

Regional Labour Markets Bulletin 2014

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An tSeirbhís Oideachais Leanúnaigh agus Scileanna
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Expert Group on 
Future Skills Needs

Regional Labour Markets Bulletin 2014

A Report prepared by the Skills and Labour Market
Research Unit in SOLAS

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Foreword

The Regional Labour Markets Bulletin 2014 has been produced by the Skills and Labour Market Research Unit in SOLAS on behalf of the Expert Group on Future Skills Needs. It is the third in a series of reports aimed at providing an analysis of the key labour market indicators for each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.



There is a growing demand for labour market intelligence that goes beyond the national level and reflects the fact that geographical and sectoral variations occur in Ireland in terms of skills supply and demand. It has been recognised that the availability of timely and comprehensive regional labour market information is necessary for adopting a more robust and empirical data-driven approach to decision making at regional level. This report goes a considerable way towards furthering an understanding of both the labour market and the economic sector and enterprise composition of Ireland's regions.

The report shows that similarities exist across regions in terms of certain labour market indicators, such as the type of vacancies advertised through the public employment services and certain elements of the profile of job seekers. However, the report also highlights the differences across regions in areas such as labour force participation, employment and unemployment rates, as well as in terms of economic profiles, namely economic sector and industrial composition and, arising out of this, their economic output.

The above similarities and variations in the composition of Ireland's workforce and economic profiles by region are an important aspect for consideration in any data driven decision-making process pertinent to the labour market. The data outlined in this report will serve as an important tool for those working in education and training provision, career guidance and associated services for job seekers at a regional level.

A handwritten signature in black ink that reads 'Una Halligan'.

Una Halligan
Chairperson, Expert Group on Future Skills Needs

Executive Summary

The *Regional Labour Markets Bulletin 2014* provides an overview of the Irish labour market at regional level with the objective of supporting the decision making process in the areas of education and training provision, labour market policies and career guidance.

The report first presents labour market data relevant to each region, allowing a comparison across the regions and between regions and the State in terms of the supply and demand for skills. The subsequent sections of the report are profiles of each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.

When interpreting the data, it should be borne in mind that while the report aims to profile the regional labour markets, recruitment and sourcing of skills for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country. In other words, the supply emerging from education and training in a region is not confined to that region. Equally, the job opportunities arising in a region are not restricted to the local labour supply.

There are differences across regional labour markets, such as the contribution of agriculture, low tech or high tech manufacturing, and knowledge intensive services to regional employment, unemployment rates, labour force participation rates, and the share of high skilled employment.

Selected key points

- Employment: in quarter 4 2013,
 - Dublin and the West regions had the highest employment rates at 64.6% and 63.6% respectively, whereas the Border region had the lowest rate, at 56.1%
 - the Mid-East region had the highest labour force participation rate, at 63.3%, while the Border region had the lowest
 - Dublin had the highest share of employment in knowledge intensive services (namely market, high tech and financial services) - one quarter of its employment was in these services; it also had the highest share of its employment in food and accommodation, as well as transportation, while it had the lowest share of industrial employment; the South-West region accounted for the largest share of industrial and manufacturing employment nationally followed by Dublin; however, Dublin had the highest share of high technology manufacturing employment nationally and of high tech manufacturing employment within the regions
 - Dublin had the highest share of persons employed in high skilled occupations - almost two-in-five were either professionals or associate professionals, whereas the corresponding figure in the Border, Midland, and South-East regions was just one-in-four
 - between quarter 4 2012 and quarter 4 2013, the South-East and Border regions recorded the strongest rate of employment growth compared to the other regions, at 8% each; employment remained static in the Mid-East region - the only region that recorded no growth

- inter-regional employment: for some regions, where a person lives and where they work can vary; this is most evident in the Mid-East region where almost 41% of workers who reside in the region were employed elsewhere - primarily in Dublin

- Unemployment: in quarter 4 2013,
 - the highest unemployment rates were observed in the South-East region (15.5%), the Midland region (13.7%) and the Border region (13.5%); the lowest rates were observed in Dublin (10%), the South-West (10.2%) and Mid-West region (10.7%)
 - reflecting the size of its labour market, Dublin accounted for approximately one quarter of all unemployed persons (approximately 63,000) in the State, even though it had the lowest unemployment rate of all regions
 - the largest share of unemployed persons had previously been employed in either skilled trades or elementary occupations across all regions; however there were a considerable number of people, especially youths, who had no previous occupation, reflecting the difficulties which some people experience entering employment

- Education:
 - Dublin had the highest number of students enrolled in both higher education and further education and training (FET) in 2013 - it accounted for 40% of undergraduates, 56% of postgraduates and one third of FET certificates/enrolments; the South-West region accounted for 16% of undergraduates and 13% of postgraduates; the Midland region accounted for only 3% of students overall
 - early school leavers (ESL) from education and training: in quarter 4 2013, three regions, namely, the Midland, Border and South-East, had an ESL rate higher than the national average rate of 8%

- Active enterprises in the private business economy: in 2012,
 - the wholesale and retail sector accounted for the largest share of active enterprises in most regions; the information and communication (ICT) and manufacturing sectors each accounted for 6% of all active enterprises in the private business economy in the State, while professional activities accounted for 16% of all active enterprises nationally; the Dublin region had a higher share of active enterprises in professional, scientific and technical activities than any other region
 - small and medium sized enterprises (SMEs) accounted for 99.7% of the total enterprise population in the State and for 68% of total persons engaged; while large enterprises (employing 250 persons or more) accounted for only 0.3% of the total enterprise population, they accounted for 32% of all persons engaged; in each region, the vast majority of enterprises are micro enterprises (employing fewer than 10 persons); these enterprises accounted for at least 90% of all active enterprises in all regions except Dublin, where their share was 89%

- Medium to large businesses:
 - the highest number of medium to large enterprises in each sector, with the exception of agriculture, was located in the Dublin region; Dublin accounted for more than four fifths of all medium to large financial and insurance enterprises operating in the State, two thirds of medium to large in telecommunications, computing and related activities, and two-in-five in industry, and three-in-five in business activities¹
 - in each region, medium to large enterprises were most numerous in business activities - their share ranged from 25% in the Midland region to 38% in Dublin

- Economic output - Gross Value Added
 - Dublin accounted for 41% of the State's total output in 2011; it also had the highest output per person, whereas the Border and Midland regions had the lowest
 - Dublin and the South-West region combined accounted for 60% of the total output of the State in 2011 compared to 58% in 2010

- Industrial output value: in 2011,
 - the South-West region accounted for €36.7 billion (or 36%) of the €100 billion of national gross industrial output; Dublin accounted for a further €19.2 billion (or almost a fifth)
 - the value of the industrial output in the modern sector alone was €58.8 billion; the South-West and Dublin regions combined accounted for two thirds of the value of this output

- Public Employment Service (PES) vacancies: in 2013,²
 - the highest number of PES vacancies was advertised for the Dublin region, accounting for 39% of the approximately 64,000 vacancies advertised nationally
 - the distributions of vacancies by occupational group varied little across regions, with most vacancies advertised for elementary, personal services and associate professional (mainly sales) occupations, and comparatively few for managers, professionals, admin/secretarial and operatives; this could be due to an occupational bias in advertising, as many employers advertise vacancies for higher skilled positions through channels other than DSP Jobs Ireland³

¹ Business activities: Includes real estate, renting, and a range of other business activities (e.g. legal, accounting, management consultancy) and R&D; excludes computing activities.

² These refer to all vacancies advertised by employers through the National Contact Centre in the Department of Social Protection (DSP Jobs Ireland); the DSP vacancy data excludes vacancies advertised as part of Work Placement and Job Bridge schemes.

³ The distributions of vacancies advertised through DSP Jobs Ireland are skewed towards skilled trades, caring/leisure services and elementary occupations. On the other hand, vacancies advertised through IrishJobs.ie (a private online advertising service) are skewed towards managerial, professional and associate professional occupations. In 2013, vacancies for professional occupations accounted for 5% of all vacancies advertised through DSP Jobs Ireland compared to 31% of all vacancies advertised through IrishJobs.ie. The number of vacancies advertised through DSP Jobs Ireland in 2013 was over double the number advertised through IrishJobs.ie (i.e. on average 5,300 vacancies per month compared to 2,300 per month respectively).

- Live Register:
 - the number of persons on the Live Register has increased in all regions since early 2008; however, compared to April 2013, there was a 7% decline in the number of persons on the Live Register in April 2014; the South-West region experienced the greatest year-on-year decline of 9%, compared to a 5% decline observed in the West region
 - Dublin accounted for one quarter of the approximately 388,600 persons on the Live Register in April 2013

- Job seekers registered with the Public Employment Service (PES), in May 2014:
 - Dublin accounted for about one quarter of all job seekers registered with the PES nationally
 - the occupational distributions of job seekers was similar across regions, with the highest share of job seekers in each region having previously been employed in skilled trades and elementary occupations
 - compared to other regions, Dublin had the highest share of job seekers previously employed as either professionals or associate professionals, at almost one-fifth combined; at the same time, it had the lowest share of job seekers previously employed in skilled trades.

Introduction

The *Regional Labour Markets Bulletin 2014* provides an overview of the labour market at regional level with the objective of supporting the decision making process in the areas of education, including higher education and further education and training provision, labour market policies, and career guidance.

The report sets out the key indicators relating to the supply and demand for skills in each of the eight regions in Ireland. The regional analysis is based on the NUTS 3 regional classification, which is also used by the Central Statistics Office (CSO) when reporting data nationally and internationally (e.g. Eurostat). The NUTS 3 regions are: Border, Dublin, Mid-East, Mid-West, Midland, South-East, South-West and West.⁴

NUTS 3 regions in Ireland

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

The regional analysis includes data from a variety of sources: CSO Quarterly National Household Survey (QNHS), CSO StatBank (CSO Main Data Dissemination Service, providing access to CSO Census of Industrial Production, CSO Construction and Building Inquiry, CSO Annual Service Inquiry, CSO Business Demography, CSO Live Register, CSO Census 2011, CSO National Accounts (for Gross Value Added (GVA), etc.), Experian (company database), Department of Social Protection (DSP) Jobs Ireland, DSP Job Seekers (Client Services System), IDA, newspapers, press releases, Higher Education Authority (HEA), and the Department of Education and Skills (DES) (for Post Leaving Cert (PLC) course data). When interpreting the data the following should be borne in mind:

- The report aims to profile the regional labour markets; however, recruitment for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country; in other words, the supply emerging from education and training in a region is not confined to that region, just as the job opportunities in a region are not restricted to the local labour supply
- The report uses the most recent data available at the time of analysis; however, the time periods associated with the latest available data vary across data sources (e.g. the latest employment data at occupational level is for the period October to December (quarter 4) 2013, vacancy data covers the whole year (2013), the higher education and training data refers to enrolments in 2013 (while

⁴ The NUTS 3 classification differs from the Education and Training Boards (ETB) regions. For instance, in the NUTS 3 classification, Mayo is classified in the West region; in the ETB classification, Mayo is grouped with Sligo and Leitrim, which the NUTS 3 classifies as the Border counties. In the NUTS 3 classification, Meath is classified in the Mid-East region; in the ETB grouping, it is grouped with Louth, which NUTS 3 classifies as a Border county.

FET data refers to certification in 2013), CSO Census data refers to 2011, CSO StatBank data refers to various years, while announcements of job creation in the media are characterised by a certain lead-time, and it may take a number of years for all the jobs to materialise.

- The units of measurement, concepts and definitions used differ across data sources (e.g. the CSO in the QNHS uses the ILO definition of employment and unemployment,⁵ and the main unit of analysis is an individual, Business Demography counts both active enterprises and persons engaged in the population of active enterprises, Census data refers to persons, while the definition of employment and unemployment is based on principal economic status)
- In many instances, data at regional level is too small for statistical inferences and may be subject to statistical error (e.g. observations less than 1,000 cannot be reported for any statistics based on the QNHS; changes over time in some cases may be variations caused by sampling, rather than the trend)
- Occupational classifications differ across data sources and some accuracy is lost when mapping one classification to another (e.g. DSP uses MANCO, while the CSO uses the Standard Occupational Classification (SOC) 2010)
- In relation to vacancy data, only vacancies advertised through the Public Employment Service (DSP Jobs Ireland) are presented; the PES vacancy data is a subset of all vacancies advertised nationally and underrepresents the total vacancy market in the country
- In each region, recent examples are given of companies which announced, through the media (e.g. newspapers), the creation of jobs in the short-medium term; this is not an exhaustive list of all companies and is for illustrative purposes only; much of the job creation amongst micro or small companies may not be announced in the media
- The education and training overview covers only a sub-set of all provision
 - enrolment data is provided for higher education (undergraduate and postgraduate courses) and Post Leaving Cert (PLC) courses; the data refers to all years of a course duration (e.g. 1 year or up to 5 years for some courses such as medicine)
 - enrolment data by discipline for FÁS courses is not available at regional level; however, as most FÁS courses are of less than one year in duration, certification data from the SOLAS Results Capture and Certification Request System (RCCRS) is used as an indication of learner activity in this sector; however, RCCRS data does not include all FÁS data⁶
- The provision of PLC and FÁS courses became the responsibility of the Education and Training Boards in the latter half of 2013; formerly, these courses had been delivered by the Vocational Educational Committees and FÁS respectively
- The term ‘industry’ is broader than ‘manufacturing’; the industrial sector includes manufacturing, extraction/mining, and utilities, with the largest share being made up of manufacturing activities
- Knowledge intensive services (KIS) - Eurostat defines the following sectors as knowledge-intensive services, where aggregations are made at NACE 2 digit level:

⁵ Based on International Labour Office (ILO) definition, the labour force is the total number of people employed and unemployed. Employed population consists of those persons who during the reference week did any work for pay or profit for at least one hour, or were not working but had jobs from which they were temporarily absent. Unemployed persons comprise persons aged 15 to 74 who: are without work during the reference week, are available to start work within the next two weeks, and have been actively seeking work in the past four weeks or had already found a job to start within the next three months.

⁶ For example, the RCCRS does not include data on apprenticeship, the construction skills certification scheme (CSCS) and the quarrying skills certification scheme (QSCS).

- knowledge-intensive market services (water and air transport, legal and accounting, management consultancy, architectural and engineering, advertising and market research, other scientific and technical activities, employment and security related activities - corresponding to NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80)
- knowledge-intensive financial services (financial and insurance services- corresponding to NACE Rev. 2 codes 64, 65, 66)
- high tech knowledge-intensive services (ICT excluding publishing, research and development activities - corresponding to NACE Rev. 2 codes 59 - 63, 72), and
- other knowledge-intensive services (PAD, education, health and social work, arts, entertainment and recreation, publishing and veterinary activities - corresponding to NACE Rev. 2 codes 58, 75, 84 - 93)
- the focus in the report is on knowledge-intensive high tech, market and financial services, since other knowledge intensive services include the public sector activities
- The information and communication sector (referred to as ICT) includes computer programming, telecommunications, information services, publishing and broadcasting; it does not include ICT equipment manufacturing or wholesale activities in computers, computer peripheral equipment and software
- While cognisant of the fact that a share of healthcare and education is provided by the private sector, in a number of instances in the report, these two sectors (together with Public Administration and Defence) are referred to as ‘the public sector’, given the significant share of State provision and funding of services in these areas
- Regional Accounts are produced annually by CSO and provide estimates of Gross Value Added (GVA) for the two overall NUTS 2 regions and the eight Regional Authorities (equivalent to the NUTS 3 regions); Gross Value Added (GVA) is a measure of the value added generated by the production of goods and services.⁷ Total GVA is equivalent to GDP; it includes the profits of companies operating in a region, a considerable amount of which may accrue to non-residents. The Mid-East region and the Dublin region are affected by a substantial proportion of their workforce living in one region and commuting to work in another. In practice, this increases the GVA of the Dublin region, being the region to which most of the commuting to work takes place, as well as being the region that is the location of a relatively large number of businesses.⁸

Report Structure

The report begins with an overarching chapter where relevant labour market data is presented for all regions together, thereby allowing regions to be compared with each other and with the national average. This is then followed by eight chapters, each focusing on one of Ireland’s eight administrative (NUTS 3) regions outlining region specific labour market information. Census 2011 data at county level has been included for each region; while this data lags the most recent QNHS data, it nonetheless provides a useful indicator of the variations that may occur within a region at county level.

⁷ Gross Value Added (GVA) at basic prices is a measure of the value added generated by the production of goods and services. In the valuation at basic prices output is priced at the value received by the producer less product taxes payable (e.g. VAT, excise duties, etc.) plus subsidies receivable on products. Total GVA, when valued at market prices, is equivalent to GDP at market prices.

⁸ CSO, Statistical Yearbook of Ireland 2012.

1. Overview of the Regions

This section presents labour market data relevant to each region, allowing a comparison between regions and the national average in terms of the supply and demand for skills, as well as other indicators of relevance for the labour market.

Labour market indicators

Table 1 presents the selected demographic and labour market statistics by region for quarter 4 2013. Dublin had the largest population at almost 1.3 million persons, accounting for 28% of the total national population; it also had by far the highest population density with over 1,400 persons per km², compared to 66 persons per km² for the State; the West region had the lowest, at 32 persons per km².

The labour force participation rate⁹ was the lowest in the Border region (55%), and the highest in Mid-East (63%). Dublin and the West regions had participation rates above the national average, at 62% each, and the highest employment rates¹⁰, at 65% and 64% respectively. The South-East region had the highest unemployment rate at 15.5%, followed by the Midland and Border regions, at 13.7% and 13.5% respectively, while the lowest rates were in Dublin and the South-West regions, at 10% and 10.2% respectively. However, when compared with the situation a year previously, the South-East region appears to have performed rather well on the main labour market indicators - the number of persons in employment increased year-on-year by just above 15,000, the unemployment rate declined by 3.3 percentage points, while the labour force participation rate increased by 2 percentage points.

Table 1. Demographic and labour market statistics by region, Q4 2013

	Area km ²	Share (%) of area of State	POP 000s	P/km ²	POP 15-64 000s	LF 000s	E 000s	UE 000s	E rate	UE rate	P rate
Border	12,200	18%	506.7	42	319.2	214.8	186	29	56%	13.5%	55%
Dublin	900	1%	1,278.9	1,421	870.1	635.3	572	63	65%	10.0%	62%
Mid-East	6,100	9%	543.9	89	353.2	258.1	226	32	62%	12.5%	63%
Midland	6,500	9%	288.1	44	184.1	128.8	111	18	58%	13.7%	59%
Mid-West	8,200	12%	378.1	46	245.3	169.5	151	18	60%	10.7%	57%
South-East	9,400	14%	505.9	54	327.0	233.3	197	36	58%	15.5%	59%
South-West	12,200	18%	674.7	55	442.4	312.4	281	32	61%	10.2%	59%
West	13,800	20%	434.7	32	278.0	210.9	186	25	64%	11.9%	62%
Ireland	69,400	100%	4,611.0	66	3,019.3	2,163	1,910	253	61%	11.7%	60%

Source: Analysis by SOLAS (SLMRU) based on CSO data; www.iro.ie

The Border region added over 14,000 to the numbers in employment, the participation rate increased by 2.8 percentage points and the rate of unemployment reduced by 3 percentage points. At the same time, there

⁹ The participation rate is the number of persons in the labour force expressed as a percentage of the total population aged 15 or over.

