



Annual Employment Survey 2004

May 2005

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1. Introduction

This document sets out the final results of the 2004 Annual Employment Survey¹. The survey is an annual census of employment in all manufacturing and internationally traded services companies supported by the enterprise development agencies (IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta). The survey has been carried out each year since 1973. Forfás, in line with its mandate to co-ordinate the activities of Enterprise Ireland and IDA Ireland, continues to carry out the survey with the co-operation of Enterprise Ireland and IDA Ireland regional staff. Shannon Development carries 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 provides the results for inclusion 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 structure of the main body of the report is as follows: Section 3 provides overall employment trends in manufacturing and internationally-traded services and examines these trends on the basis of Irish and foreign-ownership, sector and region. Data on part-time, temporary and short-term contract employment are also provided for companies within the remit of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta. Shannon Development does not currently collect data on these 'non-permanent' forms of employment.

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

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

2. Summary of Main Findings

The report provides an analysis of employment levels in manufacturing and internationally traded services companies under the remit of IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta.² The Annual Employment Survey is a key instrument in tracking the performance of agency-assisted enterprise within the country. The main findings of the 2004 survey are set out below.

- Total permanent full-time employment in agency-assisted companies operating in the manufacturing or internationally traded services sectors amounted to 298,143 in 2004, a decrease of 1,091 jobs on employment levels in 2003.
- Total full-time employment among Irish-owned companies amounted to 149,113 in 2004, a drop of 817 on the previous year. This is the third consecutive year in which the indigenous enterprise base has experienced a decrease in employment levels. Despite this recent downward trend, employment among Irish-owned companies is still some 28,330 or 23.4 percent higher than it was at the beginning of the ten year period examined in this paper.
- Among Foreign-owned companies, total full-time employment amounted to 149,030 in 2004 – a small decrease of 274 on the previous year. This continues a four year downward trend in employment since 2000. On the positive side, Employment among foreign-owned companies has increased by 35,288 or 31 percent over the ten year period covered.
- Employment by Sectors – Manufacturing / Financial & Internationally Traded Services. Manufacturing sectors remained under pressure in 2004 with job losses outweighing job gains to leave a net position of -3,302. The Internationally Traded Services sector by contrast has proven more resilient, recording net gains of 1,783 in the current operating year.
- Irish-owned manufacturing and internationally traded services firms located in Dublin accounted for 42,328 (28.3 percent) of total full-time employment in 2004 as opposed to 31,564 (26.1 percent) in 1995 which represents growth of 10,764 (34 percent) over the span. In overall terms, the Border, Midlands and West (BMW) region accounted for 35,058 (29 percent) of indigenous employment in 1995, and while this had declined to 26.8 percent in 2000, it has risen again in recent years and stood at 28.1 percent at the end of 2004.
- Within Irish-owned manufacturing, the one sectoral area that has shown a continuous decline over the ten year period examined is *Textiles, Clothing and Leather* which has seen permanent full-time employment drop from 12,035 in 1995 to 4,353 in 2004.
- Foreign-owned manufacturing and internationally traded services firms located in Dublin accounted for 51,073 (34 percent) in 2004 as opposed to 31,499 (27.7 percent) at the beginning of the ten year period. While employment in foreign-owned companies in the BMW region grew by 3,620 between 1995 and 2000, the share of foreign-owned employment accounted for by the BMW region declined from 27.3% to 21.0%. Since 2000, employment in foreign-owned companies in the BMW region has decreased from 34,712 to 29,699 in 2004 and its share of total foreign-owned employment in manufacturing and international services has declined further to 19.9%.

² The population of firms covered in the survey includes companies receiving assistance at any stage from these agencies or their predecessor agencies.

- Within Foreign-owned *Electronics* sector employment grew from 24,188 to 39,231 between 1995 and 2000, but has declined in the four years since then and stood at 24,886 at the end of 2004.

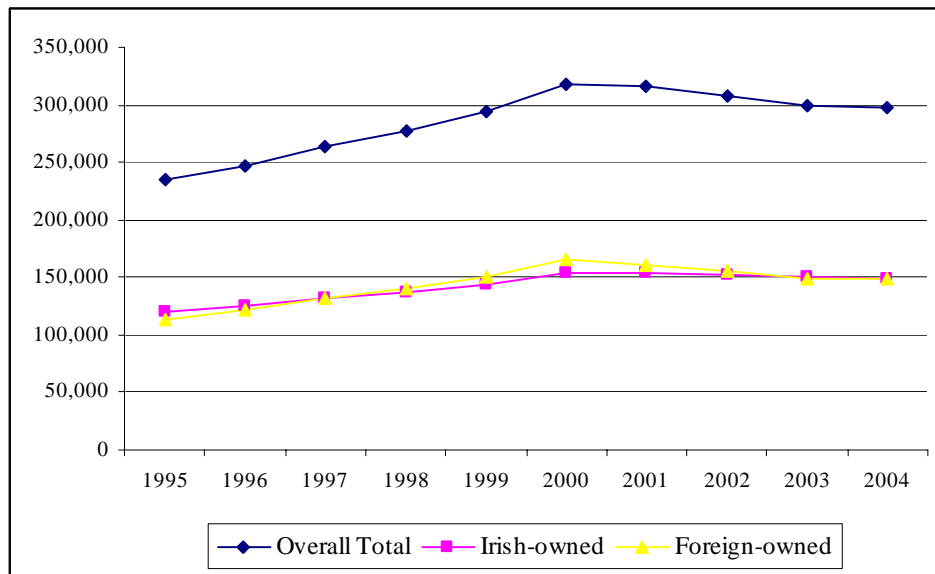
3. Employment Trends 1995-2004

Chart 1

Trends in Permanent Full-time Employment 1995-2004.

Overall Total and Irish and Foreign Components

IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Overall Total | 234,525 | 246,979 | 263,009 | 277,565 | 294,608 | 318,694 | 315,598 | 307,293 | 299,234 | 298,143 |
| Irish-owned | 120,783 | 125,885 | 131,852 | 137,037 | 144,059 | 153,107 | 154,494 | 152,184 | 149,930 | 149,113 |
| Foreign-owned | 113,742 | 121,094 | 131,157 | 140,528 | 150,549 | 165,587 | 161,104 | 155,109 | 149,304 | 149,030 |

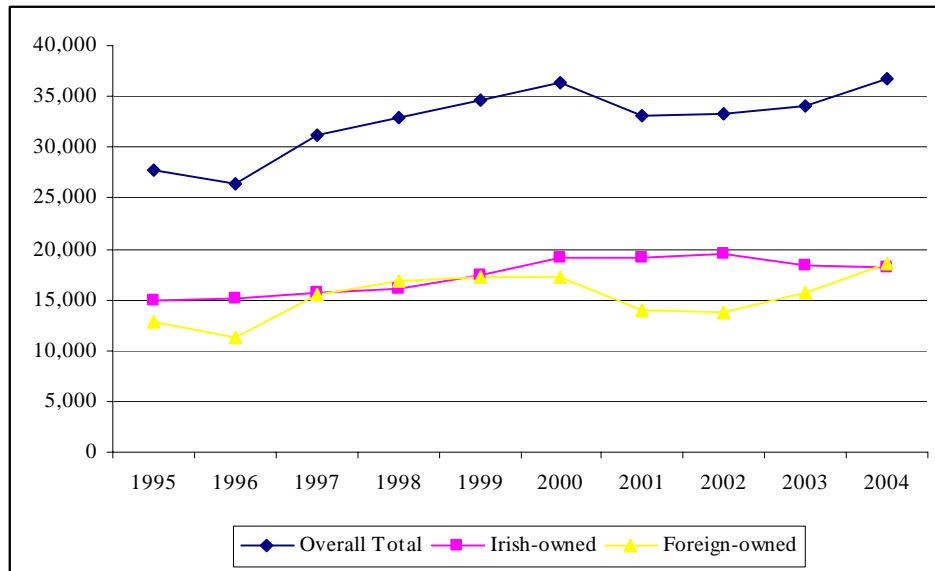
Total permanent full-time employment in agency-assisted companies operating in the manufacturing or internationally traded services sectors amounted to 298,143 in 2004, a decrease of 1,091 jobs on employment levels in 2003.

Total full-time employment among Irish-owned companies amounted to 149,113 in 2004, a drop of 817 on the previous year. This is the third consecutive year in which the indigenous enterprise base has experienced a decrease in employment levels. Despite this recent downward trend, employment among Irish-owned companies is still some 28,330 or 23.4 percent higher than it was at the beginning of the ten year period examined in this paper.

Among Foreign-owned companies, total full-time employment amounted to 149,030 in 2004, a small decrease of 274 on the previous year. This is the fourth consecutive year in which employment has decreased. Employment among foreign-owned companies has increased by 35,288 or 31 percent over the ten year period covered.

