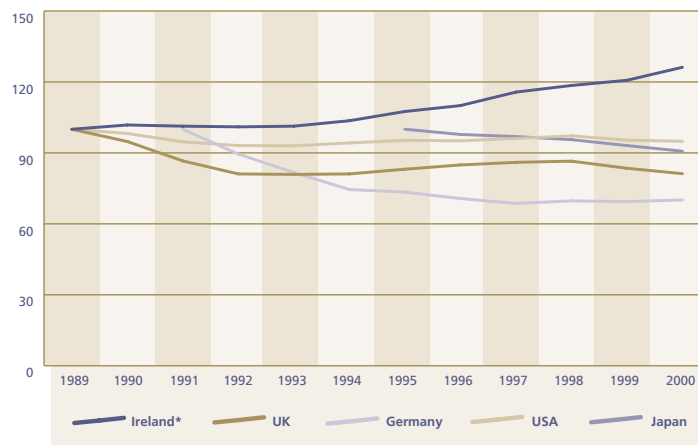


	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Job Gains	8,199	8,352	9,095	11,606	12,975	14,875	16,128	17,602	19,418	25,811
Job Losses	-6,963	-7,940	-6,673	-6,421	-5,848	-7,380	-6,202	-8,466	-10,828	-9,611
Net Change	1,236	412	2,422	5,185	7,127	7,495	9,926	9,136	8,590	16,200

- ▶ Gross job gains increased by 17,612 (+214.8%) to a level of 25,811 over the period 1991/2000. The increase recorded in 2000 was 6,393 (+32.9%) the highest level ever achieved.
- ▶ Job losses rose from 6,963 in 1991 to a high of 10,828 in 1999 and, in 2000, declined by 11.2% to 9,611. This represents an increase of 38.0% over the ten year period as a whole. Job losses have increased by 64.3% since 1995.
- ▶ Net change in foreign-owned companies stood at 1,236 in 1991 before declining to 412 in 1992. Over the years 1993 to 1997, net change rose each year to reach 9,926 in 1997. Over the following two years 1998/1999, net change declined (-3.5%) to a level of 8,590 in 1999 due to the rise in the level of job losses in these two years. In 2000, the net change position rose dramatically to reach 16,200, 88.6% above the 1999 level. This is due to the combination of a significant increase (+32.9%) in new job creation and a reduction (-11.2%) in job losses.

## 2 INTERNATIONAL TRENDS IN MANUFACTURING EMPLOYMENT

**Chart 11** *International Trends in Manufacturing Employment (Employment Expressed as a Percentage of 1989 Level)<sup>5</sup>*



	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000*
Ireland **	100.0	101.8	101.3	101.0	101.3	103.6	107.5	110.0	115.7	118.5	120.7	126.2
UK	100.0	94.8	86.6	81.1	80.9	81.1	83.1	84.9	86.0	86.5	83.5	81.2
Germany			100.0	89.5	81.7	74.5	73.4	70.7	68.6	69.7	69.4	70.1
USA	100.0	98.2	94.7	93.1	93.0	94.2	95.3	95.1	96.1	97.2	95.4	94.9
Japan							100.0	97.8	96.9	95.6	93.1	90.7

Source: OECD Main Economic Indicators December 2000  
 \* Quarter 3  
 \*\* Forfas Employment Survey

OECD figures show that Ireland is unusual in displaying significantly increased manufacturing employment over the twelve year period 1989-2000. The above chart highlights the growth in manufacturing employment in Ireland over the last twelve years and contrasts this with falls in the major economies for which these data are available.

### USA

The USA suffered a decline in manufacturing employment of 5.1% since 1989. In contrast, Ireland's rate of manufacturing employment growth over the twelve year period was 26.2%.

Manufacturing employment in the USA declined by 7.0% between 1989 and 1993. However, employment recovered since then and increased by 2.1% between 1993 and the third quarter of 2000.

<sup>5</sup> Except Germany and Japan where employment is expressed as a percentage of the 1991 and 1995 levels respectively in the OECD statistics.