¹⁰ The employment rate is the number of persons employed aged 15 to 64 expressed as a percentage of the population aged 15 to 64.

was effectively no change in the Mid-East region regarding unemployment indicators, while in the Mid-West region the reduction in unemployment could, to a large extent be due to people leaving the labour force (given that both the unemployment rate and the participation rate declined, accompanied by a marginal increase in the number in employment).

Sectoral employment

Table 2 presents the sectoral distribution of employment in each region in quarter 4 2013. Approximately one quarter of those at work in each region were employed in the public sector (public administration and defence, education, and health and social work combined) - the share being the highest in the Midland region, at 28%. Industry was the largest sector of employment in the Mid-West, South-West and West regions, while wholesale and retail was the largest in the Border, South-East, Mid-East, and Midland regions. In terms of employment share, agriculture was negligible in the Dublin region, while it accounted for at least 10% in the South-East, Border, West and Midland regions; of the total of 117,000 persons employed in agriculture nationally, more than a half were in the West, South-West, and South-East regions.

The Dublin region had the highest share of employment in knowledge intensive services (comprising knowledge intensive market, high tech, and financial services - broadly coinciding with high value added sectors - information and communication, professional, and financial services) accounting for just over a quarter of all in employment in the region.¹¹

Table 2. Sectoral employment by region, (000s) Q4 2013

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Agriculture	18.0	3.3	8.9	12.3	10.8	21.4	22.0	20.2	116.8
Industry	24.8	43.2	29.8	15.6	25.8	27.9	45.0	31.5	243.6
Construction	11.1	22.9	14.1	7.5	8.6	12.9	15.9	10.7	103.6
Wholesale and retail	29.2	75.8	34.0	16.3	19.2	29.0	41.5	25.5	270.4
Transportation	9.4	34.1	12.0	4.1	8.3	6.4	10.0	5.4	89.6
Accommodation and food	12.1	45.5	14.2	6.1	10.2	13.4	20.3	13.9	135.7
Information and communication	5.0	43.3	9.2	2.4	4.9	3.2	9.0	5.6	82.5
Financial	6.0	49.2	13.5	4.0	4.2	7.5	7.7	5.1	97.1
Professional activities	8.9	48.3	14.2	5.1	6.2	8.9	13.8	9.8	115.2
Admin. and support	4.5	23.1	7.6	2.3	4.4	5.5	11.8	5.3	64.5
PAD	9.0	32.2	11.3	7.2	8.0	9.2	10.1	7.9	95.0
Education	14.1	41.1	17.9	7.9	13.5	15.4	21.9	15.1	146.9
Health and social work	24.8	76.8	26.7	15.6	18.1	26.9	38.2	22.5	249.6
Other NACE activities	8.8	33.4	12.5	5.0	9.1	9.6	13.5	7.3	98.0
Total	185.8	572.1	225.9	111.4	151.3	197.1	280.6	185.9	1,909.8

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

¹¹ Knowledge-intensive market services (water & air transport, legal & accounting, management consultancy, architectural & engineering, advertising & market research, other scientific & technical activities, employment and security related activities - corresponding to NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80); High-tech knowledge-intensive services (ICT excluding publishing, R&D - corresponding to NACE Rev. 2 codes 59 - 63, 72); Knowledge-intensive financial services (financial & insurance - corresponding to NACE Rev. 2 codes 64, 65, 66). (Source: Eurostat)

Table 3 shows the number of active enterprises by economic sector for each region in 2012. There were approximately 185,500 active enterprises in the private business economy in Ireland.¹² Nationally, the highest number of active enterprises was in wholesale and retail (23%), construction (18%) and professional services (16%). The Dublin region accounted for almost one third of all active enterprises. The information and communication (ICT) sector accounted for 6% of all active enterprises in the State. The Dublin region accounted for half of all ICT enterprises active in the State, for two thirds of all active enterprises in financial and insurance activities, and for two fifths of all active enterprises in professional, scientific and technical activities. In Dublin, almost a quarter all active enterprises were engaged in professional, scientific and technical activities, the highest share of all regions.

Table 3. Number of active enterprises by business economy sectors and region¹³, 2012

Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Not known	Ireland
Mining & quarrying	22	**	**	24	16	13	19	39	**	353
Manufacturing	1,456	2,468	1,385	775	1,064	1,459	1,883	1,065	445	11,999
Electricity, gas, supply	15	**	**	6	15	**	12	14	**	326
Water; sewerage, waste	131	174	93	52	67	65	144	87	**	874
Construction	3,933	6,975	4,330	2,117	2,806	3,838	5,448	3,758	675	33,879
Wholesale and retail	4,931	11,066	4,550	2,442	3,469	4,689	6,279	3,942	843	42,210
Transportation	1,248	2,583	1,277	575	814	1,127	1,461	770	83	9,937
Accommodation & food	2,113	3,464	1,436	920	1,611	1,927	2,870	1,887	51	16,279
ICT	466	5,855	1,147	263	561	519	1,054	675	224	10,764
Financial & insurance	206	3,712	336	113	276	218	419	231	99	5,658
Real estate activities	956	4,440	1,333	464	752	949	1,580	1,064	99	11,637
Professional activities	1,845	13,088	3,215	1,032	2,010	2,116	4,650	1,934	436	30,325
Administration & support	914	4,022	1,220	492	1,097	962	1,487	891	204	11,289
Business economy (B to N,-642) *	18,332	57,989	20,395	9,302	14,584	17,975	27,386	16,381	3,187	185,530
Education	814	1,912	827	293	713	812	1,117	894	**	7,586
Business economy & education	19,146	59,901	21,222	15,297	9,595	18,787	28,503	17,275	3,187	193,116

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

** Indicates that the data has been suppressed by the CSO to protect the confidentiality of individual enterprises.

¹² The CSO Business Demography provides estimates of the population of active enterprises - all enterprises that were active at some point during the reference year 2012 (and earlier years) in the private business economy in Ireland. The private business economy covers the NACE Rev. 2 sectors B-N (excluding activities of holding companies). The NACE Rev. 2 sectors are: B - Mining and Quarrying, C - Manufacturing, D - Electricity, Gas, Steam and Air Conditioning Supply, E - Water Supply; Sewerage, Waste management etc. , F - Construction, G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles, H - Transportation and Storage, I - Accommodation and Food Service Activities, J - Information and Communication, K - Financial and Insurance Activities (excludes NACE code 64.20 activities of holding companies), L - Real Estate Activities, M - Professional, Scientific and Technical Activities, N - Administrative and Support Service Activities. Recently, coverage of business demography statistics has been extended to the education sector. Consequently, only figures the private business economy (NACE Rev. 2 sectors B-N) should be compared with earlier time series.

¹³ The geographical breakdown is based on the address at which an enterprise is registered for Revenue purposes. Where an enterprise has local units in several counties, but one head office where all employment is registered, all its employees are counted against the county where the head office is located; the apparent discrepancy in totals is due to a 'region unknown' category which has been excluded. The population figures for the years 2006 to 2009 were revised due to an increase in coverage of very small enterprises in the CSO's Business Register; the revisions have the effect of adding 3.7% to the total number of enterprises and 0.5% to the total number of persons engaged for the year 2009.

Table 4 presents the share of active enterprises in the private business economy, by size, for each region in 2012. Small and medium sized enterprises (SMEs) accounted for 99.7% of the total active enterprise population and for 68% of total persons engaged; despite accounting for only a small proportion of the total population of enterprises, large enterprises (with 250 or more persons engaged) accounted for just under one third of all persons engaged. In each region, the vast majority of enterprises were micro enterprises (with fewer than 10 persons engaged) - over 90% in all regions except Dublin (89%). For all other enterprise sizes, Dublin had above the national average share. The Mid-East and Midland regions had the highest share of micro enterprises.

Table 4. Active enterprises by enterprise size, 2012

Enterprise size by number of persons engaged	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Under 10	90.4%	89.1%	92.5%	92.0%	91.3%	91.1%	91.2%	91.2%	90.7%
10 - 19	2.1%	5.2%	4.3%	**	5.0%	3.8%	4.9%	4.4%	5.01%
20 - 49	2.7%	3.4%	2.2%	2.1%	2.5%	2.5%	2.5%	2.5%	2.7%
50 - 249	1.1%	1.8%	0.8%	0.9%	1.1%	0.9%	1.2%	1.3%	1.3%
SME (< 250) share	96.4%	99.5%	99.9%	95.1%	99.8%	98.3%	99.8%	99.4%	99.7%
250 and over	0.1%	0.5%	0.1%	**	0.2%	0.2%	0.2%	0.1%	0.3%

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

** Denotes small numbers that have been excluded to protect the confidentiality of individual enterprises.

Table 5 shows the data on companies employing 50 persons or more by region and sector for 2013.¹⁴ Reflecting the size and structure of its economy, the highest number of medium to large enterprises in each sector, with the exception of agriculture, was located in the Dublin region. Dublin accounted for more than four fifths of all medium to large financial and insurance enterprises operating in the State, two thirds of all medium to large enterprises in telecommunications, computing and related activities, three-in-five in business activities, and two-in-five in industry. The Border, Dublin and South-West regions accounted for the highest share of all agricultural medium to large enterprises nationally. The Midland region had the lowest number of medium to large enterprises in all sectors, except wholesale and retail.

In terms of the internal regional composition, medium to large enterprises were most numerous in business activities - their share of the regional total ranged from 25% in the Midland region to 38% in Dublin.

¹⁴ The sectoral classification of companies was only available by NACE Rev. 1; this differs from other sectoral data presented in this report which is based on the NACE Rev. 2 classification. The data in Table 5 is not comparable with corresponding data presented in *Regional Labour Markets Bulletin 2013* as it was derived from a different (and smaller) database; furthermore, the data is not comparable with the corresponding table in *Regional Labour Markets Bulletin 2012* since the data in the 2012 report is from a different data source and covers only those companies employing 51 persons or more.

Table 5. Number *of medium to large companies (employing 50 persons or over) by sector, 2013

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Agriculture, forestry & fishing	70	70	60	20	50	60	70	30	420
Industry	210	980	200	130	140	180	330	140	2,310
Construction	240	710	240	190	140	200	300	210	2,230
Wholesale & retail	260	1,260	250	190	190	230	360	190	2,930
Transport & Storage	80	340	60	30	50	40	90	40	740
Hotels/restaurants	100	480	60	40	60	70	120	70	1,000
Telecommunication, computing & related activities	40	570	40	20	30	40	80	30	830
Finance & insurance	70	1,950	80	30	40	50	90	60	2,350
Business activities**	690	4,980	530	270	350	370	840	420	8,440
PAD, Education & Health	60	380	70	40	50	50	90	70	790
Community, social & personal services, etc.	220	1,250	200	100	120	140	280	190	2,510
Total	2,030	12,950	1,780	1,070	1,210	1,410	2,640	1,460	24,550

Source: Experian

* All numbers have been rounded to the nearest 10.

** Business activities include real estate, renting, business related services (e.g. legal, accounting, management consultancy) and R&D; computing activities are not included.

Table 6 presents employment in manufacturing by technology intensity type for quarter 4 2013.¹⁵ Of the almost 216,000 persons employed in manufacturing in the State in quarter 4 2013, almost one fifth (19%) was in the South-West region, 17% was in Dublin, 13% was in the West region, and 12% each was in the Mid-East and South-East. Only 6% of national manufacturing employment was in the Midland region.

Regarding the composition of manufacturing within regions, the Dublin region had the highest share of high tech manufacturing, at 41%, followed by the South-West, at 36%. The lowest share of high tech manufacturing was in the Border region, at 10%. The West region had the highest number of persons employed in medium-high tech manufacturing (13,000), equivalent to 47% of the region's total manufacturing employment.

¹⁵ High tech manufacturing: pharmaceuticals and computer, electronic and optical products; medium-high tech manufacturing: chemicals, electrical equipment, machinery and equipment, motors and other transport equipment; medium-low tech manufacturing: coke/refined petroleum, rubber/plastics, non-metallic mineral products, basic metals and fabricated metal products; low-tech manufacturing: food and beverages, tobacco, textiles, wood, paper, furniture and printing.

Table 6. Employment in manufacturing by technology intensity, Q4 2013

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	2,300	15,200	8,500	2,300	5,000	5,100	14,400	4,000	56,900
Medium-high	4,500	3,100	2,800	2,500	4,700	3,300	6,900	13,000	40,700
Medium-low	3,800	3,100	3,100	3,300	5,200	3,400	5,500	2,400	29,900
Low tech	11,700	15,800	11,300	5,600	8,600	13,400	13,600	8,400	87,600
Total	22,400	37,200	25,700	13,700	23,500	25,200	40,400	27,800	215,900

Table 6a. Employment in manufacturing by technology intensity: composition within regions (%)

High tech	10%	41%	33%	17%	21%	20%	36%	14%	26%
Medium-high	20%	8%	11%	18%	20%	13%	17%	47%	19%
Medium-low	17%	8%	12%	24%	22%	13%	14%	9%	14%
Low tech	53%	42%	44%	41%	37%	53%	34%	30%	41%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 6b. Employment in manufacturing by technology intensity: composition across regions (%)

High tech	4%	27%	15%	4%	9%	9%	25%	7%	100%
Medium-high	11%	8%	7%	6%	12%	8%	17%	32%	100%
Medium-low	13%	10%	11%	11%	17%	11%	18%	8%	100%
Low tech	13%	18%	20%	6%	10%	15%	15%	9%	100%
Total	10%	17%	12%	6%	11%	12%	19%	13%	100%

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

Table 7a shows Gross Value Added (GVA) for each region and the State, both the total and per person, indices of GVA per person (at basic prices, relative to an average of 100 for the State), and the share that each region contributes to the State's total GVA. Output per person in relative terms (as measured by GVA at basic prices and expressed as an index relative to an average of 100 for the State) was the highest in Dublin, at 148 in 2011. The corresponding figure for the Midland region was just 55 - the lowest of all the NUTS 3 regions. Apart from Dublin, the South-West was the only region to exceed the State's average GVA per person - its index was 131. In 2011, the Dublin region accounted for 41% of the State's total GVA compared to just 3.4% for the Midland region.

Over the period 2010 to 2011, the relative performance, measured by the GVA index per person, declined in the Mid-East and Mid-West regions, it remained static in the Midland, Border and South-East regions, while it increased in the Dublin, South-West, and West regions.

Table 7a. Gross Value Added by region, per person (€), GVA indices, and the share of the State's total (2011 and 2010)

GVA	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Gross Value Added (GVA) at Basic Prices (Euro Million, 2011)	9,562	60,521	11,532	5,020	9,856	11,250	28,117	11,995	147,853
Gross Value Added (GVA) per person at Basic Prices (Euro), 2011	18,571	47,539	21,714	17,777	25,982	22,610	42,311	26,933	32,224
Indices of GVA per person at Basic Prices (State=100), 2011	58	148	67	55	81	70	131	84	100
Gross Value Added (GVA) at Basic Prices (%), 2011	6.5	40.9	7.8	3.4	6.7	7.6	19	8.1	100
Gross Value Added (GVA) at Basic Prices (Euro Million, 2010)	9,315	56,859	12,353	5,119	11,198	10,974	26,189	11,060	143,066
Gross Value Added (GVA) per person at Basic Prices (Euro), 2010	18,171	45,121	23,330	18,242	29,617	22,029	39,603	25,178	31,377
Indices of GVA per person at Basic Prices (State=100), 2010	57.9	143.8	74.4	58.1	94.4	70.2	126.2	80.2	100
Gross Value Added (GVA) at Basic Prices (%), 2010	6.5	39.7	8.6	3.6	7.8	7.7	18.3	7.7	100

Source: CSO StatBank, County Incomes and Regional Accounts

In 2011, the value of industrial output in Ireland was over €101 billion (Table 7b). As shown in Table 7c, of the total €101 billion, the South-West region accounted for 37% and Dublin accounted for 19%; in contrast, the Midland region accounted for the lowest share of the total value of Irish industrial gross output, at 3% (Table 7 b).

Table 7b. Gross output in industrial local units by region, 2011 (€ billion)

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Modern sector	1.2	14.0	4.1	0.7	3.6	5.8	25.5	3.9	58.8
Traditional sector	4.3	5.1	3.4	2.1	3.0	4.0	11.2	5.7	42.5
Industry total	5.5	19.2	7.5	2.7	6.6	9.8	36.7	9.6	101.3

Source: CSO (Census of Industrial Production)*

The value of industrial gross output in the modern sector was €58.8 billion in 2011 (Table 7b). Table 7c shows that two thirds of this value was produced in South-West and Dublin regions combined. The shares produced in the Border and Midland regions were the lowest, at 2% and 1% respectively.

Table 7c. Gross output in industrial local units by region, 2011 (%)

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Modern sector	2%	24%	7%	1%	6%	10%	43%	7%	100%
Traditional sector	11%	13%	9%	5%	8%	10%	29%	15%	100%
Industry total	6%	19%	8%	3%	7%	10%	37%	10%	100%

Source: CSO (Census of Industrial Production)*

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

Occupational employment

Table 8 presents regional employment by occupational group for quarter 4 2013. Of the approximately 1.9 million persons in employment in the State in quarter 4 2013, professionals accounted for the largest number (354,000, or 19%) followed by skilled tradespersons (304,500, or 16%). Of all those employed in professional occupations in the State, Dublin accounted for the largest share, at 37%. Similarly, Dublin accounted for 38% of all those employed in associate professional occupations. At 17% each, the South-West and Dublin regions accounted for the highest share of all those employed in skilled trades nationally.

Almost one half of those employed in the Dublin region were high skilled workers (managers, professionals and associate professionals) - the share was at least 30% in each of the other regions. In contrast, only 9% of those employed in Dublin were skilled tradespersons - the share was at least double that in each of the other regions, excluding the Mid-East.