Chart 2

**Trends in Part-time, Temporary and Short-term Contract Employment 1995-2004.
Overall Total and Irish and Foreign Components
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta³**



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|---------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Overall Total | 27,752 | 26,383 | 31,141 | 32,881 | 34,647 | 36,400 | 33,141 | 33,319 | 34,003 | 36,755 |
| Irish-owned | 14,843 | 15,176 | 15,650 | 16,035 | 17,486 | 19,133 | 19,139 | 19,483 | 18,284 | 18,143 |
| Foreign-owned | 12,909 | 11,207 | 15,491 | 16,846 | 17,161 | 17,267 | 14,002 | 13,836 | 15,719 | 18,612 |

In addition to permanent full-time employment, there were a further 36,755 jobs of a temporary or part-time nature⁴ recorded in agency-assisted companies in 2004. This represents an increase of 2,752 on the previous year and an increase of 9,003 (or 32.5 percent) on the number engaged in 1995.

Among Irish-owned companies, there was a drop in temporary and part-time employment of 141 in 2004. Nevertheless, the current level of 18,143 is still some 3,300 (or 22.2 percent) higher than in 1995 when such employment amounted to 14,843.

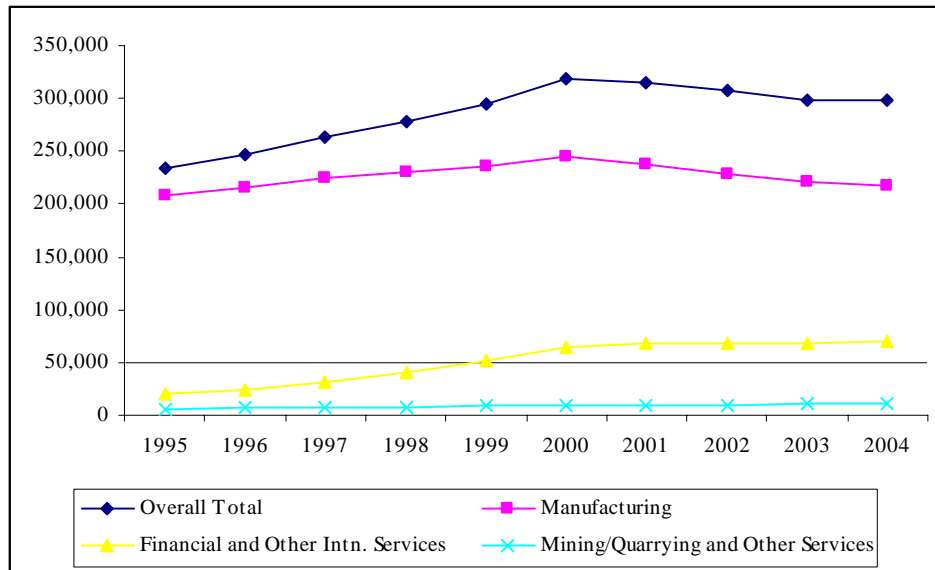
Employment of a temporary or part-time nature among Foreign-owned companies amounted to 18,612 in 2004, an increase of 2,893 on the previous year. Examining the trends longitudinally, this represents an increase of 5,703 over the ten year period covered in this document.

³ Note: Excludes companies under the remit of Shannon Development.

⁴ The full definitions of the jobs falling into this category are set out in Appendix 3.

Chart 3

**Trends in Permanent Full-time Employment 1995-2004.
Manufacturing/Financial and Other International Services/Other Activities
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta**



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Overall Total | 234,525 | 246,979 | 263,009 | 277,565 | 294,608 | 318,694 | 315,598 | 307,293 | 299,234 | 298,143 |
| Manufacturing | 208,785 | 215,595 | 224,689 | 229,868 | 235,526 | 245,744 | 238,346 | 229,314 | 221,259 | 217,957 |
| Financial and Other Intn. Services | 19,447 | 24,537 | 31,039 | 39,881 | 50,764 | 63,777 | 67,307 | 67,951 | 67,662 | 69,445 |
| Mining/Quarrying and Other Services | 6,293 | 6,847 | 7,281 | 7,816 | 8,318 | 9,173 | 9,945 | 10,028 | 10,313 | 10,741 |

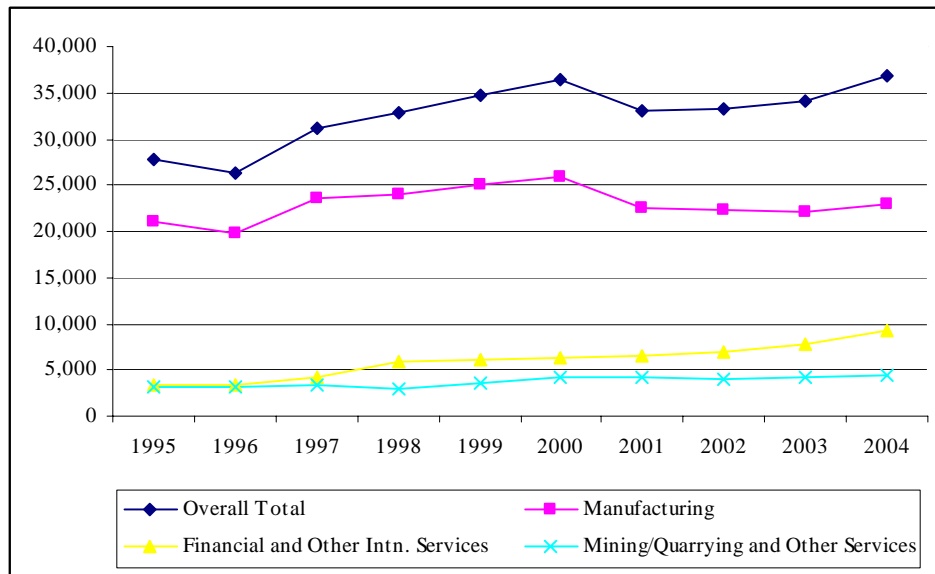
The table segments permanent full-time employment into three broad sectoral categories: *manufacturing*, *internationally traded services*, and a residual element of *mining, quarrying and other services*.

It is evident from the graph that manufacturing accounts for almost all of the net decrease in employment in agency-assisted companies since 2000. Between 1995 and 2000, permanent full-time employment in manufacturing rose from 208,785 to 245,744, an increase of 36,959. Manufacturing employment has decreased in each year since then and now stands at 217,957 – a return to its pre-1997 level.

Permanent full-time employment in internationally traded services grew from 19,447 in 1995 to 69,445 in 2004, an increase of 257 percent over the span. Employment in this sector was fairly flat between 2001 and 2003, but the current operating year has witnessed a net gain of 1,783. This has helped offset some of the losses in the manufacturing sector.

Chart 4

**Trends in Part-time, Temporary and Short-term Contract Employment 1995-2004.
Manufacturing/Financial and Other International Services/Other Activities
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta⁵**



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Overall Total | 27,752 | 26,383 | 31,141 | 32,881 | 34,647 | 36,400 | 33,141 | 33,319 | 34,003 | 36,755 |
| Manufacturing | 21,145 | 19,843 | 23,510 | 23,933 | 25,030 | 25,891 | 22,425 | 22,303 | 22,065 | 23,012 |
| Financial and Other Intn. Services | 3,441 | 3,399 | 4,223 | 5,916 | 6,039 | 6,363 | 6,596 | 6,939 | 7,744 | 9,319 |
| Mining/Quarrying and Other Services | 3,166 | 3,141 | 3,408 | 3,032 | 3,578 | 4,146 | 4,120 | 4,077 | 4,194 | 4,424 |

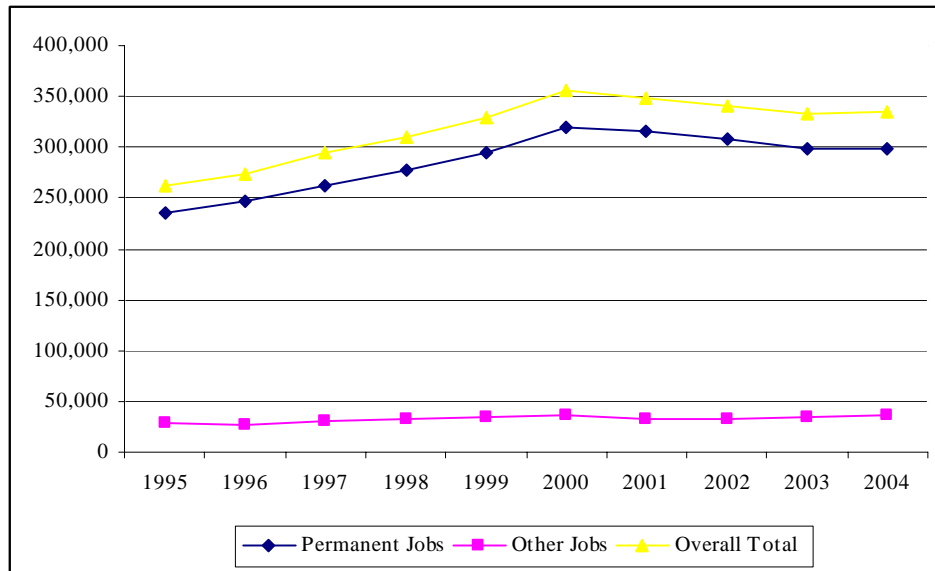
The table and accompanying chart document trends in temporary and part-time employment on the basis of *manufacturing, internationally traded services*, and a residual *mining, quarrying and other services* category.