Table 8. Regional employment by occupational group (000s), Q4 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	13.5	50.4	20.4	7.3	11.7	15.8	19.6	12.2	150.9
Professionals	28.4	131.3	41.6	17.2	25.6	30.6	47.8	31.4	354.0
Associate professionals	16	84.3	28.1	11	14.8	18.3	29.6	18	220.1
Administrative and Secretarial	18.8	74.8	28	12.1	16.4	18.8	24.6	17.2	210.7
Skilled Trades	35.4	51.2	33.4	24.9	28.7	37.5	52.4	40.9	304.5
Caring, Leisure and Other Service	15.6	37.1	18.2	8.7	11.6	17.9	24.6	13.9	147.5
Sales and Customer Services	16.5	47.3	17.7	8.1	12.2	16.9	26.8	14.9	160.4
Operatives	18.6	28.4	15.4	9.9	13.6	15.8	24.2	17.2	143.0
Elementary Occupations	22.1	65.4	22.5	11.8	16	25.2	29.8	19.7	212.5
Total	184.8	570.1	225.4	110.9	150.7	196.8	279.4	185.4	1,903.7*

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

* The 'not stated/other' category was excluded from this analysis (this category totalled 6,000 respondents in the State).

Inter-regional employment/residence

The employment data outlined thus far has been based on where a person resides, rather than where a person works. For some regions, where a person lives and where they work can vary (Table 9). This is most evident in the Mid-East region where 41% of workers who reside in the region were employed elsewhere - primarily in Dublin. Conversely, in the case of the South-West region, 94% of the workers who lived in the region were also employed there; the corresponding figure for Dublin was 93%.

Table 9. Region of employment by region of residence, Q4 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Employed in same region	81%	93%	52%	72%	88%	84%	94%	86%	84%
Employed elsewhere	9%	4%	41%	22%	6%	9%	2%	8%	11%
No Answer	10%	3%	7%	6%	6%	7%	4%	6%	5%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

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

Vacancies

Although considerably below the peak in 2007, vacancies continued to arise throughout 2013. During the year, there were just over 64,000 vacancies advertised on the DSP Jobs Ireland internet portal (Table 10). Of these, the highest numbers nationally were for elementary, personal services and associate professional occupations. Dublin had 25,000 vacancies advertised and the highest number of vacancies across all occupational groups. Dublin accounted for 39% of all vacancies, the South East region for 14%, while the Midland and Mid-West each accounted for just 6% (approximately 3,500 and 4,100 vacancies respectively).

Although the highest number of vacancies was advertised for the Dublin region, the distributions of vacancies by occupational group did not vary significantly across regions, with most vacancies advertised for elementary, personal services and associate professional (mainly sales) occupations, and comparatively few for managers, professionals, admin/secretarial and operatives. This could be due to an occupational bias in advertising, as many employers advertise vacancies for higher skilled occupations through channels other than DSP Jobs Ireland.¹⁶

Table 10. Number of vacancies by occupational group and region, 2013

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	109	486	114	57	67	87	235	122	1,277
Professionals	344	1,384	395	173	250	175	529	255	3,505
Associate professionals	881	3,592	1,039	451	648	1,218	1,303	655	9,787
Administrative and Secretarial	326	1,492	300	144	243	215	476	194	3,390
Skilled Trades	803	2,285	1,068	586	601	706	1,418	663	8,130
Caring, Leisure and Other Service	1,003	5,412	1,290	573	619	676	1,053	846	11,472
Sales and Customer Services	746	3,257	508	437	435	607	1,038	561	7,589
Operatives	441	1,608	588	368	323	489	525	297	4,639
Elementary Occupations	1,074	5,477	1,403	742	885	1,429	2,296	1,051	14,357
Total	5,727	24,993	6,705	3,531	4,071	5,602	8,873	4,644	64,146

Source: DSP Jobs Ireland database

Sourcing from outside the European Economic Area (EEA)

The data on new employment permits issued to non-EEA workers in 2013 shows that some vacancies continue to prove difficult to fill from the Irish labour supply.¹⁷ There were approximately 3,000 new employment permits issued to non-EEA workers in 2013 (Table 11). New employment permits were issued in all regions, although the majority were issued in Dublin (approximately 1,900 or 63%) - particularly for professional

¹⁶ The distributions of vacancies advertised through DSP Jobs Ireland are skewed towards skilled trades, caring/leisure services and elementary occupations. On the other hand, vacancies advertised through IrishJobs.ie (a private online advertising service) are skewed towards managerial, professional and associate professional occupations. In 2013, vacancies for professional occupations accounted for 5% of all vacancies advertised through DSP Jobs Ireland compared to 31% of all vacancies advertised through IrishJobs.ie. The number of vacancies advertised through DSP Jobs Ireland in 2013 was over double the number advertised through IrishJobs.ie (i.e. on average 5,300 vacancies per month compared to 2,300 per month respectively).

¹⁷ When interpreting employment permit data, it should be noted that the number of work permits issued for most occupations represents an over-estimation of the true annual inflow of non-EEA workers into the Irish labour market because not all new employment permits are issued to first time applicants; for instance, when an employment permit holder is made redundant, or moves to a new employer, a new permit is issued rather than the old permit being renewed.

occupations. For all other regions, the numbers issued were relatively small, particularly for non-professional occupations.

Table 11. Number of employment permits by occupation and region, 2013

Occupation	Border	Dublin	Mid-East	Midland	Mid-West*	South-East	South-West	West	Total
Managers	5	147	9	1	8	8	12	4	194
Professionals	58	1,159	127	121	70	27	178	116	1,856
Associate professionals	11	397	25	9	16	11	49	25	543
Administrative and Secretarial	-	29	1	-	1	-	3	-	34
Skilled Trades	4	50	29	11	10	1	12	10	127
Caring, Leisure and Other Services	4	21	15	4	7	2	9	8	70
Sales and Customer Services	12	23	2	-	2	1	7	1	48
Operatives	2	4	7	1	3	5	-	2	24
Elementary Occupations	6	84	6	2	9	7	15	5	134
Total	102	1,914	221	149	126	62	285	171	3,030

Source: DJEI

*Note: Figures do not include a small number of new work permits for which a NUTS 3 region was, for various reasons, not assignable.

Replacement demand

Notwithstanding the continuing challenges impinging on Ireland's economy, job opportunities continue to arise - there were almost 61,000 net jobs created between quarter 4 2012 and quarter 4 2013. However, while there will be considerable job opportunities in the short term, many of them will be due to replacement demand - labour market demand arising from retirements and other exits from employment (excluding vacancies arising from turnover within an occupation). Based on the employment levels in quarter 4 2013 and a conservative annual replacement rate of 2%, it is estimated that the employment opportunities arising from replacement demand will be approximately 38,000 annually (Table 12).¹⁸ Employment opportunities will arise in all regions and across all occupational groups.

In the National Skills Bulletin 2014, replacement rates were estimated for occupations based on identifying the number of transitions from employment to inactivity (e.g. retirement, home duties, study, etc.) and net losses from inter-occupational movements. The analysis confirmed that some occupations are characterised by relatively higher replacement rates, namely elementary (farm, construction, security, cleaning, storage), some clerical (e.g. general admin), some operatives (e.g. food) and personal services occupations (care workers, child-minders). On the other hand, some occupations are characterised by below average replacement rates, namely: managers, professionals, associate professionals, and skilled trades.

¹⁸The annual replacement rate varies according to occupation; for example, it may be as low as 2.5% for professional occupations or up to 3.9% for labourers (FÁS/ESRI *Manpower Forecasting Studies. Report No. 9. Estimating Labour Force Flows, Job Openings and Human Resource Requirements*. April 2001). During a recession, replacement rates are likely to be lower and therefore a conservative estimate of 2% was used here.

The labour market transitions analysis showed that in 2013 transitions to inactivity were mostly due to retirement, education or home duties.¹⁹ For some occupations, the share exiting due to retirement was large (e.g. farmers, nurses, teachers and managers in general), while it was small for other occupations (e.g. sales occupations); the share of exits to education was greater for lower skilled occupations (e.g. sales and elementary occupations), while the share of exits to home duties was the highest for clerical and personal services occupations.

Table 12. Estimated* replacement demand by occupational group and region, based on Q4 2013

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	300	1,000	400	100	200	300	400	200	3,000
Professionals	600	2,600	800	300	500	600	1,000	600	7,100
Associate professionals	300	1,700	600	200	300	400	600	400	4,400
Administrative & Secretarial	400	1,500	600	200	300	400	500	300	4,200
Skilled Trades	700	1,000	700	500	600	800	1,000	800	6,100
Caring/Leisure	300	700	400	200	200	400	500	300	3,000
Sales & Customer Service	300	900	400	200	200	300	500	300	3,200
Operatives	400	600	300	200	300	300	500	300	2,900
Elementary occupations	400	1,300	500	200	300	500	600	400	4,300
Total	3,700	11,400	4,500	2,200	3,000	3,900	5,600	3,700	38,100

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

* Note: Estimates are based on a 2% annual replacement rate and Q4 2013 employment levels for nine occupational groups (excluding the 'not stated' category).

Table 13 shows the share of persons in employment in an occupation who exited employment in 2013. The share of exits was particularly high for elementary occupations, especially for those where seasonality is an issue (e.g. bar staff, waiters and agricultural labourers), personal services (e.g. childminders, care workers) and sales occupations (e.g. sales assistants). While the analysis was conducted at a national level, these patterns in exits from employment by occupation are a useful reference for examining replacement demand at regional level. The analysis of labour market transitions in 2013 estimated that the probability of transitioning from unemployment to employment increased by two percentage points, to 12% in 2013, compared to 2012. Consistent with the above, there were more transitions into employment in 2013 than in 2012. Specifically, there were approximately 135,000 movements from unemployment into employment, and approximately 155,000 transitions from inactivity into employment.

¹⁹ National Skills Bulletin 2014, SOLAS (SLMRU).

Table 13. Exits to inactivity from employment for occupations with the highest number of transitions to inactivity, 2013

Exits to inactivity					
Occupation/occupational group	No. of exits	Share (%) of employment	Occupation/occupational group	No. of exits	Share (%) of employment
Sales assistants	16,500	14%	Primary school teachers	1,700	4%
Care workers	7,900	16%	Elementary storage	1,600	8%
Elementary construction	5,200	17%	Assemblers	1,600	10%
Waiters	4,700	19%	Secondary school teachers	1,600	5%
Farmers	4,600	6%	Taxi drivers	1,600	8%
General admin	4,400	8%	Business sales executives	1,300	5%
Cleaners	4,200	12%	Painters	1,200	22%
Catering assistants	3,100	14%	Construction operative	1,200	18%
Bar staff	2,800	15%	Sport coaches	1,100	34%
Childminders	2,700	16%	Hairdressers	1,100	5%
Farm workers	2,400	32%	Accountants	1,100	3%
Nurses	2,300	4%	Bus drivers	1,000	14%
Bank clerks	2,200	12%	Fitters	1,000	5%
Functional managers	1,700	4%	Security guards	1,000	9%

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

Employment growth - trends and expected expansion demand

Employment trends by sector are often used to indicate expected future employment growth. Therefore, in this section, we examine employment change by sector over the period quarter 1 2008 to quarter 4 2013. Quarter 1 2008 was chosen as employment levels in most regions were at, or close to their peak levels at that time. In addition, the most recent employment change between quarter 4 2012 and quarter 4 2013 is examined.

Employment change 2008-2013

Between quarter 1 2008 and quarter 4 2013, employment in Ireland decreased by approximately 236,600 (Table 14). Over this period, employment declined in each region, with the most pronounced decreases, in absolute terms, recorded in the Dublin, Border, South-West and Mid-East regions, at 64,000, 33,000, 30,000 and 29,000 respectively. The smallest decline was recorded in the Midland region over this period, where employment declined by approximately 14,000. In relative terms, the greatest decline was recorded in the Border region (-15%) while the smallest decline was recorded in the West region.

Despite the overall decline in employment nationally, employment in information and communication activities expanded by just over 10,000; education grew by approximately 7,500, accommodation and food and professional services by approximately 3,500 each, and health and social work by just over 27,500; combined, Dublin and the South-West accounted for almost half of all growth in the health sector. The greatest decline in employment over the period, in absolute terms, was recorded in construction - approximately 152,000. Indeed, construction accounted for at least 55% of the fall in employment in each region; it accounted for 85% of the fall in the West region - the highest share within the regions.

Table 14. Employment change by sector and region (000s), Q1 2008 - Q4 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture, forestry and fishing	*	2.3	-6.1	2.5	-2.0	*	2.0	*	*
Industry	-5.8	-14.7	-6.6	-3.5	-4.0	-6.7	-3.0	3.8	-40.5
Construction	-20.3	-35.4	-17.4	-9.8	-13.0	-18.9	-21.2	-16.1	-152.2
Wholesale and retail trade; repair of motor vehicles and motorcycles	-2.7	-18.4	-3.6	*	-7.1	-6.0	-3.7	-4.1	-49.2
Transportation and storage	*	-1.7	1.6	-1.0	*	-1.7	-1.3	*	-5.2
Accommodation and food service activities	-1.6	8.1	*	-1.9	*	1.2	-3.2	*	3.4
Information and communication	*	7.2	*	*	*	*	1.1	1.7	10.3
Financial, insurance and real estate activities	-2.0	-8.2	1.0	*	*	2.2	-1.9	*	-7.6
Professional, scientific and technical activities	*	1.4	*	*	*	*	*	1.5	3.5
Administrative and support service activities	-3.2	-9.4	*	-1.1	-1.8	-1.7	*	*	-18.6
Public administration and defence; compulsory social security	*	-1.8	-1.8	*	*	*	-2.4	-3.1	-8.4
Education	1.0	3.3	*	*	1.1	2.4	*	*	7.2
Human health and social work activities	1.6	6.3	4.6	4.6	1.9	4.3	6.1	-1.8	27.6
Other NACE activities	-2.1	-3.1	*	*	2.1	-1.9	*	-2.2	-8.5
Total	-32.9	-64.2	-28.7	-14.1	-21.9	-26.1	-29.6	-18.9	-236.6

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

* Estimates for number of persons employed are too small for reliable statistical inference.

Employment change 2012-2013

Over the period quarter 4 2012 and quarter 4 2013, total national employment expanded by 61,000. Employment increased across all regions, although the expansion was negligible in the Mid-East region and very modest in the Mid-West region. The most pronounced increases, in absolute terms, were recorded in the Dublin and South-East regions, at approximately 16,000 and 15,000 respectively. In relative terms, the strongest increases were recorded in the South-East and Border regions, at 8% each. (Table 15)

In terms of sectors, agriculture recorded the largest employment increase nationally (almost 27,000). Employment in this sector expanded particularly strongly, in absolute terms, in the South-West, West, Midland and South-East regions.²⁰ Employment in accommodation and food services and professional services also expanded strongly, by almost 17,500 and 13,000 respectively. While the Dublin region accounted for over 70% of the expansion in employment in food and accommodation services nationally, the expansion in employment in professional services was more evenly distributed across the regions. The information and communication (ICT) sector expanded by 11% in the Dublin region, even though it effectively remained static at the national level; in the Mid-East region, the ICT sector contracted.²¹

²⁰ Estimates of employment in agriculture have been shown to be sensitive to sample changes over time, and employment growth rates in this sector should be interpreted with caution.

²¹ While the data points to a decline in the ICT employment in the Mid-East region (especially in telecommunications, computer programming and consultancy and related activities) it needs to be borne in mind that in the Mid-East region 41% of workers who reside in the region were employed elsewhere - primarily in Dublin (Table 9); hence the above apparent decline can be in part explained by the possibility that some of the contraction observed for the region actually occurred in Dublin and affected the commuting workers employed in the ICT sector.

Table 15. Employment change by sector and region (000s), Q4 2012 - Q4 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture, forestry and fishing	1.7	2.0	*	4.9	1.4	4.3	6.3	6.3	26.8
Industry	*	*	4.3	*	3.0	-3.1	1.0	1.3	6.4
Construction	*	3.3	-1.3	1.5	-1.9	*	-1.3	*	*
Wholesale and retail trade; repair of motor vehicles and motorcycles	5.4	-2.6	-2.5	-1.4	-3.5	2.9	-1.6	*	-3.0
Transportation and storage	*	*	2.1	*	*	*	-1.2	*	*
Accommodation and food service activities	*	12.3	1.4	*	*	*	*	1.6	17.4
Information and communication	*	4.4	-4.5	*	*	*	1.3	-1.4	*
Financial, insurance and real estate activities	*	-4.7	*	*	-1.3	1.7	-1.2	*	-5.7
Professional, scientific and technical activities	1.9	2.6	1.6	1.8	*	2.0	*	3.2	13.0
Administrative and support service activities	*	*	1.5	-1.1	*	*	1.1	*	1.3
Public administration and defence; compulsory social security	*	1.2	-1.8	*	*	*	-1.2	*	-1.0
Education	1.8	1.7	-2.4	*	*	1.3	*	-1.5	1.6
Human health and social work activities	-1.3	-2.2	2.1	1.1	*	4.7	*	-1.7	3.9
Other NACE activities **	*	-1.6	*	*	1.6	*	*	-1.1	*
Total	14.3	15.8	*	5.4	1.2	15.3	3.6	5.0	61.0

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

* Estimates for number of persons in a cell are too small to be considered reliable; ** Other NACE activities include the residual category where no specific NACE sector could be assigned.

Employment outlook by occupation

Table 16 presents a list of occupations with higher than average medium term employment growth prospects. It indicates the occupations for which job opportunities are expected to be relatively more plentiful. The numbers employed in each occupation are provided to contextualise the relative magnitude of job opportunities which may arise through potential replacement and expansion demand. The share of third level graduates currently employed in these occupations serves as a guide for the level of education and training provision required for these occupations. A broad indication of unemployment (i.e. whether above or below the national average) is given where numbers are sufficiently large. The employment growth prospects are based on an assumed optimistic recovery scenario, and any issues such as a delayed recovery in the EU and/or issues with credit flow in the Irish economy will result in less favourable growth rates, and in turn less favourable employment prospects.

Table 16. Selected occupations with positive labour market outlook, Ireland (2013)

Occupation	Number Employed (2013)*	% 3rd Level Graduates	Unemployment	Employment growth prospects
Functional managers & directors	48,200	59%	Below average	Above average
Advertising, marketing & sales directors	5,400	72%	n/a	Above average
Human resource managers	4,600	89%	n/a	Above average
ICT specialist & project managers	16,500	83%	n/a	Above average
Financial institution managers & directors	5,200	86%	n/a	Above average
Managers & directors in transport & logistics	6,700	31%	n/a	Above average
Managers & directors in retail & wholesale	14,000	45%	Below average	Above average
Restaurant managers	5,800	43%	n/a	Above average
Managers & proprietors in other services	26,600	43%	Below average	Above average
Production, process, design & development engineers	4,200	94%	n/a	Above average
IT Business analysts & systems designers	3,300	87%	n/a	Above average
Programmers & software developers	16,400	94%	Below average	Above average
ICT professionals n.e.c.	8,100	90%	n/a	Above average
Legal professionals	11,000	98%	n/a	Above average
Accountants & tax experts	38,300	97%	Below average	Above average
Mgt. consultants, business analysts & project managers	8,000	88%	n/a	Above average
Actuaries, economists & statisticians; other business professionals	8,100	90%	n/a	Above average
Media professionals	5,200	91%	n/a	Above average
Electrical, electronic & engineering technicians	5,500	76%	n/a	Above average
Process & quality assurance technicians	4,400	62%	n/a	Above average
IT operations technicians	8,100	71%	n/a	Above average
IT user support technicians	3,000	81%	n/a	Above average
Sports & fitness occupations	7,700	68%	n/a	Above average
Brokers & insurance underwriters	3,900	70%	n/a	Above average
Finance & investment analysts	6,900	87%	n/a	Above average
Financial & accounting technicians	3,100	72%	n/a	Above average
Financial accounts managers	9,900	82%	n/a	Above average
Other business associate professionals	7,000	79%	n/a	Above average
Marketing associate professionals	5,800	78%	n/a	Above average
Sales accounts & business development managers	16,900	80%	n/a	Above average
Regulations inspectors; health & safety officers	3,600	84%	n/a	Above average
Financial administrative occupations	55,600	53%	Below average	Above average
Office managers & supervisors	7,200	57%	n/a	Above average
Metal machining, fitting & instrument making trades	25,200	30%	Below average	Above average
Electrical and electronic trades etc.	34,600	42%	Below average	Above average
Sales related occupations	12,000	43%	Below average	Above average
Sales supervisors	3,400	36%	n/a	Above average
Customer service occupations	17,100	54%	Below average	Above average
Road transport operatives/drivers	57,600	10%	Below average	Above average

Source: Analysis by SOLAS (SLMRU) based on CSO data and SOLAS/ESRI Occupational Employment Forecasts 2020

* Employment figures are reported as annual average figures for 2013 (i.e. the average of the four quarters in 2013).

Job announcements

Monitoring of recent job announcements in the media shows that job creation continued to occur. In 2013, the number of job creation announcements exceeded the number of job loss announcements. This trend continued during the first quarter of 2014. While there were job creation announcements across all regions, they were primarily concentrated in the Dublin region and, albeit to a lesser extent, the South-West.²² It should be borne in mind that announcements of job creation in the media are characterised by a certain lead-time and, consequently it may take a number of years for all the jobs to materialise.

Live Register

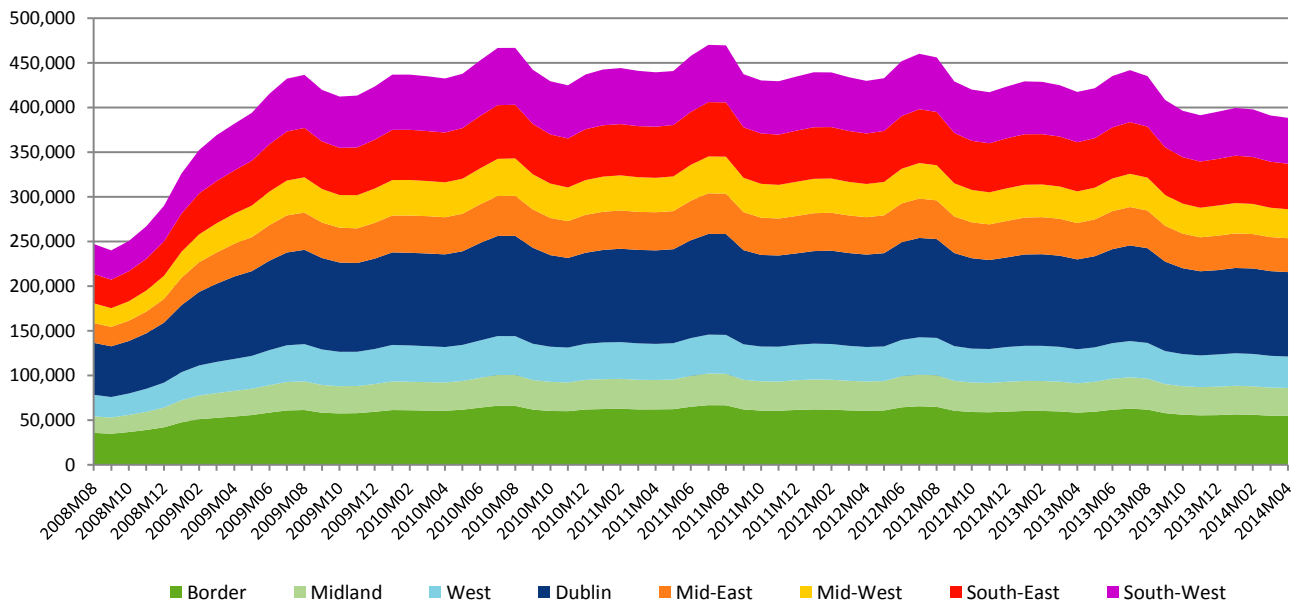
The Live Register is a monthly count of the number of persons under 65 years registering for Jobseekers Benefit or Allowance or various other statutory entitlements with the Department of Social Protection. Live Register statistics are compiled from administrative returns made to the CSO by each local office of the Department of Social Protection. Although the Live Register is not an official measure of unemployment, it is used as a short term indicator of unemployment. The Live Register is not specifically designed to measure unemployment - it includes persons who are working part-time and signing on part-time. In addition, a number of the unemployed are not on the Live Register because they were previously self-employed, have a spouse earning, or for other reasons. Live Register statistics are available at local social welfare office of registration - providing indicative movements in the number of unemployed persons at local level.

In April 2014, there were almost 388,600 persons on the Live Register, a decrease of approximately 29,000 (7%) compared to April 2013. In April 2014, almost one quarter of all those on the Live Register were located in the Dublin region. While the numbers on the Live Register declined in all regions over the same period, the most pronounced decline, in relative terms, was recorded in the South-West region - at 9%; the smallest decline was recorded in the Midland region, at 5%.

Despite these year-on-year declines in the numbers on the Live Register, the numbers remain at elevated levels compared to those recorded prior to the downturn in the economy (Figure 1). It should be borne in mind that there is pronounced seasonality in the numbers signing on the Live Register in each region each year, with the numbers increasing (by approximately 5%) during the summer months and declining in September.

²² The focus is on the job announcements made in the first half of 2014, while some from Q4 2013 deemed relevant are also included. It should be borne in mind that job announcements are characterised by a certain lead-time and, by definition, carry forward; for example, job announcements made in Q4 2013 can materialise during that period, but can also come on stream over the period of more than one year.

Figure 1. Persons on Live Register by region, August 2008-April 2014



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

The age distributions of persons on the Live Register were broadly similar across regions in April 2014. The share of persons aged under 25 on the Live Register ranged between 13% and 16% in each region, with the highest share in the Midland region (16%) and the lowest share in the South-West region (13%). (Table 17a, Table 17b).

Table 17a. Live Register by age group and region, April 2014

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	8,426	14,267	5,386	5,101	4,851	7,719	6,649	4,849	57,248
25 years and over	46,476	80,262	32,507	26,148	27,622	43,235	44,732	30,329	331,311
Total	54,902	94,529	37,893	31,249	32,473	50,954	51,381	35,178	388,559

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

Table 17b. Distribution of Live Register by age group and region (%), April 2014

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	15%	15%	14%	16%	15%	15%	13%	14%	15%
25 years and over	85%	85%	86%	84%	85%	85%	87%	86%	85%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

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

In April 2014, the gender distributions of persons on the Live Register were broadly similar in each region, with males accounting for 62% of all registrants (Table 18). Within the regions, the highest share of males was in Dublin (64%) while the lowest shares were in the Mid-East and West regions, at 60% each. Compared to a year ago, the number of males and females declined in all regions (excluding the Midland region for females, where their share increased marginally).

Table 18. Number of persons on the Live Register by gender and region, April 2014

Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	33,584	60,143	22,723	18,973	19,842	31,581	31,531	21,164	239,541
Female	21,318	34,386	15,170	12,276	12,631	19,373	19,850	14,104	149,018
Total	54,902	94,529	37,893	31,249	32,473	50,954	51,381	35,178	388,559

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

Official unemployment (ILO definition)

The official measure of unemployment is provided by the CSO in the Quarterly National Household Survey (QNHS) and it is based on the ILO definition of unemployment. While Live Register data is frequently used by commentators in discussions on unemployment, it is not specifically designed to measure unemployment.

Table 19 presents unemployment by sector and region for quarter 4 2013. Of the 184,000 unemployed persons who stated their previous sector of employment nationally, approximately 43,500 persons (25%) had previously been employed in the construction sector. Within each region, the number (and share) of unemployed persons previously employed in construction was higher than all other sectors - the share was the highest in the Border region, at 27%. At the same time, the share of the unemployed within each region who previously worked in industry and wholesale and retail was over 10% each - the share in industry was the highest in the Mid-East while the share in wholesale and retail was the highest in the South-East region.

Dublin accounted for a quarter (63,000 persons) of total national unemployment, although it had a lower than average unemployment rate of 10%. Dublin had the highest number of persons previously employed in construction and industry nationally; however, the share of the unemployed previously employed in these sectors in Dublin was relatively low. The Dublin region had the highest number of unemployed persons who were previously employed in financial, insurance and real estate activities - over half of the total number who previously worked in this sector nationally.

Table 19. Unemployment by sector and region, (000s) Q4 2013

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	State
Agriculture, forestry and fishing	*	*	*	*	*	1.0	1.1	*	4.2
Industry	3.3	5.4	4.3	1.8	2.0	2.9	3.2	2.1	24.9
Construction	5.8	8.3	6.2	2.9	3.3	6.7	6.1	4.2	43.6
Wholesale & retail; vehicle repair	3.7	6.4	2.9	2.1	2.2	5.0	3.1	2.8	28.2
Transportation and storage	*	1.6	1.3	*	*	1.0	*	*	6.0
Accommodation/food service	1.5	4.8	2.4	1.1	1.0	2.0	2.0	1.5	16.4
Information and communication	*	1.5	1.0	*	*	*	*	*	5.2
Financial, insurance & real estate	*	3.4	*	*	*	*	*	*	6.4
Prof., scientific & tech. activities	1.2	1.7	*	*	*	1.1	*	1.0	6.9
Admin. and support activities	*	3.1	*	*	*	*	1.2	1.0	8.8
PAD	*	*	*	*	*	*	*	*	2.5
Education	*	2.0	*	*	*	*	1.4	1.2	7.5
Human health and social work	1.8	3.1	1.2	1.2	*	1.7	1.5	1.3	12.7
Other NACE activities	1.0	3.5	1.5	*	*	1.3	1.5	*	10.7
No sector given	7.1	17.9	8.3	4.7	5.4	10.5	7.9	7.2	69.0
Total	29.0	63.2	32.2	17.6	18.2	36.2	31.8	25.0	253.2

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

* Estimates for number of persons in a cell are too small to be considered reliable.

Table 20 shows unemployment by occupational group and region. Just over one quarter of unemployed persons in the State did not state their previous occupation (reflecting, inter alia, the fact that some persons are looking for work for the first time - i.e. looking for their first job). Of the 184,000 unemployed persons who stated their previous occupation of employment, almost a quarter worked in skilled trades, while a fifth worked in elementary occupations.

Table 20. Unemployment by occupational group and region, (000s) Q4 2013

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Managers	1.0	2.2	1.4	*	0.2	1.2	1.2	1.1	8.6
Professionals	*	2.9	1.1	1.0	1.0	1.3	1.4	2.0	11.5
Associate professionals	1.7	4.7	2.0	*	*	1.5	1.6	1.8	14.5
Administrative & secretarial	2.0	5.9	2.3	0.8	1.1	2.0	1.5	1.5	17.2
Skilled trades	5.5	9.7	6.3	3.9	3.0	5.0	7.1	3.6	44.1
Caring/leisure	1.8	2.7	1.5	*	1.4	2.3	2.5	1.1	14.0
Sales & customer service	1.8	4.7	1.3	1.5	1.5	3.0	2.5	1.1	17.4
Operatives	3.1	3.1	2.8	1.7	1.7	3.8	1.4	2.3	20.0
Elementary occupations	4.2	9.2	5.0	3.0	2.1	5.4	4.7	3.2	36.9
No occupation**	6.9	18.2	8.5	4.6	5.4	10.6	7.9	7.2	69.1
Total	29.0	63.2	32.2	17.6	18.2	36.2	31.8	25.0	253.2

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

** Relates to other /not stated; the total figures depicted for each region therefore include this category.

Dublin accounted for the highest number of persons unemployed in each occupational grouping, with the exception of operatives. However, within the regions, the Midland region and the South-West region had the highest share of the unemployed previously employed in skilled trades (at 30% each); in addition, the Midland region also had the highest share of the unemployed who previously worked in elementary occupations.

Table 21 shows the distribution of unemployed persons by region and education level. The analysis focuses on the number of unemployed persons who stated their highest level of education achieved. The largest share of the unemployed in each region had attained higher secondary education, with the share ranging from 25% in the South-West to almost 40% in the Midland region. The share of the unemployed in the Dublin and West regions with third level qualifications was the highest, at almost 30% each. The corresponding figure was just 16% in the Midland region. The share of the unemployed in the Mid-East region with at most lower secondary education was the highest (at 31%) although Dublin had the largest number.

Table 21. Unemployment by education and region, (000s) Q4 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
No formal/primary	2.2	4.4	2.6	1.7	1.5	3.9	3.0	2.2	21.5
Lower secondary	4.6	8.4	7.4	2.8	3.5	6.1	5.1	3.9	41.8
Higher secondary	8.4	19.8	8.3	6.9	4.8	9.5	7.9	7.8	73.3
Post leaving cert	5.6	11.6	6.5	3.2	3.9	6.6	6.7	2.9	47.1
3 rd level non honours degree	3.2	6.5	3.0	1.0	1.3	4.5	3.6	3.5	26.8
3 rd level honours degree or above	3.8	11.3	4.0	1.8	2.0	4.1	4.6	3.9	35.5
Other/not stated	1.1	1.1	*	*	1.1	1.6	*	*	7.1
Total	29.0	63.2	32.2	17.6	18.2	36.2	31.8	25.0	253.2

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

Job seekers registered with the Public Employment Service (PES)

Table 22 presents data on the number of persons registered with the Public Employment Service (PES) who were seeking employment, in receipt of unemployment benefit/allowance (or credits), stated their previous occupation and who were ready to take up employment in May 2014. There was considerable consistency between the occupational distributions of job seekers and unemployment across the regions. Similar to the unemployment data, the highest share of jobseekers in each region had previously worked in skilled trades (ranging from 17% to 21%) or elementary occupations (ranging from 19% to 25%). The share of jobseekers previously employed as managers or in professional and caring occupations was relatively low in each region, at less than 10% each.

Reflecting the size of its labour market, Dublin accounted for one quarter of all job seekers registered with the PES nationally, while the Midland region accounted for only 6%. Dublin also had the highest share of relatively skilled job seekers - almost one fifth of all jobseekers in the region previously worked as professionals or associate professionals; the corresponding figure was 10% for the Midland region. In each region, the share of jobseekers previously employed in elementary occupations was between one fifth and one quarter - the share in the South-East was the highest, at 25%.

Table 22. Number of job seekers by occupational group and region, May 2014

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	288	1,067	418	159	226	330	324	283	3,095
Professionals	918	2,741	900	339	701	914	1,100	961	8,574
Associate professionals	1,685	5,302	1,797	730	1,266	1,749	1,941	1,538	16,008
Administrative & Secretarial	1,981	5,018	2,246	1,024	1,610	2,236	2,034	1,623	17,772
Skilled Trades	3,981	6,986	3,400	2,063	2,848	4,718	4,493	3,226	31,715
Caring/Leisure	1,576	2,608	1,262	927	1,132	1,767	1,641	1,142	12,055
Sales & Customer Service	1,574	3,829	1,530	970	1,209	1,953	1,831	1,251	14,147
Operatives	3,304	5,560	2,553	1,690	2,549	3,738	3,102	2,500	24,996
Elementary occupations	4,636	8,174	3,353	2,385	3,270	5,674	4,613	3,552	35,657
Other	40	113	36	38	30	46	124	38	465
Total	19,983	41,398	17,495	10,325	14,841	23,125	21,203	16,114	164,484

Source: DSP Client Database

Supply from education and training system

The data on numbers of students enrolled in education and training provides an indication of the expected output over the short to medium term. There were almost 272,700 students enrolled in higher education and further education and training courses in 2013 (Table 23). While there were considerable enrolments in all regions, the highest numbers (particularly at third level) were in the Dublin region. Dublin accounted for 56% of all national postgraduate enrolments and 40% of all national undergraduate enrolments. Further education and training enrolments were more evenly spread across the regions, although about one third were in the Dublin region. Dublin also accounted for one third (33%) of national FET certificates.

Notwithstanding recent improvements in retention rates in second level schools, early school leaving remains an issue of concern for the provision of FET at regional level; the early school leaving rate was above the national average in the South-East, Midland, and Border regions.²³

Table 23. Number of students engaged in education and training by region, 2013*

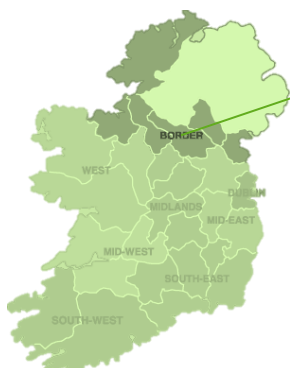
Region	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
FET (FÁS) Certificates	5,653	12,254	1,173	1,671	3,789	4,289	6,214	2,415	37,458
FET (PLC) Enrolments	4,554	12,001	2,094	1,350	2,671	3,767	6,255	2,858	35,550
Undergraduate Enrolments	12,167	65,315	7,594	4,332	17,168	12,490	26,282	18,500	163,848
Postgraduate Enrolments	815	20,071	1,912	436	3,274	1,119	4,721	3,483	35,831
Total	23,189	109,641	12,773	7,789	26,902	21,665	43,472	27,256	272,687

Source: DES, HEA, FÁS/SOLAS

* Higher education enrolments refer to the 2012/2013 academic year; PLC enrolments refer to the 2012/2013 academic year. FÁS certificates refer to the 2013 calendar year, and are a subset of all certificates issued.

²³ Early school leavers are defined as persons aged 18 to 24 whose highest level of education attained is lower secondary or below and who have not received education (either formal or non-formal) in the four weeks prior to the survey; (CSO, QNHS).