Within manufacturing sectors, temporary and part-time employment grew during the latter half of the 1990's from 21,145 in 1995 to 25,891 in 2000. Although the years 2001-2003 were characterised by annual declines in employment levels, 2004 has witnessed gains of approximately 1,000 jobs in this sector.

Temporary and part-time employment within internationally traded services sectors has increased in almost each year of the time series, growing from 3,441 in 1995 to a peak of 9,319 in 2004.

⁵ Note: Excludes companies under the remit of Shannon Development

Chart 5
Trends in Permanent and Part-time Employment 1995-2004.
Manufacturing/Financial and Other International Services/Other Activities
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta⁶



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Permanent Jobs | 234,525 | 246,979 | 263,009 | 277,565 | 294,608 | 318,694 | 315,598 | 307,293 | 299,234 | 298,143 |
| Other Jobs | 27,752 | 26,383 | 31,141 | 32,881 | 34,647 | 36,400 | 33,141 | 33,319 | 34,003 | 36,755 |
| Overall Total | 262,277 | 273,362 | 294,150 | 310,446 | 329,255 | 355,094 | 348,739 | 340,612 | 333,237 | 334,898 |

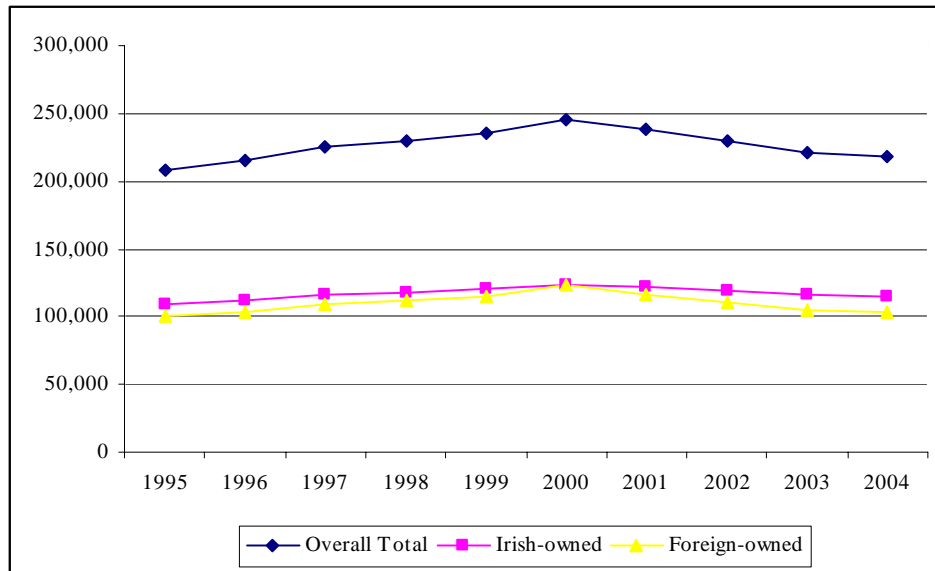
Chart 5 provides an overview of permanent full-time employment and temporary/part-time employment within agency assisted companies over the period 1995-2004. Taken in conjunction, these two categories of employment give an overall total of 334,898 jobs in agency assisted firms in 2004.

Temporary and part-time jobs accounted for 11 percent of total employment in 2004. This share has held relatively constant over the ten year period examined and is only marginally higher than the 10.6 percent share recorded in 1995.

⁶ Note: The figures for part-time, temporary and short-term employment exclude companies under the remit of Shannon Development.

Chart 6

**Trends in Permanent Full-time Employment in Manufacturing Sectors 1995-2004.
Overall Total and Irish and Foreign Components
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta**



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Overall Total | 208,785 | 215,595 | 224,689 | 229,868 | 235,526 | 245,744 | 238,346 | 229,314 | 221,259 | 217,957 |
| Irish-owned | 108,865 | 112,169 | 115,625 | 117,888 | 120,233 | 122,739 | 121,538 | 118,449 | 116,357 | 114,831 |
| Foreign-owned | 99,920 | 103,426 | 109,064 | 111,980 | 115,293 | 123,005 | 116,808 | 110,865 | 104,902 | 103,126 |

Chart 6 summarises trends in permanent full-time employment within **manufacturing sectors only** and presents these data on the basis of an Irish and Foreign breakdown.

Chart 6 shows that indigenous manufacturing employment grew from 108,865 in 1995 to a peak of 122,739 in 2000 and has declined in each year since then to its current level of 114,831. Although this represents a net decrease of 7,908 on its peak in 2000, permanent full-time employment within Irish-owned manufacturing companies is still 5,966 (or 5.5 percent) higher than it was at the beginning of the ten year period examined in this paper.

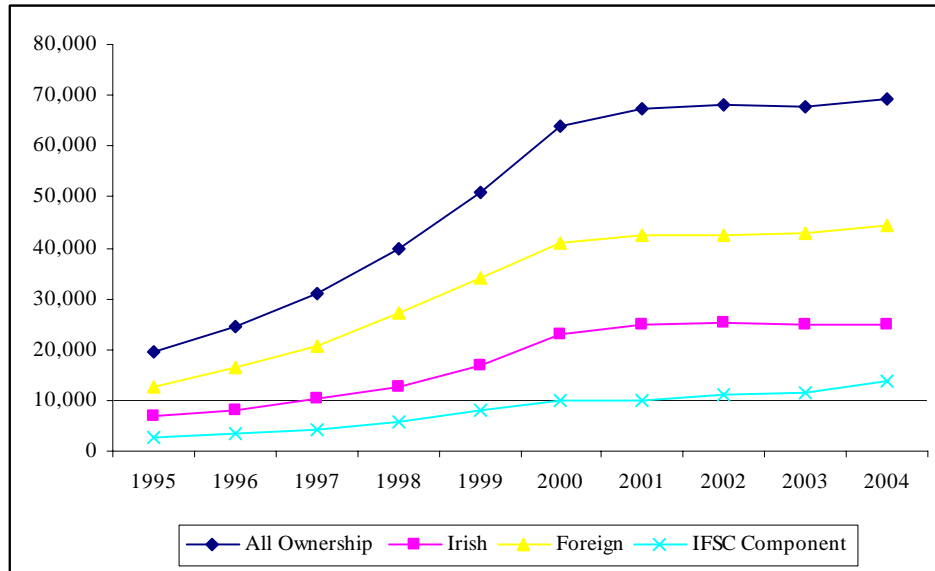
Trends in permanent full-time employment among the foreign-owned manufacturing base parallel that of indigenous industry. The table shows that growth was concentrated in the late 1990's with employment peaking at 123,005 in 2000. Most of this net increase has been lost in the four years since then and the current operating level of 103,126 sees manufacturing employment among foreign-owned companies returning to the level it was around 1996.

Chart 7

Trends in Permanent Full-time Employment in Financial and other International Services 1995-2004.

Overall Total and Irish and Foreign Components

IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-----------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| All Ownership | 19,447 | 24,537 | 31,039 | 39,881 | 50,764 | 63,777 | 67,307 | 67,951 | 67,662 | 69,445 |
| Irish | 6,729 | 8,093 | 10,322 | 12,727 | 16,788 | 22,811 | 24,824 | 25,393 | 24,927 | 25,013 |
| Foreign | 12,718 | 16,444 | 20,717 | 27,154 | 33,976 | 40,966 | 42,483 | 42,558 | 42,735 | 44,432 |
| <i>IFSC Component</i> | 2,627 | 3,322 | 4,279 | 5,670 | 8,036 | 9,883 | 10,025 | 11,188 | 11,476 | 13,600 |

The trends in permanent full-time employment in **financial and other international services** are presented in Chart 7 on the basis of Irish and Foreign ownership.

Permanent full-time employment in internationally traded services sectors amounted to 69,445 in 2004 with foreign-owned companies accounting for 44,432 (64 percent) and Irish-owned companies accounting for the other 25,013 (36 percent).