2. Border



Population	506,700
Working age (15-64)	319,200
Labour force	214,800
Employment	185,800
Unemployment	29,000
Employment rate	56.1%
Unemployment rate	13.5%
Participation rate	55.2%
GVA per person (€)	18,571
GVA per person (State = 100)	58.0

Employment by sector

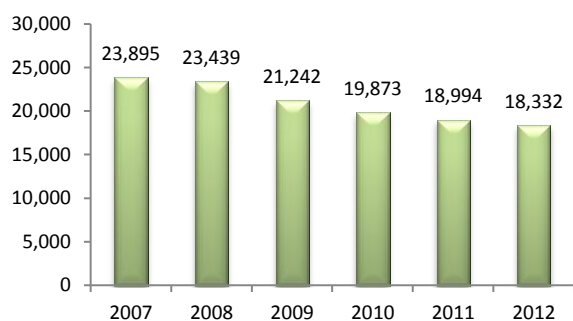
- In quarter 4 2013, the wholesale and retail and industry sectors were the largest employers, accounting for 16% and 13% of total employment in the Border region respectively
- The public sector (combining public administration and defence, health and education) employed 48,000 persons - accounting for approximately one quarter of the region's total employment
- Knowledge intensive services (market, high tech and financial services) employed almost 20,000 persons - accounting for 10% of the region's employment.

Figure 2.1 Employment by broad economic sector (Border), Q4 2013



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

Figure 2.2 Active enterprises: Business economy* (Border)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

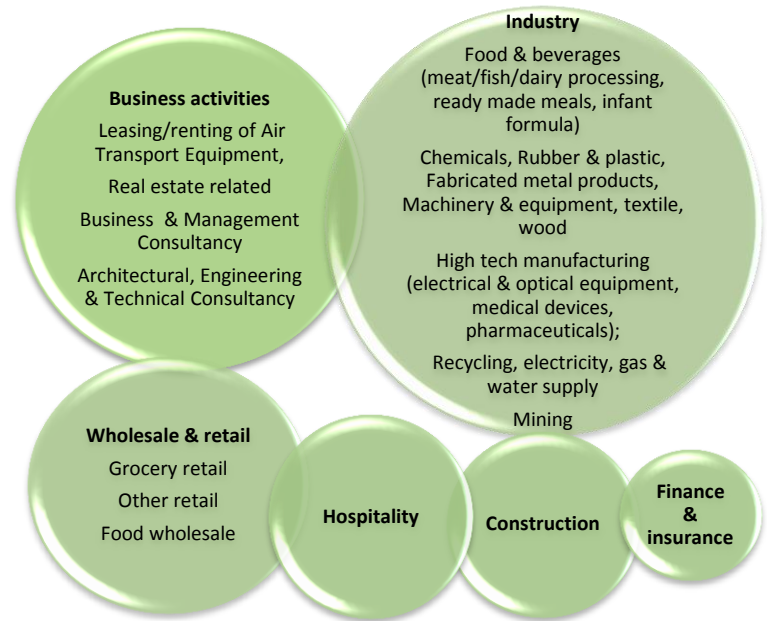
Active enterprises

- In 2012, there were approximately 18,300 active enterprises in the private business economy in the Border region - a 3.5% decline compared to 2011
- Between 2007 and 2012, the number of active enterprises declined by about 5,500 or 23% - the largest decline (in both absolute and relative terms) compared to all other regions
- Wholesale and retail had the largest number of enterprises (4,900), followed by construction (3,900); these sectors accounted for 27% and 21% of the total respectively
- Approximately 90% of active enterprises in the Border region were micro enterprises; only 0.1% were large enterprises (with 250 or more persons engaged).

Medium to large enterprises by sector

- Outside agriculture and the public sector, the highest number of medium to large enterprises (with 50 or more persons engaged) in the Border region is found in business activities, wholesale and retail, construction, hospitality, financial services, and industry (mostly in manufacturing, but also in mining and recycling, electricity, gas and water supply)
- Within manufacturing, there are a number of medium to large enterprises engaged in the manufacture of electrical and optical equipment, chemicals and fabricated metal products, machinery and associated equipment.

Figure 2.3 Sectors with largest enterprises (Border), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian Database

Figure 2.4a Industrial units (Border)

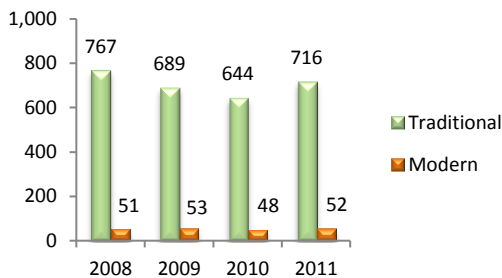
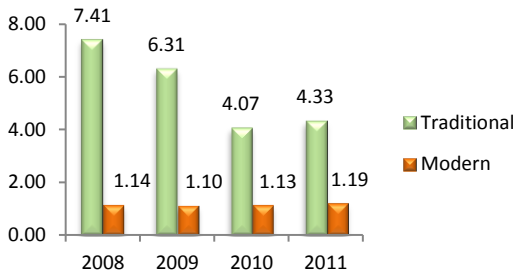


Figure 2.4b Gross output in industrial units (Border), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €18,571; GVA index (State =100): 58.0
- GVA (share, % of State's total): 6.5

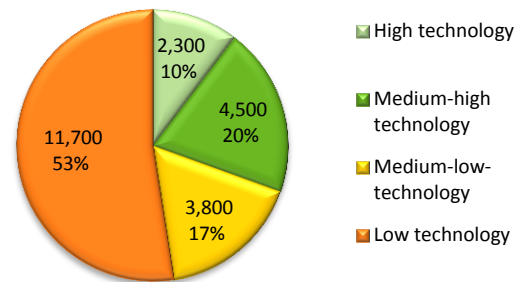
Industrial activity

- In 2011, 93% of all industrial units (manufacturing, energy and utilities combined) in the Border region were in the traditional sector
- The number of industrial units increased between 2010 and 2011 for both sectors of industry, the first increase observed for the traditional sector since 2008
- While less than 10% of industrial units were in the modern industry sector, they produced just over 22% of the regional gross industrial output value in 2011
- Between 2010 and 2011, there was a marginal increase in the value of gross output of industrial units in both sectors, with growth of 6% and 5% for the modern and traditional sectors respectively.

Manufacturing employment

- In quarter 4 2013, there were approximately 22,400 persons in the Border region employed in manufacturing
- Just over one half (11,700 persons) were employed in low-tech manufacturing (mostly in the food and beverage segment, which alone accounted for one third of total manufacturing employment); medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal, etc.) accounted for 17%; medium-high tech (e.g. chemicals, electrical, transport equipment, etc.) and high tech manufacturing (e.g. pharmaceuticals, electronics, optical products, etc.) combined accounted for 30%
- Apart from the South-East region, the Border region was the only region where low technology manufacturing exceeded 50% of total manufacturing employment; it also had the lowest share employed in high tech manufacturing.

Figure 2.5 Manufacturing employment (Border), Q4 2013



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

Figure 2.6 Employment by broad occupation (Border), Q4 2013 *



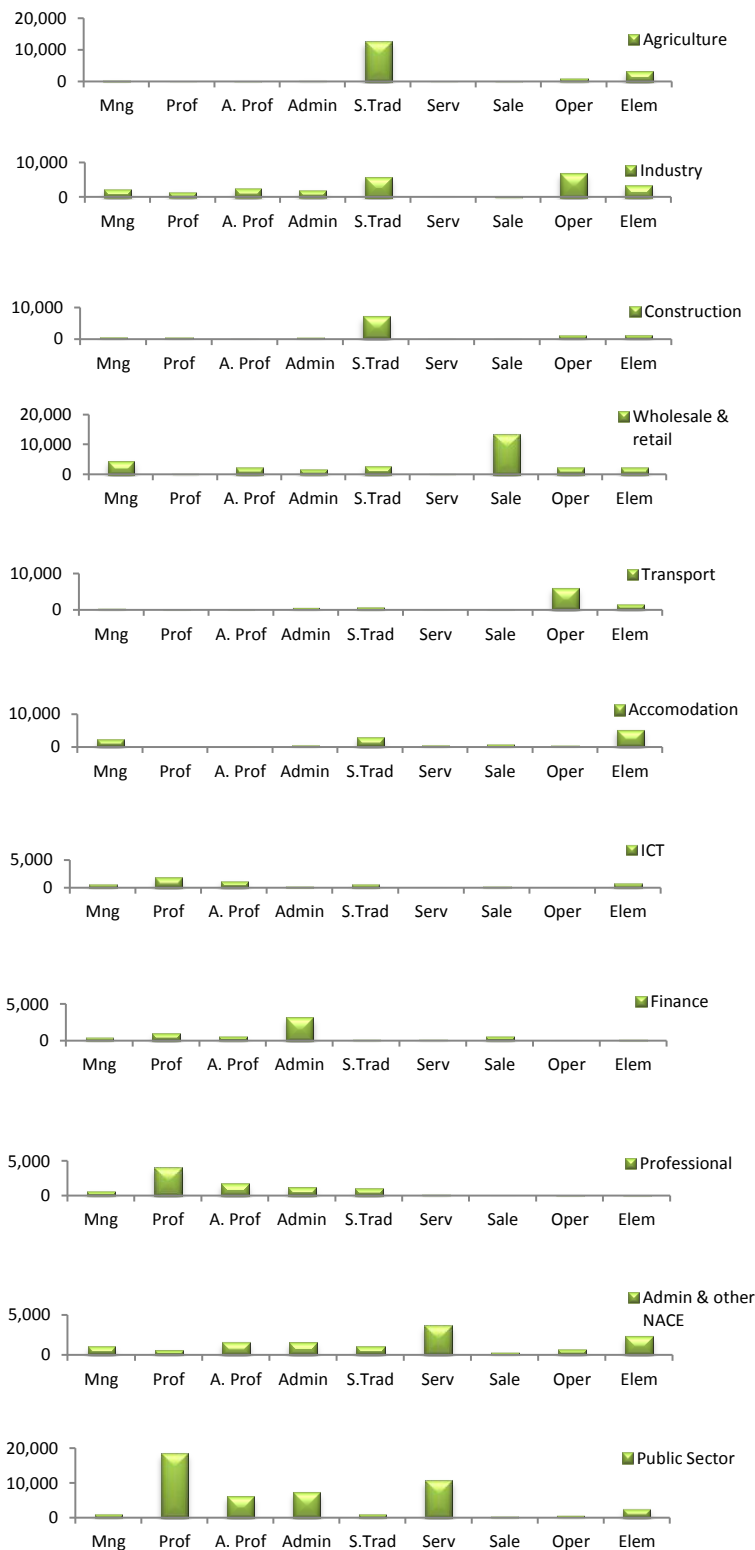
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Those whose occupation was not known/stated are not depicted.

Employment by occupation

- In quarter 4 2013, there were 35,400 persons employed in skilled trades occupations in the Border region - accounting for almost one fifth of total employment in the region; farmers accounted for almost one third of total employment within this occupational grouping
- One quarter or approximately 44,000 persons in the Border region were employed in professional and associate professional occupations (professionals accounted for 15% while associate professionals accounted for 9% of the total)
- One-in-eight of those employed in the Border were employed in elementary occupations, while one-in-ten were employed as operatives; 8% were employed in personal services occupations (e.g. caring, leisure and related services).

Figure 2.7 Employment by economic sector and occupation (Border), Q4 2013



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

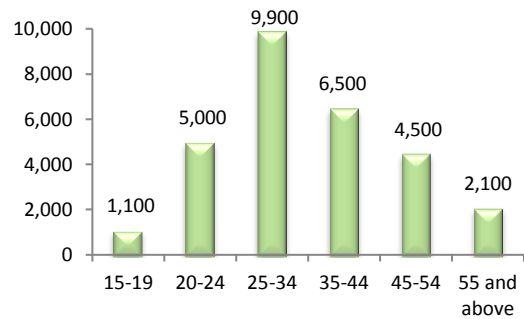
Employment by occupation and sector

- In quarter 4 2013, 28% of persons employed in industry were operatives (process, plant, etc.) - the largest occupational grouping; this was followed by almost one quarter in skilled trades, while only one-in-ten (10%) were associate professionals; within manufacturing (the largest segment of industry), high tech manufacturing had the highest share of professionals and associate professionals
- Low skilled persons (working in sales, operative or elementary occupations) dominated employment in three sectors: wholesale and retail, transport, and accommodation and food services
- Professionals and associate professionals made up the majority of those working in the public sector; employment in these two combined occupations also accounted for a large share of total employment in the professional services and ICT sectors
- Managers were more likely to be employed in wholesale and retail, accommodation and food sectors (proprietors); they were also well represented in the information and communication sector and industry
- Within occupational groups, the highest employment was in the following occupations:
 - **Managers:** functional managers, managers and directors, as well as proprietors, in wholesale and retail
 - **Professionals:** nurses and midwives, accountants
 - **Associate professionals:** business sales executives
 - **Administrative and secretarial:** government clerks, finance administrative occupations (e.g. bank and wages clerks, book keepers, wages and payroll, and generic administrative occupations)
 - **Skilled trades:** farmers, fitters (metal working and maintenance) mechanics, and carpenters and joiners
 - **Caring and services occupations:** child-minders, care workers/home carers
 - **Sales:** sales and retail assistants
 - **Operatives:** drivers, assemblers and routine operatives, and food processing operatives
 - **Elementary:** catering, bar and waiting staff, elementary storage occupations, cleaners.

Unemployment

- In quarter 4 2013, there were 29,000 unemployed persons in the Border region (defined in ILO terms); this was 5,000 fewer than a year ago; two thirds of those unemployed in the region were long term unemployed
- Age:** 21% of all unemployed persons in this region were younger than 25; at 29%, the youth unemployment rate for the region was above the average; those aged 25-34 accounted for almost one third of all those unemployed in the region
- Education:** almost one quarter of those unemployed in the Border had attained at most lower secondary education; almost one quarter had a third level qualification; one fifth had a technical or vocational qualification, including an advanced certificate or completed apprenticeship
- Sector:** one fifth of all unemployed persons had previously been employed in construction, with a further 13% in wholesale and retail, and 12% in industry
- Occupation:** the majority of unemployed persons in this region were previously employed in skilled trades (amounting to one fifth), followed by elementary occupations and operatives.

Figure 2.8 Unemployment by age (Border), Q4 2013



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

Figure 2.9 Unemployment: share by education (Border), Q4 2013

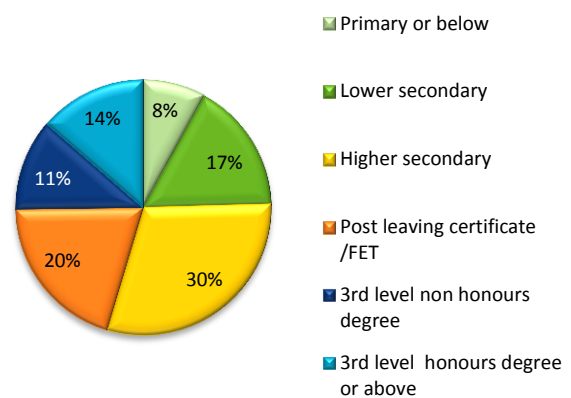


Figure 2.10a PES job seekers (Border), May 2014

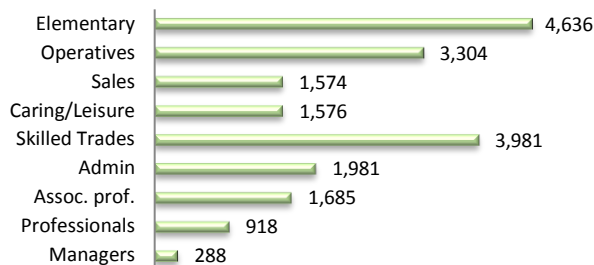
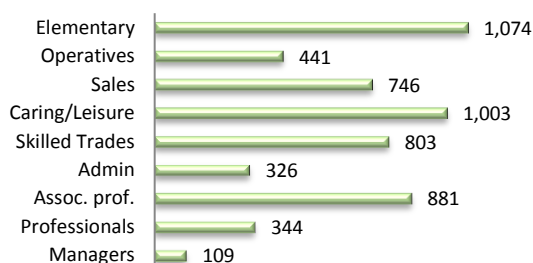


Figure 2.10b PES vacancies (Border), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

Source: Analysis by SOLAS (SLMRU) based on CSO

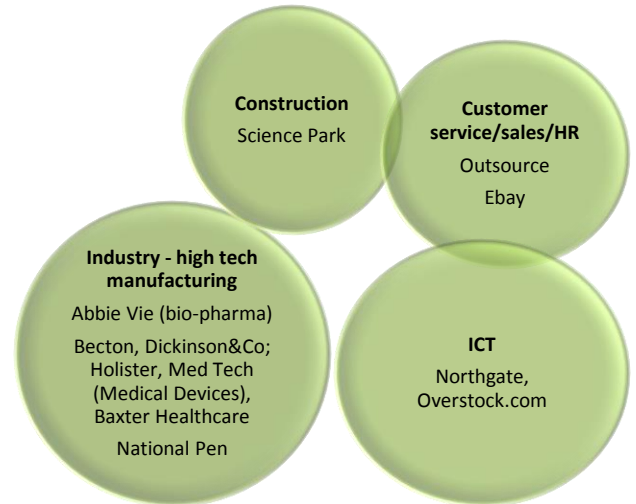
Live Register, PES job seekers and vacancies

- In April 2014, there were 54,900 persons on the Live Register in the Border region (a decline of 6% since April 2013); of these, 15% were younger than 25 years and 61% were male
- In May 2014, 19,900 job seekers were registered with the PES; the highest share (23%) had previously worked in elementary occupations (process plant and construction occupations), one fifth in skilled trades (carpenters, bricklayers, plasterers) and 17% as operatives
- In 2013, 5,727 vacancies were advertised through DSP Jobs Ireland in the Border region; the highest number of vacancies was in elementary (e.g. catering staff, cleaners and domestics, waiters) and caring (care workers, nursing assistants) occupations, followed by associate professional and technical occupations (business sales executives, IT user support technicians) and sales (collector salespersons, sales assistants).

Figure 2.11 Job creation announcements (Border), 2013 & 2014

Employment growth and job creation

- Over the period quarter 4 2012 to quarter 4 2013, employment increased by 8% in the Border region; employment expanded in wholesale and retail, professional services, agriculture and, to a lesser extent, in information and communication, and financial services
- Employment in industry and in the public sector remained largely static (within the latter, it declined in health, but increased in education)
- Employment remained static in construction; however regarding the pipeline for the residential segment of the sector, in 2013, there were 571 planning permissions granted, translating into 150,000 sq. metres, and amounting to 13% of the State's total floor area for which permissions were granted for houses
- Job announcements for the Border region suggest that job opportunities in the short to medium term are likely to arise in high tech industries (i.e. bio-pharma and medical devices); job creation in construction will continue to be linked with the expansion of CoLab (the Innovation Centre at Letterkenny IT - Science Park); also, a number of ICT jobs are anticipated in the short to medium term (e.g. Northgate).



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

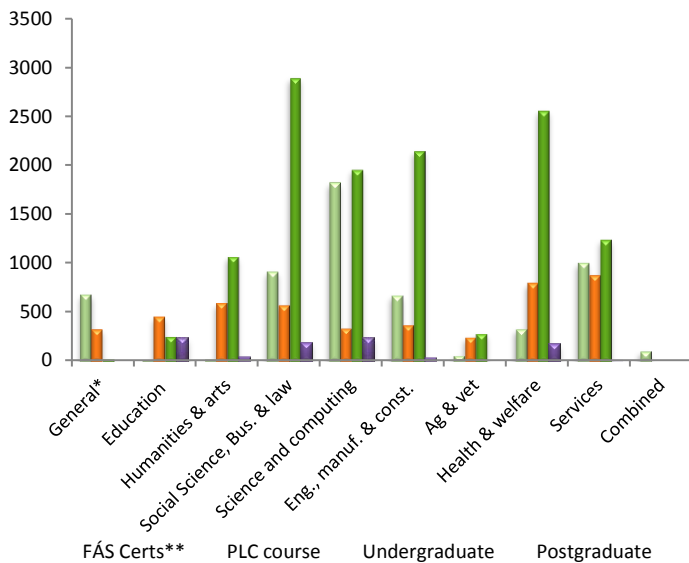
Education and training enrolments

In 2013, there were almost 23,200 learners and/or certificates in selected further/higher education and training; there were

- over 5,600 FÁS certificates: of these, almost a third were in science and computing, with a further fifth in services (e.g. tourism, sports and transport services)
- approximately 4,600 PLC enrolments: the two largest fields of learning were services (e.g. hairdressing, sport/recreation) and health and welfare, each accounted for just under a fifth of the total
- almost 12,200 undergraduate enrolments: more than a quarter were in social science, business and law; a further 20% were in health and welfare, while 17% were in science and computing
- over 800 postgraduate enrolments: 30% were in education with a further 20% each in the social science, business and law field and the health and welfare field.

Early school leavers from education and training: in quarter 4 2013, the ESL rate was 11% - which was above the rate of 8% for the State.

Figure 2.12 FÁS Certs, PLC course & higher education enrols (Border), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning
 ** FÁS certs refer to the 2013 calendar year, and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Census (2011)

Table 2.1. Labour force in the Border region by county, Census 2011

	Cavan	Donegal	Leitrim	Louth	Monaghan	Sligo	Total Border
At work	15%	29%	6%	24%	12%	14%	100%
Unemployed	13%	35%	6%	25%	11%	10%	100%

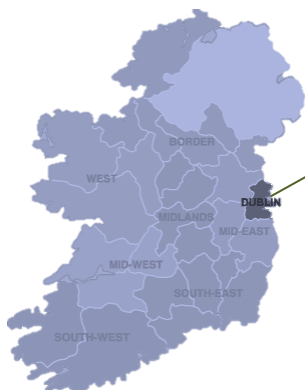
Source: CSO Census 2011

Table 2.1 shows Border employment by county in 2011. Donegal accounted for the largest share of employment in the Border region at 29%, followed by Louth at 24%; Leitrim accounted for 6% of Border employment.

Key points from the Census 2011 data include:

- Occupation:** No county attained the national average (39%) for high skilled occupations (managers, professionals and associate professionals combined). The lowest shares were for Monaghan and Cavan (these counties had high shares of persons employed as operatives). All counties excluding Louth had higher than average shares of persons in skilled trades.
- Sector:** Employment in agriculture in the Border region was higher than the national average; this was particularly the case in Cavan and Monaghan where employment in agriculture accounted for 12% of all employment (compared to 5% nationally). Employment in financial and professional activities and information and communication was lower than the national share across all counties.
- Education:** For persons at work, all counties had a higher share of persons with lower secondary education or less than the national average (18%), particularly Monaghan, Cavan and Donegal; all counties also had a lower than average share of persons at work with third level qualifications, particularly Cavan and Monaghan (38% nationally).
- Unemployment:** Those previously employed in construction accounted for a fifth of those unemployed in the Border region with the highest shares in Cavan, Donegal and Leitrim. Louth was the only county with a lower than average share of persons previously employed in this sector.

3. Dublin



Population	1,278,900
Working age (15-64)	870,100
Labour force	635,300
Employment	572,100
Unemployment	63,200
Employment rate	64.6%
Unemployment rate	10%
Participation rate	62.2%
GVA per person (€)	47,539
GVA p.p. index (State = 100)	148.0

Employment by sector

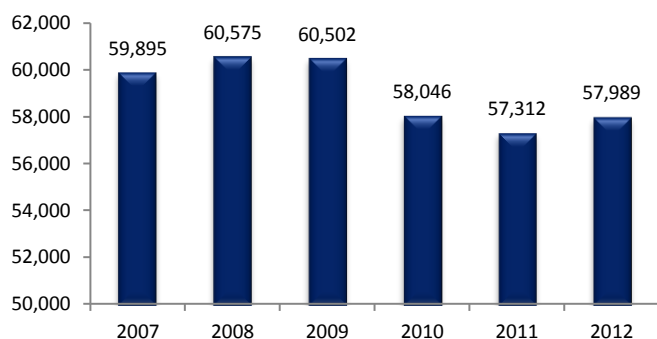
- In quarter 4 2013, the health and social work and wholesale and retail sectors were the largest employers in the Dublin region, with almost 77,000 and 76,000 persons respectively, each accounting for 13% of the region's total employment
- Employment in the public sector (health, education and public administration combined) accounted for 26% of total employment in the region
- Industry and ICT each employed over 43,000 persons, representing almost 8% of the region's employment; with almost 23,000 persons employed, construction accounted for 4% of employment
- Knowledge intensive services (market, high tech and financial) accounted for just above one quarter of total employment in Dublin, the highest share of all regions.

Figure 3.1 Employment by broad economic sector (Dublin), Q4 2013



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

Figure 3.2 Active enterprises: business economy* (Dublin)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

Active enterprises

- In 2012, there were almost 58,000 active enterprises in Dublin, accounting for 31% of the State's total number
- Between 2011 and 2012, the number of active enterprises increased by 1.2%; Dublin was the only region to record a year-on-year increase; despite this, the number remain almost 2,600 below the peak number recorded in 2008
- The largest number of active enterprises were in professional activities (13,100, or almost a quarter), followed by wholesale and retail (just over 11,000 or almost a fifth); one-in-ten enterprises were in the ICT sector, the highest share of all regions
- When compared to other regions, Dublin had the highest share of medium and large enterprises, and consequently the lowest share of micro enterprises.

Medium to large enterprises by sector

- The highest number of medium to large enterprises (employing at least 50 persons) in the Dublin region is found in a range of business activities, financial services and wholesale and retail
- There are also a considerable number of medium to large enterprises in industry, particularly in high technology manufacturing (e.g. pharmaceuticals, medical devices and computers), telecommunications and computing and related activities.

Figure 3.3 Sectors with largest enterprises (Dublin), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 3.4a Industrial units (Dublin)

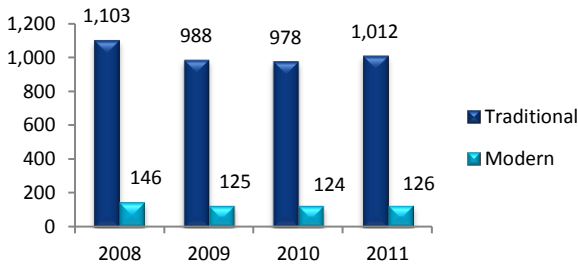
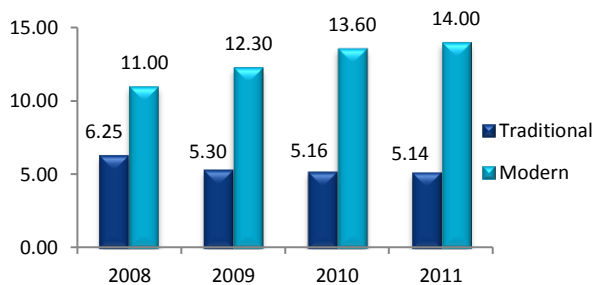


Figure 3.4b Gross output in industrial units (Dublin), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €47,539; GVA index (State =100): 148.0
- GVA (share, % of State's total): 41

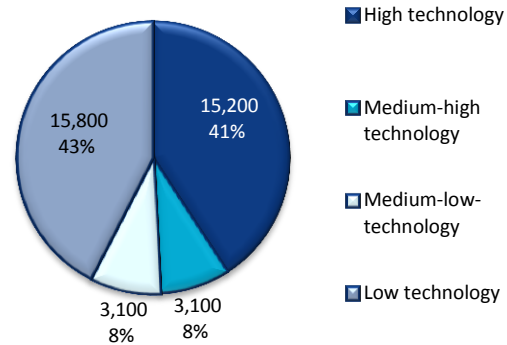
Industrial activity

- In 2011, 89% of all industrial units (manufacturing, energy and utilities) in the Dublin region were in the traditional sector
- The number of industrial units increased between 2010 and 2011, a change in the pattern of decline recorded in the previous two years
- While just over 10% of industrial units were concentrated in the modern industry sector, they accounted for 73% of the value of region's gross output in 2011
- The value of gross output in the modern sector increased from €13.6 billion in 2010 to €14 billion in 2011 while it remained relatively unchanged in the traditional sector.

Manufacturing employment

- In quarter 4 2013, 37,200 persons in the Dublin region were employed in manufacturing
- Almost 50% of manufacturing in this region was concentrated in high and medium-high technology manufacturing (41% and 8% respectively); the other half of manufacturing employment was found in medium-low technology manufacturing (8%) and low technology manufacturing (43%)
- Dublin was the only region where high technology manufacturing represented over 40% of the total regional manufacturing employment.

Figure 3.5 Manufacturing employment (Dublin), Q4 2013



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

Figure 3.6 Employment by broad occupation (Dublin), Q4 2013 *



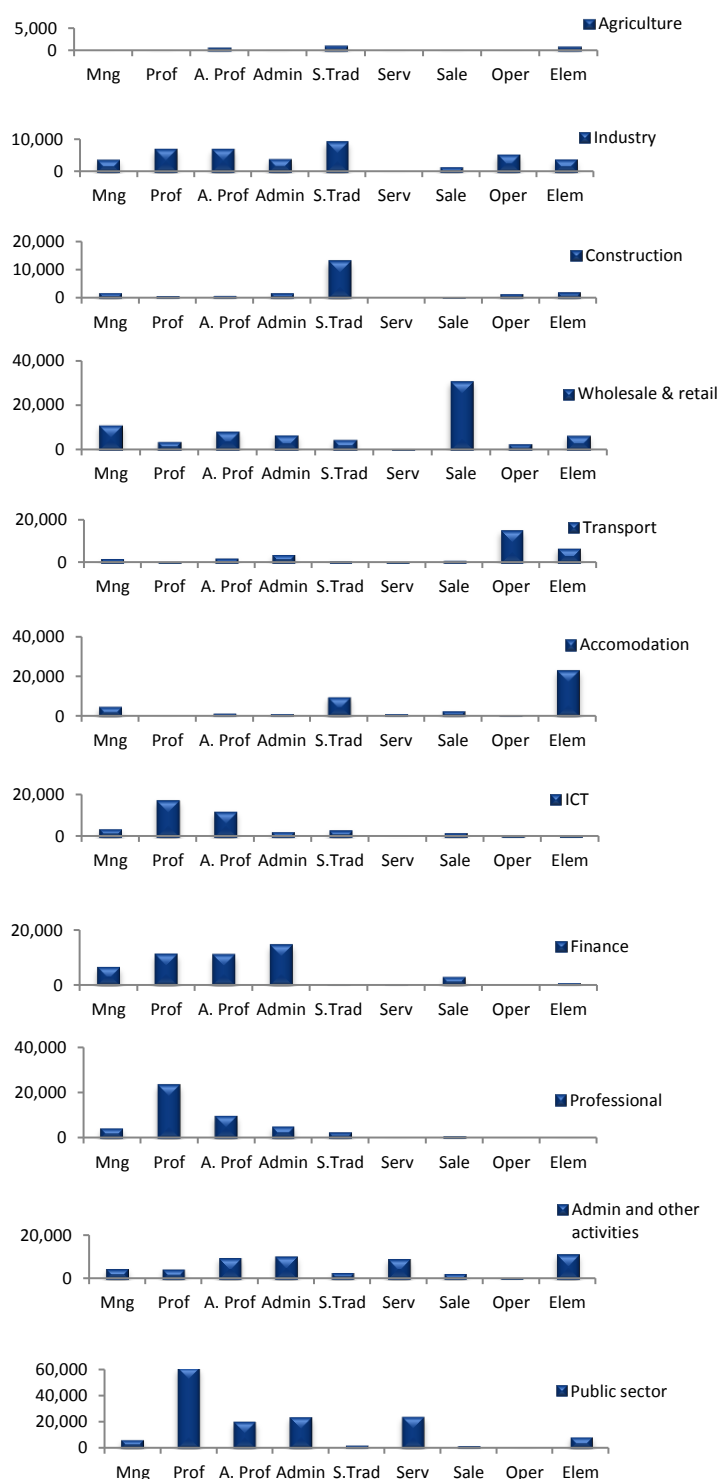
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Those whose occupation was not known/stated are not depicted

Employment by occupation

- In quarter 4 2013, approximately 131,000 persons in the Dublin region were employed in professional occupations, accounting for almost one quarter of the region's total employment - the highest share of all regions
- There were 84,300 working in associate professional and technical occupations, comprising 15% of total employment in Dublin
- In terms of lower skilled occupations, there were over 65,000 persons employed in elementary occupations and over 28,000 as operatives, accounting for 11% and 5% of the region's employment
- In excess of 51,000 persons worked in skilled trades and almost 75,000 persons worked in administrative occupations.

Figure 3.7 Employment by broad occupation and sector (Dublin, 000s) Q4 2013



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

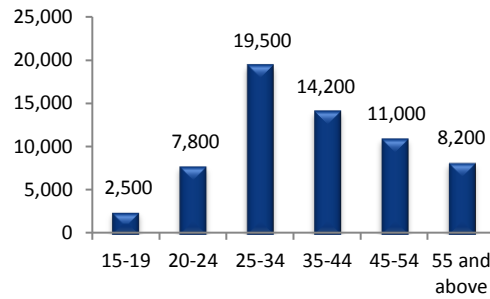
Employment by occupation and sector

- In quarter 4 2013, highly skilled workers (professionals and associate professionals) comprised the majority (seven-in-ten) of all persons employed in information and communication and professional services; they also accounted for more than one half of those working in the public sector (comprising health, education, and public administration and defence)
- Employment in industry was more evenly spread across occupations: with the exception of services occupations, employment in all other occupational groups each accounted for between 4% and 20% of total employment in the sector
- Those employed in low skilled occupations (i.e. elementary) accounted for one half of those working in accommodation and food services
- Employment in administrative occupations made up almost one third of all those employed in the financial sector
- Within occupational groups, the highest employment was found in the following occupations:
 - **Managers:** functional managers, financial and production managers, shopkeepers/proprietors
 - **Professionals:** IT professionals (programmers and software developers, IT project and specialist managers) teachers, nurses, medical practitioners, accountants, business analysts, and solicitors
 - **Associate professionals:** business sales executives, sales accounts and financial account managers, IT technicians, finance and investment analysts, police officers
 - **Admin/secretarial:** Government clerks, personal assistants, and finance admin occupations (e.g. bank and wages clerks)
 - **Skilled trades:** chefs, fitters, electricians and mechanics
 - **Services:** care workers, educational support assistants, hairdressers, child-minders
 - **Sales:** sales and retail assistants
 - **Operatives:** taxi drivers, truck/van drivers
 - **Elementary:** cleaners, catering and waiting staff.

Unemployment

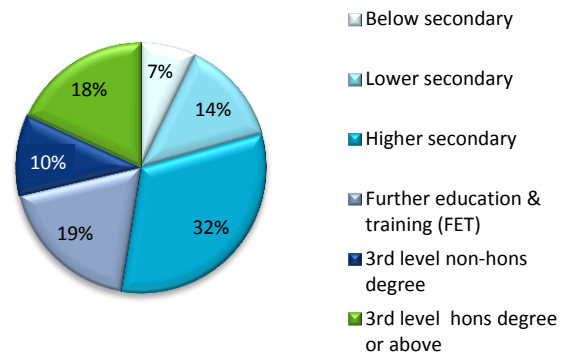
- In quarter 4 2013, there were 63,200 unemployed persons in the Dublin region (defined in ILO terms); of these, approximately three-in-five were long term unemployed
- **Age:** the share of those unemployed in this region aged 25-34 was 31%, almost twice higher than the share aged 15-24 (16%); the youth unemployment rate was 17.7%, well below the national average of 24.2%
- **Education:** while just over 20% of the unemployed had attained at most lower secondary education, Dublin had the highest share of unemployed persons with at least a third level honours degree (18%)
- **Sector:** the largest share of the unemployed in Dublin had previously worked in construction, followed by wholesale and retail, the public sector (within which the health segment accounted for more than a half) and food and accommodation services; Dublin had a relatively high share of unemployed persons previously employed in financial activities
- **Occupation:** while, like in other regions, the majority of unemployed persons had previously been employed in skilled trades and elementary occupations, Dublin had a higher than average share of those who had previously worked in associate professional and administrative occupations.