Among Irish-owned companies, employment in internationally traded services companies sectors grew from a base of 6,729 in 1995 to a peak of 25,393 in 2002, an increase of 277 percent. Employment has fallen back slightly since then and currently stands at 25,013.

Among foreign-owned companies, permanent full-time employment grew from 12,718 to a peak of 44,432 in the current operating year.

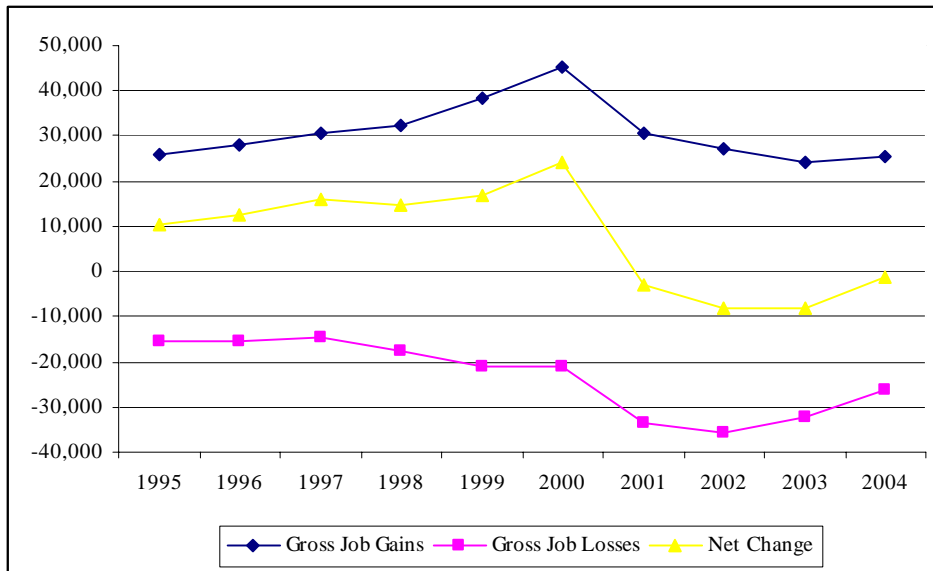
Chart 7 also highlights the international financial services component of this employment and shows that such employment (mostly IFSC related) has grown in each year from 1995 when it stood at 2,627 to its current level of 13,600, an increase of some 418 percent.

Chart 8

Trends in Permanent Full-time Employment in 1995-2004.

Gross Job Gains/Gross Job Losses/Net Change

IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



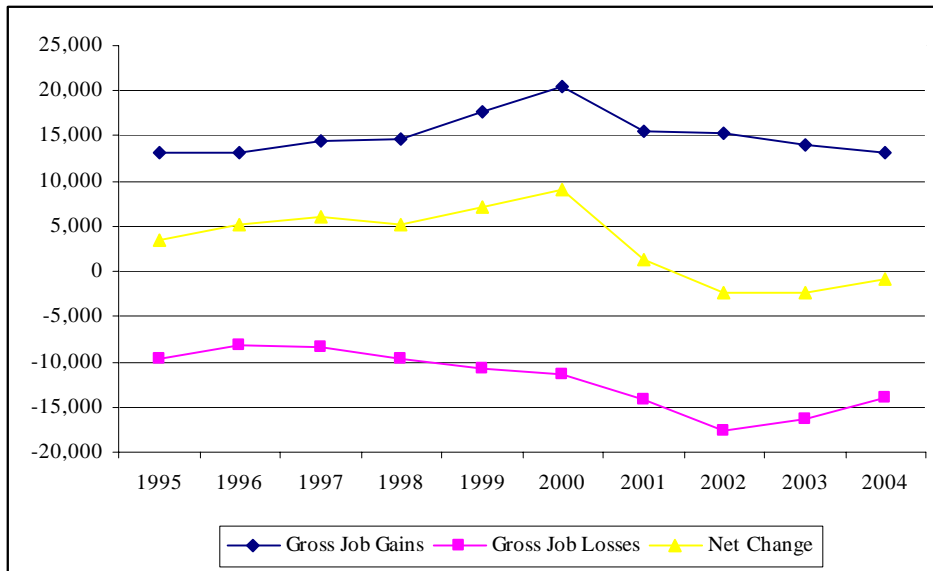
| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Gross Job Gains | 26,053 | 28,002 | 30,525 | 32,270 | 38,279 | 45,065 | 30,499 | 27,176 | 24,288 | 25,291 |
| Gross Job Losses | -15,478 | -15,548 | -14,495 | -17,714 | -21,236 | -20,979 | -33,595 | -35,481 | -32,347 | -26,382 |
| Net Change | 10,575 | 12,454 | 16,030 | 14,556 | 17,043 | 24,086 | -3,096 | -8,305 | -8,059 | -1,091 |

Chart 8 provides further information regarding the net change in full-time employment in each year from 1995-2004. The net change in employment comprises gross job gains (in firms that have increased employment) *less* gross job losses (in firms where employment numbers have decreased).

In 2004, there were gross job gains of 25,291 as opposed to gross job losses of 26,382 to give a net position of -1,091.

Chart 9

**Trends in Permanent Full-time Employment in Irish-owned Companies 1995-2004.
Gross Job Gains/Gross Job Losses/Net Change
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta**



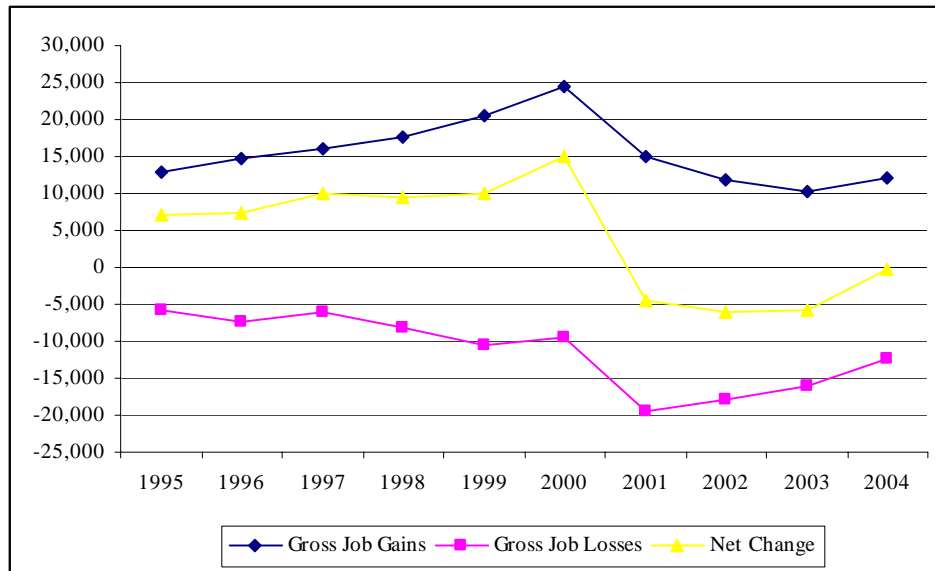
| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|-------------|
| Gross Job Gains | 13,137 | 13,190 | 14,371 | 14,749 | 17,666 | 20,494 | 15,520 | 15,354 | 14,066 | 13,141 |
| Gross Job Losses | -9,576 | -8,088 | -8,404 | -9,564 | -10,644 | -11,446 | -14,133 | -17,664 | -16,320 | -13,958 |
| Net Change | 3,561 | 5,102 | 5,967 | 5,185 | 7,022 | 9,048 | 1,387 | -2,310 | -2,254 | -817 |

Chart 9 illustrates trends in gross job gains and gross job losses among Irish-owned firms during the period 1995-2004. Gross job gains of 13,141 were outweighed by losses of 13,958 to give a net position of -817 jobs in the current operating year.

The net losses in recent years is in stark contrast to the experience of indigenous industry between 1995 and 2001 during which time it witnessed positive year on year net increases in permanent full-time employment.

Chart 10

**Trends in Permanent Full-time Employment in Foreign-owned Companies 1995-2004.
Gross Job Gains/Gross Job Losses/Net Change
IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta**



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|-------------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|---------------|---------------|-------------|
| Gross Job Gains | 12,916 | 14,812 | 16,154 | 17,521 | 20,613 | 24,571 | 14,979 | 11,822 | 10,222 | 12,150 |
| Gross Job Losses | -5,902 | -7,460 | -6,091 | -8,150 | -10,592 | -9,533 | -19,462 | -17,817 | -16,027 | -12,424 |
| Net Change | 7,014 | 7,352 | 10,063 | 9,371 | 10,021 | 15,038 | -4,483 | -5,995 | -5,805 | -274 |

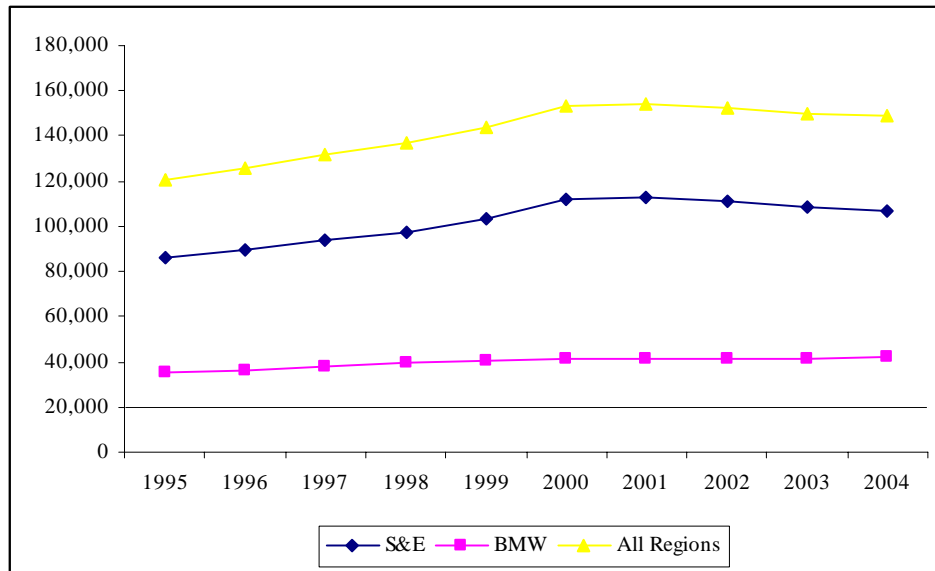
Chart 10 provides an overview of gross job gains and gross job losses in foreign-owned agency-assisted companies between 1995 and 2004.

The period 1995 to 2000 was a period of strong employment growth characterised by positive year on year net increases in employment. This was particularly marked in 2000 when 15,038 jobs were created over and above the losses incurred in that year.

This moved into negative territory between 2001 and 2004. The current operating year has witnessed gains of 12,150; these have been outweighed by losses of 12,424 to give a net position of -274.

Chart 11

Trends in Permanent Full-time Employment in Irish-owned Companies by Region 1995-2004. Manufacturing/Financial and Other International Services/Other Activities. IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Dublin | 31,564 | 33,402 | 36,353 | 38,307 | 41,763 | 47,134 | 47,827 | 45,719 | 44,009 | 42,328 |
| Mid East | 10,379 | 11,072 | 11,726 | 11,851 | 12,598 | 13,530 | 14,441 | 14,581 | 14,304 | 14,329 |
| Mid West | 10,045 | 10,425 | 10,465 | 10,644 | 11,281 | 11,331 | 10,815 | 10,636 | 10,523 | 10,625 |
| South West | 18,370 | 18,813 | 19,430 | 19,993 | 20,484 | 22,769 | 22,349 | 22,968 | 22,857 | 22,870 |
| South East | 15,367 | 15,965 | 16,225 | 16,528 | 17,224 | 17,307 | 17,425 | 17,279 | 17,193 | 17,006 |
| Midlands | 5,704 | 5,843 | 6,340 | 6,759 | 7,048 | 7,014 | 7,309 | 7,705 | 8,062 | 8,843 |
| Border | 18,942 | 19,371 | 19,663 | 20,498 | 20,788 | 20,482 | 20,479 | 19,797 | 19,450 | 19,409 |
| West | 10,412 | 10,994 | 11,650 | 12,457 | 12,873 | 13,540 | 13,849 | 13,499 | 13,532 | 13,703 |
| All Regions | 120,783 | 125,885 | 131,852 | 137,037 | 144,059 | 153,107 | 154,494 | 152,184 | 149,930 | 149,113 |

The trends in permanent full-time employment among Irish-owned manufacturing and internationally traded services is examined on a regional basis above.

Dublin accounted for 42,328 (28.3 percent) of total indigenous employment in agency-supported companies in 2004. While this is higher than the share of indigenous employment it held in 1995 (26.1 percent), it represents a slight drop from the share it held when indigenous employment was at its peak in 2000 (30.7 percent).

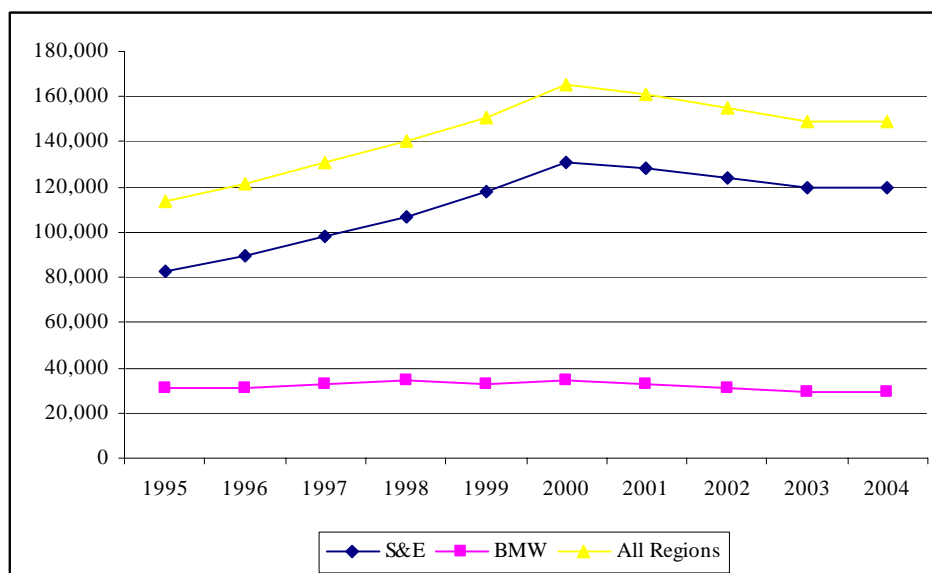
The other regions increasing their share of indigenous employment since 1995 include the **Mid-East** (from 8.6 to 9.6 percent), the **Midlands** (from 4.7 to 5.9 percent) and the **West** (from 8.6 to 9.2 percent).

The regions whose share of total indigenous employment has decreased over the period include, the **Mid-West** (from 8.3 to 7.1 percent), the **South-East** (from 12.7 to 11.4 percent) and the **Border** region (from 15.7 to 13 percent).

In overall terms, the Border, Midlands and West (BMW) region accounted for 35,058 (29 percent) of indigenous employment in 1995, and while this had declined to 26.8 percent in 2000, it has risen again in recent years and stood at 28.1 percent at the end of 2004.

Chart 12

Trends in Permanent Full-time Employment in Foreign-owned Companies by Region 1995-2004. Manufacturing/Financial and Other International Services/Other Activities. IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Dublin | 31,499 | 34,635 | 39,102 | 43,972 | 51,698 | 58,022 | 55,918 | 54,782 | 51,107 | 51,073 |
| Mid East | 10,046 | 11,630 | 13,745 | 13,940 | 14,409 | 16,060 | 15,202 | 15,295 | 15,971 | 15,803 |
| Mid West | 15,479 | 16,316 | 17,324 | 19,400 | 20,937 | 22,671 | 21,606 | 19,379 | 18,195 | 17,932 |
| South West | 15,560 | 16,277 | 16,657 | 17,907 | 19,529 | 22,745 | 23,571 | 22,507 | 22,225 | 22,594 |
| South East | 10,066 | 10,959 | 11,363 | 11,217 | 11,373 | 11,377 | 11,720 | 12,189 | 12,134 | 11,929 |
| Midlands | 5,885 | 5,974 | 6,133 | 6,099 | 5,658 | 5,740 | 5,484 | 5,346 | 4,756 | 4,605 |
| Border | 14,886 | 14,142 | 14,499 | 14,512 | 13,508 | 13,614 | 12,500 | 11,920 | 11,234 | 11,218 |
| West | 10,321 | 11,161 | 12,334 | 13,481 | 13,437 | 15,358 | 15,103 | 13,691 | 13,682 | 13,876 |
| All Regions | 113,742 | 121,094 | 131,157 | 140,528 | 150,549 | 165,587 | 161,104 | 155,109 | 149,304 | 149,030 |

Trends in permanent full-time employment in foreign-owned manufacturing and internationally traded services are detailed above and the key messages to emerge are summarised below.