Figure 3.8 Unemployment by age (Dublin), Q4 2013



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

Figure 3.9 Unemployment by education (Dublin), Q4 2013



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

Figure 3.10a PES job seekers (Dublin), May 2014

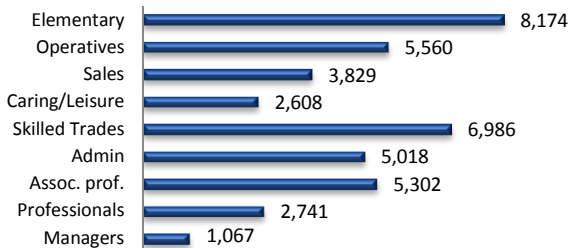
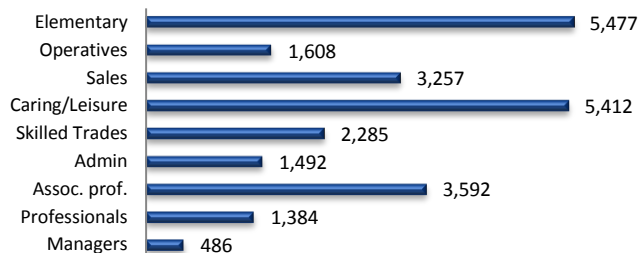


Figure 3.10b PES vacancies (Dublin), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

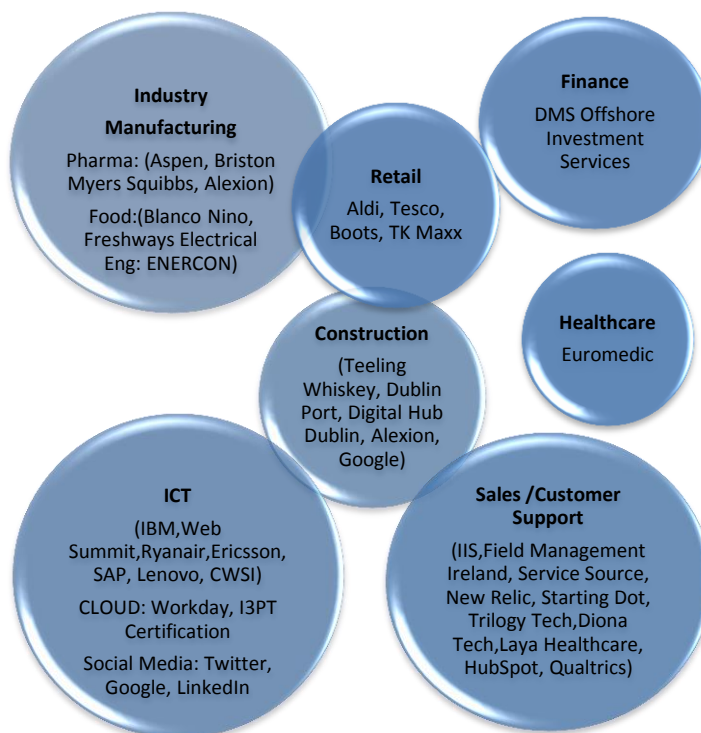
Live Register and PES job seekers and vacancies

- In April 2014, there were 94,529 persons on the Live Register in the Dublin region (a decline of 6% year-on-year); of those, 15% were under 25 years and 64% were male
- In May 2014, 41,300 job seekers were registered with the PES; the highest share (one-in-five), had previously worked as labourers (construction, plant, storage), one-in-six in skilled trades (carpenters, electricians, painters) and about one-in-eight as operatives (process, transport); the share who previously worked in associate professional and administrative occupations was the same as for operatives
- In 2013, 25,000 vacancies were advertised through DSP Jobs Ireland in the region; the highest number was for elementary occupations (catering assistants, cleaners and domestics), and caring occupations (care workers, nursing assistants), followed by associate professional and technical, and sales occupations (mostly credit collectors and sales assistants).

Employment growth and job creation

- Over the period quarter 4 2012 to quarter 4 2013, employment grew by almost 3%
- The accommodation and food and ICT sectors performed particularly well; employment also expanded in professional services, albeit by a relatively smaller extent; it remained static in the public sector, transport, and industry; it declined in financial services, and to a lesser extent, in wholesale and retail
- The data points to a turnaround in construction, which also expanded year-on-year, following a prolonged period of contraction; the pipeline for its residential segment suggests that 296,000 sq. meters could be built in the near future, accounting for 25% of the State's total floor area for which permissions were granted for houses
- Recent job announcements suggest that a considerable number of job opportunities will arise in the ICT sector in the short to medium term (mainly for sales, customer service and support roles); many roles will require a blend of ICT and business/financial services skills, or ICT skills and sales/customer support skills); the construction jobs announced will support the expansion of business, mainly in ICT.

Figure 3.11 Job creation announcements (Dublin), 2013 & 2014



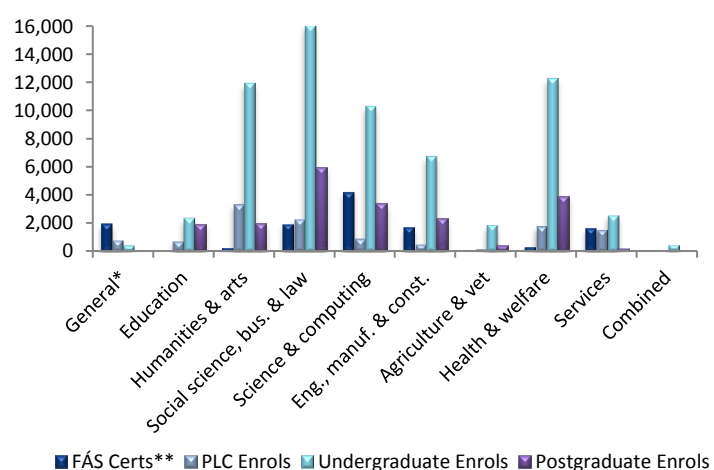
Source: Analysis by SOLAS (SLMRU) based on various sources

Education and training enrolments

In 2013, there were almost 110,000 learners and/or certificates in selected FET and higher education and training; there were:

- almost 12,300 FÁS certificates: over a third were in science and computing; this was followed by the social science, business and law field and general programmes field, which each made up a 16% share; 14% were in services
- approximately 12,000 PLC enrolments: humanities and arts had the highest number of enrolments (28% of the total), almost half of which were for media production; this was followed by social science, business and law (19%) and health and welfare (15%)
- 65,300 undergraduate enrolments: one quarter were for courses in social science, business and law; almost a fifth were in health and welfare, and a further 18% were in humanities and arts
- Approximately 20,000 postgraduate enrolments: 30% were in social science, business and law, 20% in health and welfare, and 17% were in science and computing.

Figure 3.12 FÁS Certs, PLC course & higher education enrolments (Dublin), 2013



Source: DES, HEA

* Includes general programmes and broad/ combined fields of learning.

** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year.

Early leavers from education and training: in quarter 4 2013 the ESL rate was 6%.

Census (2011) data by county

Table 3.1. Persons at work and unemployed in the Dublin region by area, Census 2011

	Dublin City	Dún Laoghaire-Rathdown	Fingal	South Dublin	Total Dublin
At work	42%	16%	22%	20%	100%
Unemployed	46%	10%	20%	23%	100%

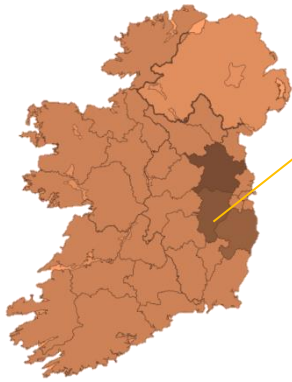
Source: CSO Census 2011

Table 3.1 shows Dublin employment by area in 2011. Dublin City accounted for the highest share of persons at work at 42%, with Dún Laoghaire-Rathdown accounting for the smallest share at 16%. A similar pattern emerged for the share of those unemployed, with Dublin City recording the highest share and Dún Laoghaire-Rathdown the lowest.

Key points from the Census 2011 data include:

- Occupation:** The share of persons at work in high skilled occupations (managers, professionals and associate professionals) in each area in Dublin met or exceeded the national average (of 39%); this was particularly the case for Dún Laoghaire-Rathdown where 60% of persons at work were in high skilled occupations.
- Sector:** Each of the Dublin areas had a higher than national average share of persons employed in ICT, finance and professional activities, particularly in Dún Laoghaire-Rathdown, and a lower than average share in agriculture and industry.
- Education:** Dún Laoghaire-Rathdown had the lowest share of persons at work with lower secondary education or less at 9% (compared to 18% nationally) and the highest share of persons who held a third level qualification (at 59%). Of all areas in Dublin, South Dublin was the only area where the share of persons at work with lower secondary education equalled the national average; it also had a lower than average share of persons with third level qualifications.
- Age:** Those persons from Dublin City at work were more likely to be aged 25-34 than all other areas in Dublin and nationally. Dún Laoghaire-Rathdown and Fingal had a lower share of unemployed persons aged under 25 than the national average.
- Unemployment:** Both Dún Laoghaire-Rathdown and Fingal have a lower share of unemployed persons with lower secondary education or less than nationally, while Dún Laoghaire-Rathdown has a significantly higher share of unemployed persons with third level qualifications.

4. Mid-East

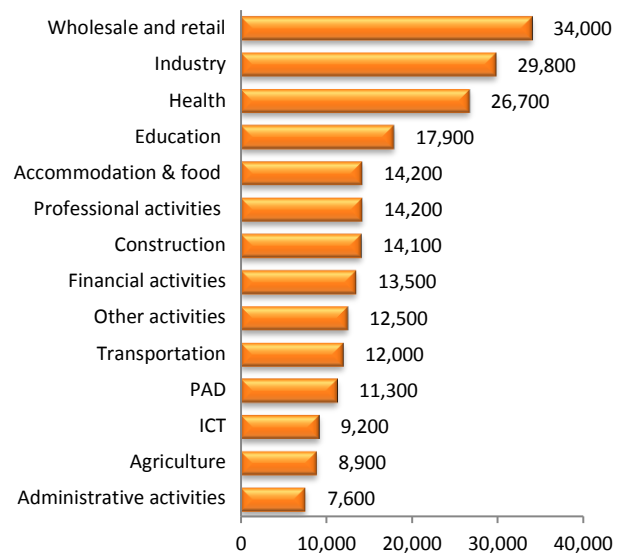


Population	543,900
Working age (15-64)	353,200
Labour force	258,100
Employment	225,900
Unemployment	32,200
Employment rate	62.3%
Unemployment rate	12.5%
Participation rate	63.3%
GVA per person (€)	21,714
GVA p.p. index (State = 100)	67.0

Employment by sector

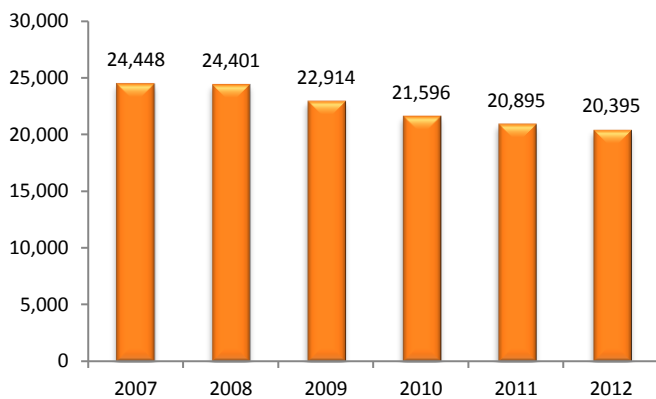
- In quarter 4 2013, wholesale and retail was the largest employer in the Mid-East, accounting for 15% of the region's employment
- The public sector (health, education and public administration and defence combined) accounted for a quarter of total employment in the Mid-East
- High value added sectors - professional and financial activities - each accounted for 6% of the region's employment, while information and communication activities accounted for 4%.

Figure 4.1 Employment by broad economic sector (Mid-East), Q4 2013



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

Figure 4.2 Active enterprises: business economy* (Mid-East)



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

*The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20)

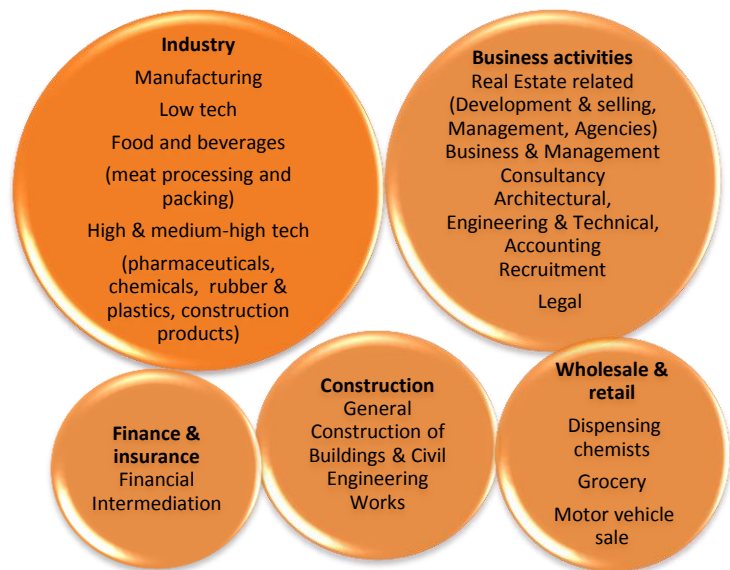
Active enterprises

- In 2012, there were almost 20,400 active enterprises in the Mid-East region; this was a decline of 2.5% compared to 2011
- Compared to the 2007 level, the number of active enterprises declined by 16.6%, or just over 4,000
- Wholesale and retail and construction had the largest share of active enterprises, at 22% and 21% respectively; there were approximately 7,300 enterprises in professionals services (or 16% of the total)
- There were 1,150 enterprises (6% of the total) in the ICT sector; after Dublin, this was the highest share of enterprises in this sector
- Less than 1% of active enterprises were medium sized (with 50-249 persons engaged); 92.5% were micro enterprises (less than 10 persons engaged).

Medium to large enterprises by sector

- Outside the public sector and agriculture, the highest number of medium to large enterprises (employing 50 persons or more) in the Mid-East region is found in business activities, wholesale and retail, construction, and industry (manufacturing, particularly in food processing, high tech and medium-high tech manufacturing e.g. pharmaceuticals, chemicals, etc.)
- There were also a sizeable number of large and medium enterprises in construction, mostly in general construction and civil engineering.

Figure 4.3 Sectors with largest enterprises (Mid-East), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 4.4a Industrial units (Mid-East)

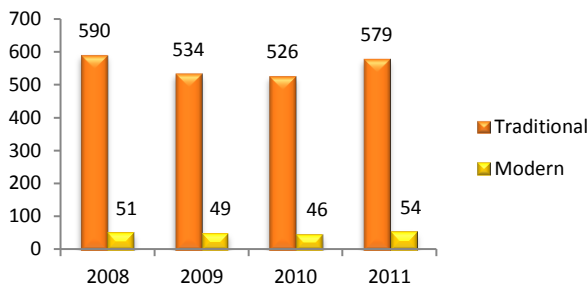
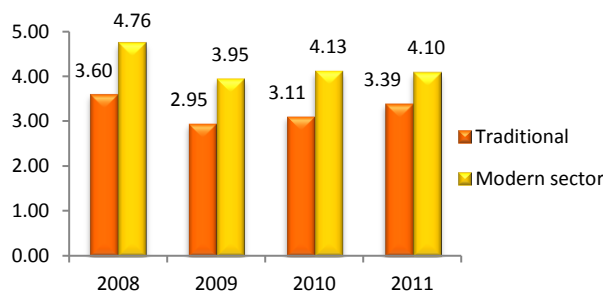


Figure 4.4b Gross output in industrial units (Mid-East), € billion



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

Regional economy output (Gross Value Added, 2011)

- GVA per person: €21,714; GVA index (State = 100): 67.0
- GVA (share, % of State's total): 7.8

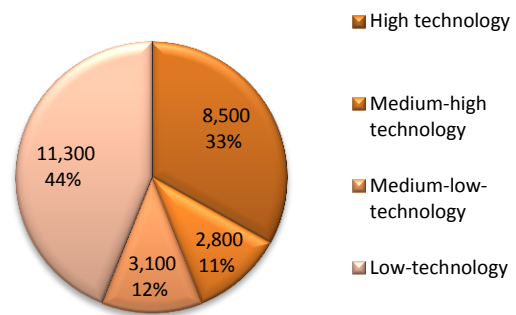
Industrial activity

- In 2011, 91% of all industrial units (manufacturing, energy and utilities) in the Mid-East region were in the traditional sector
- The number of industrial units increased in both sectors (modern and traditional) between 2010 and 2011, the first increase since 2008
- While the modern industry sector accounted for 9% of industrial units, it produced just over 55% of the regional gross industrial output value in 2011
- Between 2010 and 2011, the value of gross output in the traditional sector increased from €3.11 billion to €3.39 billion; the value of gross output for the modern sector remained relatively unchanged.

Manufacturing employment

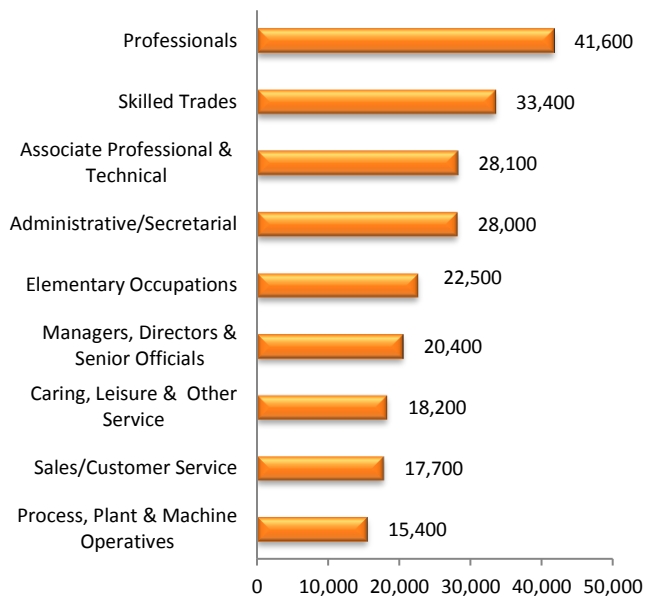
- In quarter 4 2013, 25,700 persons in the Mid-East region were employed in manufacturing; of those:
 - One third were employed in the high tech segment, which was above the national average
 - Almost a further 11,500 persons or 44% were employed in low-tech manufacturing (e.g. food processing, wood, printing, etc.) which was also above the national average
 - Combined, almost a further one quarter were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metals, etc.) and medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment, etc.).