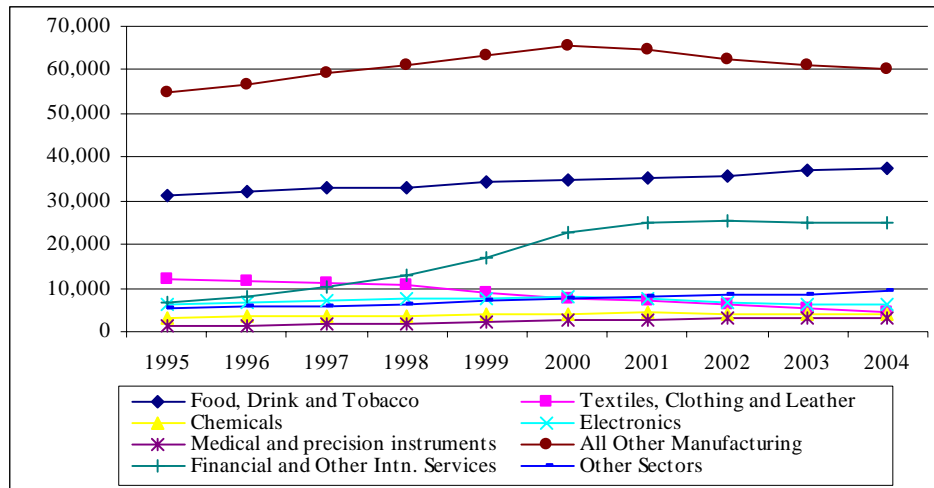
Dublin has witnessed its share of manufacturing and internationally traded services employment grow from 27.7 percent in 1995 to 34 percent in 2004. During this period, employment levels rose from 31,499 to 51,073 which represents an increase of 19,574 (62 percent) over the span.

Other regions that increased their share of foreign-owned manufacturing and internationally traded services employment between 1995 and 2004 include the **Mid-East** (from 8.8 to 10.5 percent) and the **South-West** (from 13.7 to 15 percent). The regions with the largest drop in their share of full-time employment over the span are the **Border** region (from 13.1 to 7.5 percent) and the **Midlands** (from 5.2 to 3.1 percent).

In overall terms, the **BMW** region's share of permanent full-time employment in foreign-owned companies has declined from 27.3 percent in 1995 to 19.8 percent in 2004.

Chart 13

Sectoral Trends in Permanent Full-time Employment within Irish-owned Companies 1995-2004. Manufacturing/Financial and Other International Services/Other Activities. IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Food, Drink and Tobacco | 31,373 | 32,069 | 33,030 | 33,185 | 34,379 | 34,826 | 35,339 | 35,874 | 37,000 | 37,313 |
| Textiles, Clothing and Leather | 12,035 | 11,594 | 11,069 | 10,494 | 8,812 | 7,795 | 7,008 | 6,387 | 5,238 | 4,353 |
| Chemicals | 3,187 | 3,354 | 3,470 | 3,669 | 3,864 | 4,114 | 4,320 | 4,109 | 3,817 | 3,935 |
| Electronics | 6,293 | 6,849 | 7,226 | 7,725 | 7,626 | 7,962 | 7,386 | 6,737 | 6,439 | 6,023 |
| Medical and precision instruments | 1,327 | 1,464 | 1,641 | 1,920 | 2,251 | 2,589 | 2,852 | 3,024 | 2,957 | 3,073 |
| All Other Manufacturing | 54,650 | 56,839 | 59,189 | 60,895 | 63,301 | 65,453 | 64,633 | 62,318 | 60,906 | 60,134 |
| Financial and Other Intn. Services | 6,729 | 8,093 | 10,322 | 12,727 | 16,788 | 22,811 | 24,824 | 25,393 | 24,927 | 25,013 |
| Other Sectors | 5,189 | 5,623 | 5,905 | 6,422 | 7,038 | 7,557 | 8,132 | 8,342 | 8,646 | 9,269 |
| Overall Total | 120,783 | 125,885 | 131,852 | 137,037 | 144,059 | 153,107 | 154,494 | 152,184 | 149,930 | 149,113 |

Chart 13 presents a sectoral breakdown of permanent full-time employment in Irish-owned manufacturing and internationally traded services. The salient trends to emerge from the graphic and accompanying table are summarised below.

The one sectoral area that has shown a continuous decline over the ten year period examined is *Textiles, Clothing and Leather* where permanent full-time employment has dropped from 12,035 in 1995 to 4,353 in 2004.

A sector that features prominently as one of the growth areas is the *Financial and Other Internationally Traded Services* sector where employment has grown from 6,729 in 1995 to 25,013 in 2004 - an increase of 271 percent over the span.

The chart also highlights the importance of Food and Drink sector as it accounts for some 37,313 or 25 percent of all permanent jobs in indigenous manufacturing and traded services areas.

Total employment in the relatively 'high tech' areas of *Chemicals*, *Electronics* and *Medical Devices* amounts to just 13,031 or 8.7 percent of total indigenous employment. The largest single category in the table above is *All Other Manufacturing* which comprises the relatively low technology sectors such as wood, paper and printing, general engineering and non-metallic minerals.

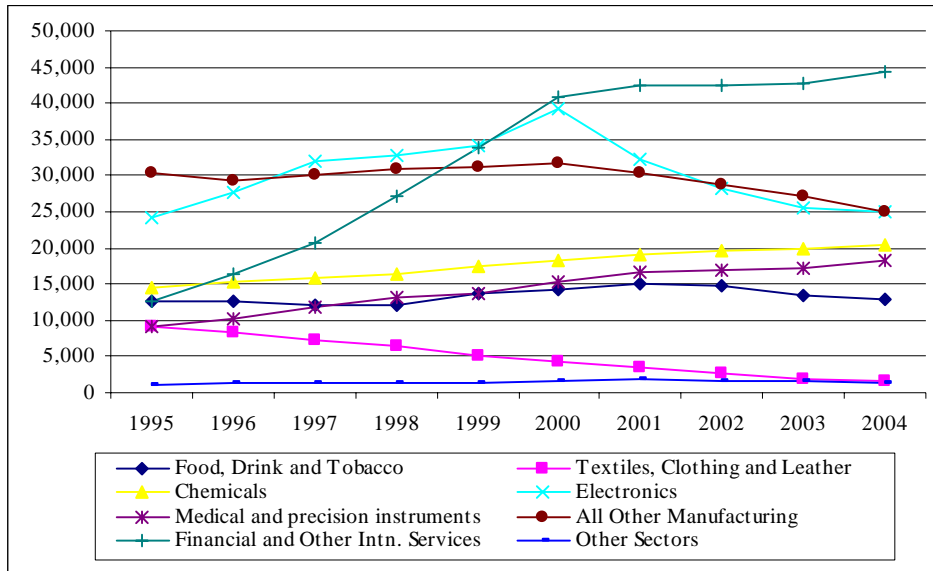
A more detailed sectoral breakdown of employment in indigenous manufacturing and internationally traded services is presented in Appendix 2 (Table 5).

Chart 14

Sectoral Trends in Permanent Full-time Employment within Foreign-owned Companies 1995-2004.

Manufacturing/Financial and Other International Services/Other Activities.

IDA Ireland, Enterprise Ireland, Shannon Development & Údarás Na Gaeltachta



| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Food, Drink and Tobacco | 12,702 | 12,582 | 12,131 | 12,064 | 13,639 | 14,283 | 15,124 | 14,728 | 13,323 | 12,879 |
| Textiles, Clothing and Leather | 9,012 | 8,235 | 7,160 | 6,504 | 5,017 | 4,209 | 3,382 | 2,614 | 1,884 | 1,481 |
| Chemicals | 14,447 | 15,263 | 15,809 | 16,523 | 17,489 | 18,320 | 19,104 | 19,515 | 19,844 | 20,439 |
| Electronics | 24,118 | 27,789 | 32,015 | 32,840 | 34,095 | 39,231 | 32,181 | 28,295 | 25,450 | 24,886 |
| Medical and precision instruments | 9,212 | 10,279 | 11,762 | 13,052 | 13,837 | 15,242 | 16,596 | 17,007 | 17,310 | 18,387 |
| All Other Manufacturing | 30,429 | 29,278 | 30,187 | 30,997 | 31,216 | 31,720 | 30,421 | 28,706 | 27,091 | 25,054 |
| Financial and Other Intn. Services | 12,718 | 16,444 | 20,717 | 27,154 | 33,976 | 40,966 | 42,483 | 42,558 | 42,735 | 44,432 |
| Other Sectors | 1,104 | 1,224 | 1,376 | 1,394 | 1,280 | 1,616 | 1,813 | 1,686 | 1,667 | 1,472 |
| Overall Total | 113,742 | 121,094 | 131,157 | 140,528 | 150,549 | 165,587 | 161,104 | 155,109 | 149,304 | 149,030 |

The chart and the accompanying table present a sectoral analysis of employment in foreign-owned manufacturing and internationally traded services areas. Some of the key messages to emerge are summarised below:

The decline in *Textiles, Clothing and Leather* parallels the losses experienced by indigenous industry in this area. Permanent full-time employment in this sector has decreased from 9,012 in 1995 to 1,481 in 2004, possibly as a consequence of relocation to low cost economies.

The sectoral areas with the highest growth in employment during the latter part of the 1990's were the *Electronics* sector and *Internationally Traded Services* but the two sectors have faced different fortunes in more recent years. Employment in the Electronics sector increased from 24,188 to 39,231 between 1995 and 2000 only to witness employment levels returning to their pre-1995 levels in the four years since then. Employment in the

Internationally Traded Services sector has grown from 12,718 in 1995 to 44,432 in 2004. Although most of this growth was concentrated in the latter part of the 1990's, this sector has proved quite resilient to the general downturn impacting the economy and has recorded modest incremental gains over the past few years.

The Chemicals sector and the Medical Devices sector are two sectors where employment growth has remained steady throughout the ten year period examined in this paper. While employment growth in these sectors never matched the growth witnessed by the electronics sector, it is worth noting that they have both continued to experience a net increase in employment in the years since 2000.

A more detailed sectoral breakdown of employment in foreign-owned manufacturing and internationally traded services is presented in Appendix 2 (Table 6).

APPENDIX 1

Trends in Permanent Full-time Employment by Region 1995-2004 Overall Total and Irish and Foreign Components IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 1: Trends in Permanent Full-time Employment by Region

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------|--------|--------|--------|--------|--------|---------|---------|---------|--------|--------|
| Dublin | 63,063 | 68,037 | 75,455 | 82,279 | 93,461 | 105,156 | 103,745 | 100,501 | 95,116 | 93,401 |
| South East | 25,433 | 26,924 | 27,588 | 27,745 | 28,597 | 28,684 | 29,145 | 29,468 | 29,327 | 28,935 |
| Mid West | 25,524 | 26,741 | 27,789 | 30,044 | 32,218 | 34,002 | 32,421 | 30,015 | 28,718 | 28,557 |
| South West | 33,930 | 35,090 | 36,087 | 37,900 | 40,013 | 45,514 | 45,920 | 45,475 | 45,082 | 45,464 |
| Mid East | 20,425 | 22,702 | 25,471 | 25,791 | 27,007 | 29,590 | 29,643 | 29,876 | 30,275 | 30,132 |
| Midlands | 11,589 | 11,817 | 12,473 | 12,858 | 12,706 | 12,754 | 12,793 | 13,051 | 12,818 | 13,448 |
| Border | 33,828 | 33,513 | 34,162 | 35,010 | 34,296 | 34,096 | 32,979 | 31,717 | 30,684 | 30,627 |
| West | 20,733 | 22,155 | 23,984 | 25,938 | 26,310 | 28,898 | 28,952 | 27,190 | 27,214 | 27,579 |

Table 2: Trends in Permanent Full-time Employment in Irish-owned Firms by Region

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Dublin | 31,564 | 33,402 | 36,353 | 38,307 | 41,763 | 47,134 | 47,827 | 45,719 | 44,009 | 42,328 |
| South East | 15,367 | 15,965 | 16,225 | 16,528 | 17,224 | 17,307 | 17,425 | 17,279 | 17,193 | 17,006 |
| Mid West | 10,045 | 10,425 | 10,465 | 10,644 | 11,281 | 11,331 | 10,815 | 10,636 | 10,523 | 10,625 |
| South West | 18,370 | 18,813 | 19,430 | 19,993 | 20,484 | 22,769 | 22,349 | 22,968 | 22,857 | 22,870 |
| Mid East | 10,379 | 11,072 | 11,726 | 11,851 | 12,598 | 13,530 | 14,441 | 14,581 | 14,304 | 14,329 |
| Midlands | 5,704 | 5,843 | 6,340 | 6,759 | 7,048 | 7,014 | 7,309 | 7,705 | 8,062 | 8,843 |
| Border | 18,942 | 19,371 | 19,663 | 20,498 | 20,788 | 20,482 | 20,479 | 19,797 | 19,450 | 19,409 |
| West | 10,412 | 10,994 | 11,650 | 12,457 | 12,873 | 13,540 | 13,849 | 13,499 | 13,532 | 13,703 |

Table 3: Trends in Permanent Full-time Employment in Foreign-owned Firms by Region

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Dublin | 31,499 | 34,635 | 39,102 | 43,972 | 51,698 | 58,022 | 55,918 | 54,782 | 51,107 | 51,073 |
| South East | 10,066 | 10,959 | 11,363 | 11,217 | 11,373 | 11,377 | 11,720 | 12,189 | 12,134 | 11,929 |
| Mid West | 15,479 | 16,316 | 17,324 | 19,400 | 20,937 | 22,671 | 21,606 | 19,379 | 18,195 | 17,932 |
| South West | 15,560 | 16,277 | 16,657 | 17,907 | 19,529 | 22,745 | 23,571 | 22,507 | 22,225 | 22,594 |
| Mid East | 10,046 | 11,630 | 13,745 | 13,940 | 14,409 | 16,060 | 15,202 | 15,295 | 15,971 | 15,803 |
| Midlands | 5,885 | 5,974 | 6,133 | 6,099 | 5,658 | 5,740 | 5,484 | 5,346 | 4,756 | 4,605 |
| Border | 14,886 | 14,142 | 14,499 | 14,512 | 13,508 | 13,614 | 12,500 | 11,920 | 11,234 | 11,218 |
| West | 10,321 | 11,161 | 12,334 | 13,481 | 13,437 | 15,358 | 15,103 | 13,691 | 13,682 | 13,876 |

APPENDIX 2

Trends in Permanent Full-time Employment by Sector 1995-2004 Overall Total and Irish and Foreign Components IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 4: Trends in Permanent Full-time in Employment by Sector

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Food products beverages and tobacco | 44,075 | 44,651 | 45,161 | 45,249 | 48,018 | 49,109 | 50,463 | 50,602 | 50,323 | 50,192 |
| Textiles and textile products | 10,180 | 9,741 | 9,112 | 8,407 | 7,077 | 6,780 | 6,006 | 5,164 | 3,937 | 3,420 |
| Clothing, footwear and leather | 10,867 | 10,088 | 9,117 | 8,591 | 6,752 | 5,224 | 4,384 | 3,837 | 3,185 | 2,414 |
| Wood and wood products | 5,039 | 5,482 | 5,819 | 6,185 | 6,588 | 6,699 | 6,663 | 6,426 | 6,703 | 6,860 |
| Pulp paper and paper products; publishing and printing | 13,415 | 13,351 | 13,802 | 13,866 | 13,975 | 14,117 | 13,779 | 12,972 | 11,912 | 10,922 |
| Chemicals chemical products and man-made fibres | 17,634 | 18,617 | 19,279 | 20,192 | 21,353 | 22,434 | 23,424 | 23,624 | 23,661 | 24,374 |
| Rubber and plastic products | 9,012 | 9,206 | 9,666 | 9,903 | 9,941 | 10,454 | 10,024 | 9,456 | 9,243 | 8,821 |
| Other non-metallic mineral products | 10,329 | 10,671 | 11,053 | 10,853 | 11,196 | 12,014 | 11,995 | 11,843 | 11,780 | 11,667 |
| Basic and fabricated metal products | 15,315 | 15,827 | 16,898 | 17,732 | 18,556 | 18,698 | 18,297 | 17,545 | 16,871 | 16,773 |
| Machinery and equipment n.e.c. | 11,586 | 11,880 | 11,961 | 12,341 | 13,307 | 13,639 | 13,153 | 12,356 | 11,753 | 11,412 |
| Office machinery and computers | 10,815 | 13,994 | 17,399 | 17,592 | 19,131 | 22,775 | 19,792 | 17,996 | 16,287 | 16,423 |
| Electrical machinery and apparatus n.e.c. | 11,551 | 11,932 | 12,856 | 13,611 | 13,106 | 14,395 | 12,168 | 11,002 | 9,842 | 9,646 |
| Electronic Equipment | 8,045 | 8,712 | 8,986 | 9,362 | 9,484 | 10,023 | 7,607 | 6,034 | 5,760 | 4,840 |
| Medical and precision instruments | 10,539 | 11,743 | 13,403 | 14,972 | 16,088 | 17,831 | 19,448 | 20,031 | 20,267 | 21,460 |
| Transport equipment | 11,430 | 10,413 | 10,436 | 10,961 | 11,012 | 11,653 | 11,540 | 11,106 | 10,385 | 9,809 |
| Other manufacturing n.e.c. | 8,953 | 9,287 | 9,741 | 10,051 | 9,942 | 9,899 | 9,603 | 9,320 | 9,350 | 8,924 |
| International Financial Services | 2,627 | 3,322 | 4,279 | 5,670 | 8,036 | 9,883 | 10,025 | 11,188 | 11,476 | 12,407 |
| Other International Services | 16,820 | 21,215 | 26,760 | 34,211 | 42,728 | 53,894 | 57,282 | 56,763 | 56,186 | 57,038 |
| Other Sectors | 6,293 | 6,847 | 7,281 | 7,816 | 8,318 | 9,173 | 9,945 | 10,028 | 10,313 | 10,741 |

APPENDIX 2 (cont'd)

Trends in Permanent Full-time Employment by Sector 1995-2004
Overall Total and Irish and Foreign Components
IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 5: Trends in Permanent Full-time in Irish-owned Employment by Sector

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Food products beverages and tobacco | 31,373 | 32,069 | 33,030 | 33,185 | 34,379 | 34,826 | 35,339 | 35,874 | 37,000 | 37,313 |
| Textile and textile products | 4,208 | 4,264 | 4,213 | 3,984 | 3,809 | 3,671 | 3,422 | 3,141 | 2,438 | 2,128 |
| Clothing, footwear and leather | 7,827 | 7,330 | 6,856 | 6,510 | 5,003 | 4,124 | 3,586 | 3,246 | 2,800 | 2,225 |
| Wood and wood products | 4,708 | 4,967 | 5,072 | 5,438 | 5,792 | 5,870 | 5,859 | 5,720 | 6,011 | 6,189 |
| Pulp paper and paper products; publishing and printing | 11,223 | 11,494 | 11,869 | 11,984 | 12,131 | 12,376 | 12,197 | 11,392 | 10,401 | 9,623 |
| Chemicals chemical products and man-made fibres | 3,187 | 3,354 | 3,470 | 3,669 | 3,864 | 4,114 | 4,320 | 4,109 | 3,817 | 3,935 |
| Rubber and plastic products | 5,360 | 5,479 | 5,665 | 5,843 | 5,842 | 6,076 | 5,810 | 5,359 | 5,362 | 5,209 |
| Other non-metallic mineral products | 8,152 | 8,552 | 8,965 | 8,977 | 9,342 | 10,143 | 10,237 | 9,959 | 9,893 | 9,872 |
| Basic and fabricated metal products | 10,137 | 10,563 | 11,329 | 11,812 | 12,667 | 13,207 | 13,023 | 12,760 | 12,316 | 12,685 |
| Machinery and equipment n.e.c. | 6,352 | 6,655 | 6,680 | 6,752 | 7,145 | 7,323 | 7,057 | 6,898 | 6,661 | 6,737 |
| Office machinery and computers | 1,306 | 1,503 | 1,547 | 1,413 | 1,489 | 1,626 | 1,640 | 1,703 | 1,556 | 1,496 |
| Electrical machinery and apparatus n.e.c. | 3,201 | 3,346 | 3,600 | 4,057 | 3,860 | 4,002 | 3,440 | 2,990 | 2,724 | 2,725 |
| Electronic Equipment | 1,786 | 2,000 | 2,079 | 2,255 | 2,277 | 2,334 | 2,306 | 2,044 | 2,159 | 1,802 |
| Medical and precision instruments | 1,327 | 1,464 | 1,641 | 1,920 | 2,251 | 2,589 | 2,852 | 3,024 | 2,957 | 3,073 |
| Transport equipment | 1,873 | 1,806 | 1,874 | 1,975 | 2,116 | 2,079 | 2,066 | 2,031 | 1,984 | 1,894 |
| Other manufacturing n.e.c. | 6,845 | 7,323 | 7,735 | 8,114 | 8,266 | 8,379 | 8,384 | 8,199 | 8,278 | 7,925 |
| International Financial Services | 630 | 694 | 900 | 1,025 | 1,806 | 2,505 | 2,541 | 2,741 | 2,786 | 2,788 |
| Other International Services | 6,099 | 7,399 | 9,422 | 11,702 | 14,982 | 20,306 | 22,283 | 22,652 | 22,141 | 22,225 |
| Other Sectors | 5,189 | 5,623 | 5,905 | 6,422 | 7,038 | 7,557 | 8,132 | 8,342 | 8,646 | 9,269 |

APPENDIX 2 (cont'd)

Trends in Permanent Full-time Employment by Sector 1995-2004
Overall Total and Irish and Foreign Components
IDA Ireland, Enterprise Ireland, Shannon Development and Údarás na Gaeltachta

Table 6: Trends in Permanent Full-time in Foreign-owned Employment by Sector

| | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Food products beverages and tobacco | 12,702 | 12,582 | 12,131 | 12,064 | 13,639 | 14,283 | 15,124 | 14,728 | 13,323 | 12,879 |
| Textiles and textile products | 5,972 | 5,477 | 4,899 | 4,423 | 3,268 | 3,109 | 2,584 | 2,023 | 1,499 | 1,292 |
| Clothing, footwear and leather | 3,040 | 2,758 | 2,261 | 2,081 | 1,749 | 1,100 | 798 | 591 | 385 | 189 |
| Wood and wood products | 331 | 515 | 747 | 747 | 796 | 829 | 804 | 706 | 692 | 671 |
| Pulp paper and paper products; publishing and printing | 2,192 | 1,857 | 1,933 | 1,882 | 1,844 | 1,741 | 1,582 | 1,580 | 1,511 | 1,299 |
| Chemicals chemical products and man-made fibres | 14,447 | 15,263 | 15,809 | 16,523 | 17,489 | 18,320 | 19,104 | 19,515 | 19,844 | 20,439 |
| Rubber and plastic products | 3,652 | 3,727 | 4,001 | 4,060 | 4,099 | 4,378 | 4,214 | 4,097 | 3,881 | 3,612 |
| Other non-metallic mineral products | 2,177 | 2,119 | 2,088 | 1,876 | 1,854 | 1,871 | 1,758 | 1,884 | 1,887 | 1,795 |
| Basic and fabricated metal products | 5,178 | 5,264 | 5,569 | 5,920 | 5,889 | 5,491 | 5,274 | 4,785 | 4,555 | 4,088 |
| Machinery and equipment n.e.c. | 5,234 | 5,225 | 5,281 | 5,589 | 6,162 | 6,316 | 6,096 | 5,458 | 5,092 | 4,675 |
| Office machinery and computers | 9,509 | 12,491 | 15,852 | 16,179 | 17,642 | 21,149 | 18,152 | 16,293 | 14,731 | 14,927 |
| Electrical machinery and apparatus n.e.c. | 8,350 | 8,586 | 9,256 | 9,554 | 9,246 | 10,393 | 8,728 | 8,012 | 7,118 | 6,921 |
| Electronic Equipment | 6,259 | 6,712 | 6,907 | 7,107 | 7,207 | 7,689 | 5,301 | 3,990 | 3,601 | 3,038 |
| Medical and precision instruments | 9,212 | 10,279 | 11,762 | 13,052 | 13,837 | 15,242 | 16,596 | 17,007 | 17,310 | 18,387 |
| Transport equipment | 9,557 | 8,607 | 8,562 | 8,986 | 8,896 | 9,574 | 9,474 | 9,075 | 8,401 | 7,915 |
| Other manufacturing n.e.c. | 2,108 | 1,964 | 2,006 | 1,937 | 1,676 | 1,520 | 1,219 | 1,121 | 1,072 | 999 |
| International Financial Services | 1,997 | 2,628 | 3,379 | 4,645 | 6,230 | 7,378 | 7,484 | 8,447 | 8,690 | 9,619 |
| Other International Services | 10,721 | 13,816 | 17,338 | 22,509 | 27,746 | 33,588 | 34,999 | 34,111 | 34,045 | 34,813 |
| Other Sectors | 1,104 | 1,224 | 1,376 | 1,394 | 1,280 | 1,616 | 1,813 | 1,686 | 1,667 | 1,472 |

APPENDIX 3

Overview of Methodology and Definitions

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

In line with previous years, census returns as at 31st October for Permanent Full-time and for Temporary, Part-time and Short Term Contract employment combined 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 may differ from those previously reported.

Definitions

| | |
|-----------------------------|---|
| Permanent Full-Time: | Employees who have been employed full time for nine months or longer or who will be on contracts of nine months or longer on 31 st October 2004. |
| Part-time/Temporary: | Employees who have been employed for less than 9 months in the 12 months to 31 st October 2004 or who are on employment contracts of less than 9 months or employed on a casual basis. |
| Job Gains: | Increase in employment, on a company by company basis, arising in the survey year over and above the company's employment level in the previous year. |
| Job Losses: | Decrease in employment on a company by company basis, arising in the survey year. |
| Net Change: | Difference between the total job gains and the total job losses in the survey year. |