Figure 4.5 Manufacturing employment (Mid-East), Q4 2013



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

Figure 4.6 Employment by broad occupation (Mid-East), Q4 2013 *



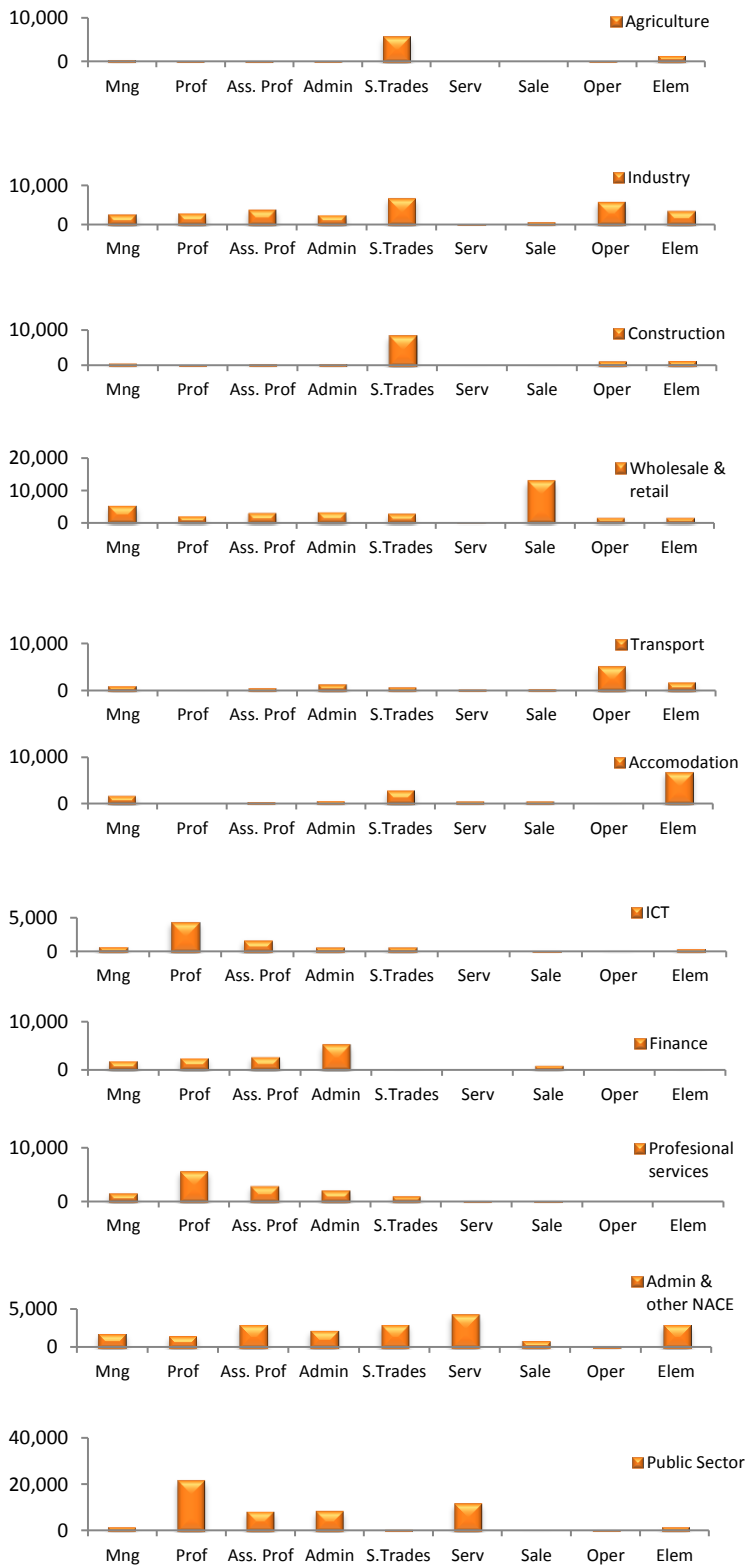
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Those whose occupation was not known/stated are not depicted.

Employment by occupation

- In quarter 4 2013, almost one-in-five (20%) persons in employment in the Mid-East were professionals, and one-in-eight were associate professionals
- At 15%, the second largest share of those employed in the region were working in skilled trades; with in excess of 5,000 farmers employed, they accounted for about one-in-six of all persons employed in skilled trades overall
- Those employed in elementary occupations accounted for 10% of the region's total employment.

Figure 4.7 Employment by broad occupation and sector (Mid-East) (000s), Q4 201



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

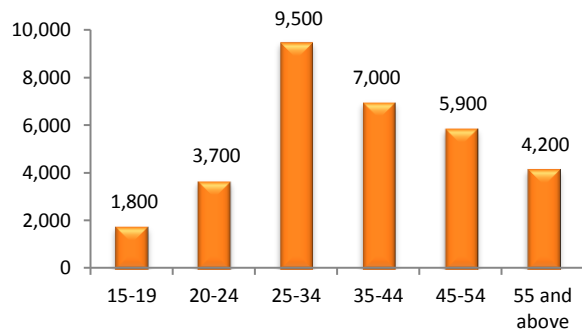
Employment by occupation and sector

- In quarter 4 2013, employment in high skilled occupations (professionals and associate professionals) dominated employment in four sectors: information and communication (ICT), professional services, finance and the public sector; their combined share ranged from two thirds in the ICT sector to just over one half in the public sector
- Employment in professional and associate professional occupations combined accounted for almost one-in-four of those employed in industry, the same share as accounted for by skilled trades; within manufacturing, professionals and associate professional workers accounted for almost one half of those employed in high tech manufacturing
- Of the region’s 6,500 IT professionals, one half were working in the ICT sector
- Those employed in skilled trades accounted for three-in-five of all those employed in construction
- Persons employed in elementary occupations accounted for one half of those employed in food and accommodation services
- Within occupational groups, the highest employment was found in the following occupations:
 - **Managers:** functional managers, managers in wholesale and retail
 - **Professionals:** teachers, nurses, IT professionals, accountants
 - **Associate professionals:** business sales executives, sales accounts managers, police and army officers
 - **Admin/secretarial:** book-keepers, payroll managers and wages clerks, finance admin occupations (e.g. bank clerks), Government clerks, PAs and generic admin
 - **Skilled trades:** farmers, metal working production and maintenance fitters, carpenters and joiners, chefs and mechanics
 - **Services:** care workers, childminders, hairdressers
 - **Sales:** retail sales assistants
 - **Operatives:** taxi drivers, truck drivers, food process operatives
 - **Elementary:** catering staff, construction workers, cleaners and domestics.

Unemployment

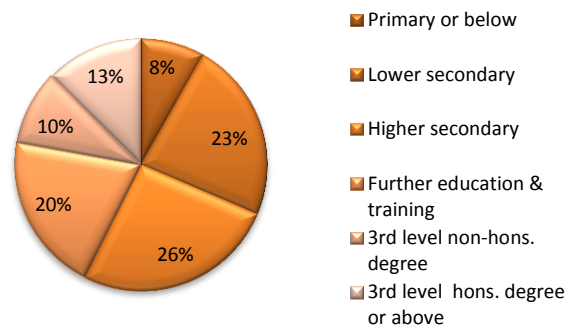
- In quarter 4 2013, there were 32,200 unemployed persons in the Mid-East region in ILO terms; of those, about three-in-five were long-term unemployed
- The Mid-East region had the highest participation rate (63.3%) of all regions
- Age:** those aged under 25 comprised 17% of all unemployed persons in the region; the youth unemployment rate was 23%, which was just below the national average rate of 24%; at the same time, at 13%, the region had one of the highest shares of unemployed persons aged 55 and over
- Education:** almost one third of those unemployed in this region had achieved at most lower secondary - one of the highest shares of all regions; almost one quarter had some third level education
- Sector:** those previously employed in construction accounted for almost a fifth of all those unemployed in the Mid-East, and those previously employed in manufacturing for one-in-eight; 9% previously worked in wholesale and retail and 8% in food and accommodation
- Occupation:** most were previously employed in skilled trades and in elementary occupations.

Figure 4.8 Unemployment by age (Mid-East), Q4 2013



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

Figure 4.9 Unemployment by education (Mid-East), Q4 2013



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

Figure 4.10a PES job seekers (Mid-East), May 2014

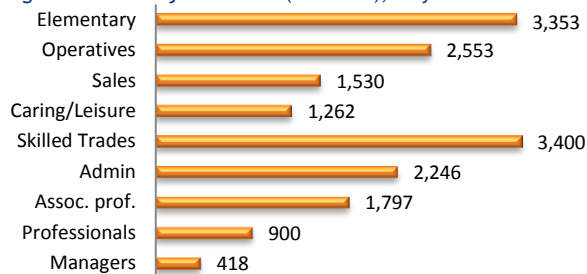
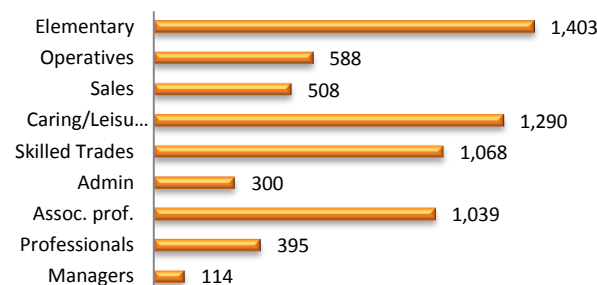


Figure 4.10b PES vacancies (Mid-East), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

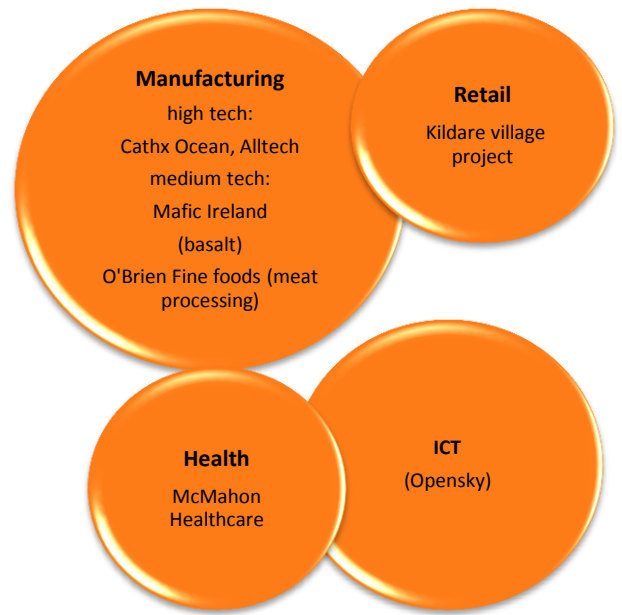
PES job seekers and vacancies

- In April 2014, there were 38,000 persons on the Live Register in the Mid-East region (a decline of 7% year-on-year); 14% were under 25 years and 60% were male
- In May 2014, 17,500 job seekers were registered with the PES; almost one fifth had previously worked in skilled trades (carpenters, electricians), and the same share worked in elementary occupations (construction, process plant), while 15% worked as operatives (process, transport)
- In 2013, over 6,700 vacancies were advertised through DSP Jobs Ireland, representing 10% of all notified PES vacancies in the State; the highest number of vacancies was for elementary occupations (e.g. catering assistants, waiters, security guards and cleaners), carers (care workers, home carers), associate professionals (IT support technicians, business sales executives and electrical/electronic technicians), and skilled trades (chefs and butchers).

Employment growth and job creation

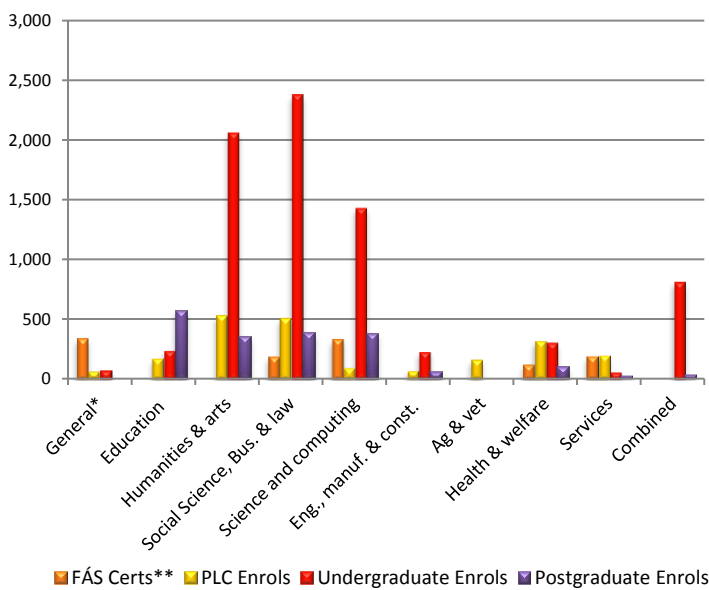
- Over the period quarter 4 2012 to quarter 4 2013, employment remained static in the Mid-East region
- Employment contracted in some sectors (particularly in ICT, and to a lesser extent, in wholesale and retail and construction) but these losses were offset by expansion in others, namely industry (especially low tech manufacturing), transport, food and accommodation, and professional and administrative services; within the broad public sector, employment contracted in both education and public administration and defence, and although it increased in health (driven by the expansion of residential care activities), the net result was a decline in the sector; employment remained static in agriculture
- Recent job announcements suggest that, over the short to medium term, job opportunities will arise primarily in industry (high technology manufacturing with the expansion of Cathx Ocean and in medium-tech manufacturing) ICT, and wholesale and retail.

Figure 4.11 Job creation announcements (Mid-East), 2013 & 2014



Source: Analysis by SOLAS (SLMRU); various sources

Figure 4.12 FÁS Certs, PLC courses & higher education enrols (Mid-East), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning.
 **FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Education and training enrolments

In 2013, there were almost 12,800 learners and/or certificates in selected further and higher education and training; there were:

- almost 1,200 FÁS certificates: the highest share, at 29%, was for general learning, followed by science and computing at 28%; combined, the services field and the social science, business and law field made up a further third, while 10% were in health and welfare;
- almost 2,100 PLC enrolments: the highest number of enrolments was in the humanities and arts field (amounting to 25% of the total) and in the social science, business and law field (24%); a further 15% were in health and welfare
- approximately 7,600 undergraduate enrolments: most enrolments were in one of three fields of learning: social science, business and law (31%), humanities and arts (27%) and science and computing (19%)
- almost 2,000 postgraduate enrolments: 30% were in education, with approximately a further fifth each in science and computing, social science, business and law, and humanities and arts.

Early school leavers from education and training: in quarter 4 2013, the ESL rate was 7% - just below the national average.

Census (2011) data by county

Table 4.1. Persons at work and unemployed in the Mid-East region by county, Census 2011

	Kildare	Meath	Wicklow	Total Mid-East
At work	40%	35%	25%	100%
Unemployed	39%	34%	27%	100%

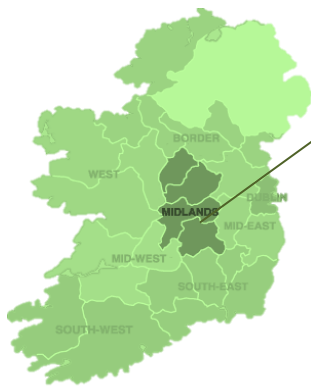
Source: CSO Census 2011

Table 4.1 shows employment in the Mid-East region by county in 2011. Kildare accounted for the largest share of employment in the Mid-East region at 40%, followed by Meath at 35%, and Wicklow at 25%.

Key points from Census 2011

- **Occupation:** Both Kildare and Wicklow had a higher share of persons employed in high skilled occupations (managers, professionals and associate professionals) than Meath. However, overall, the counties were broadly in line with the national average.
- **Sector:** The number of persons at work across sectors was broadly in line with the national average for all counties in the Mid-East region, with employment primarily in the wholesale and retail trade, industry and health.

5. Midland



Population	288,100
Working age (15-64)	184,200
Labour force	128,800
Employment	111,100
Unemployment	17,600
Employment rate	58.1%
Unemployment rate	13.7%
Participation rate	59.0%
GVA per person (2011)	€17,777
GVA index (State=100)	55.0

Employment by sector

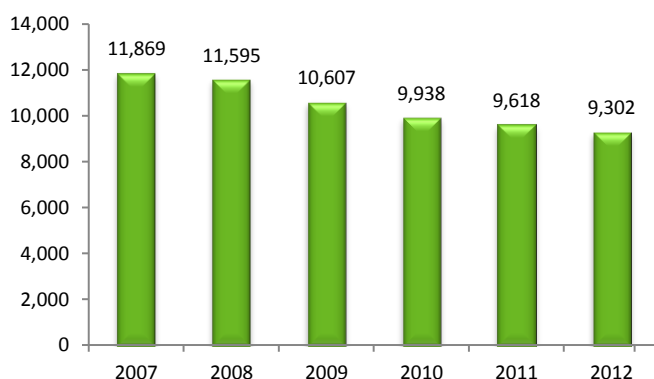
- In quarter 4 2013, wholesale and retail and industry were the largest sectors of employment in the Midland region, accounting for almost 30% of the region's total employment
- Two thirds of total employment in the region was concentrated in services; knowledge intensive services (high tech, market and financial) accounted for 10%, while less knowledge intensive services accounted for 29% of employment
- There were 31,000 persons employed in the public sector (i.e. PAD, health and education) - accounting for 28% of total employment in the Midland region

Figure 5.1 Employment by broad economic sector (Midland), Q4 2013



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

Figure 5.2 Active enterprises: Business economy* (Midland)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

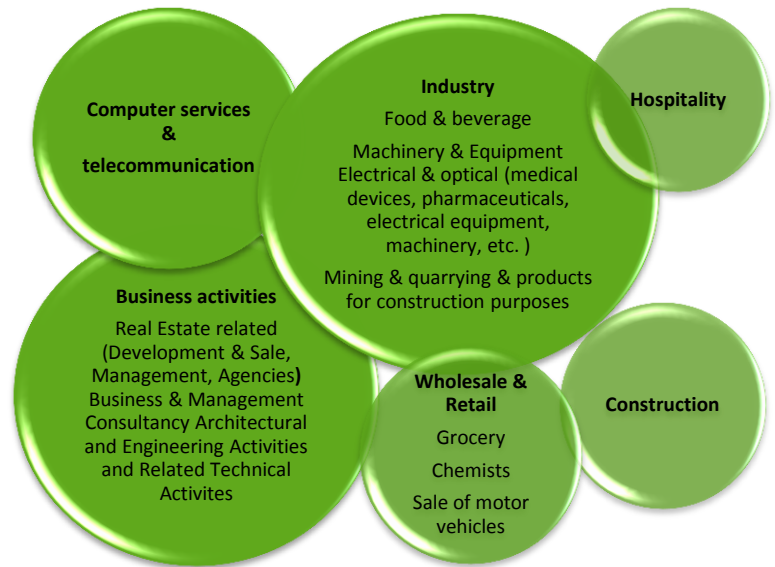
Active enterprises

- In 2012, there were 9,300 active enterprises in the Midland region; between 2011 and 2012, the number declined by 3%
- Over the period 2007 to 2012, the number of active enterprises declined by almost 2,600, or one fifth; construction was particularly adversely affected - the sector lost two fifths of its active enterprises (1,850) over the period
- Wholesale and retail and construction had the largest number of active enterprises, accounting for 26% and 23% of the total respectively; accommodation and food and professional services each accounted for approximately one-in -ten active enterprises
- In terms of their size, 92 % of active enterprises were micro enterprises (with less than 10 persons engaged).

Medium to large enterprises by sector

- In the Midland region, business services, wholesale and retail, and construction accounted for the largest number of medium to large enterprises
- There are also a considerable number of medium to large enterprises in manufacturing - mostly in the areas of food processing, high tech manufacturing (medical devices and pharmaceuticals), and medium-high tech manufacturing (e.g. cement, plaster or concrete products for construction purposes)
- There are also some medium to large enterprises in hospitality (hotels and restaurants) related activities.

Figure 5.3 Sectors with largest enterprises (Midland), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 5.4a Industrial units (Midland)

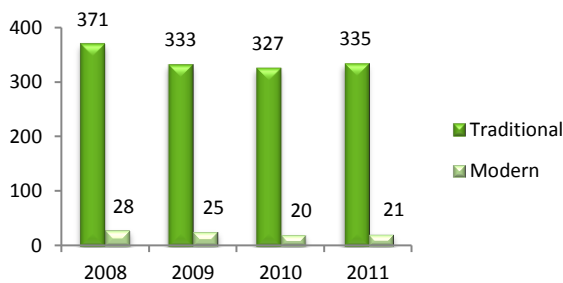
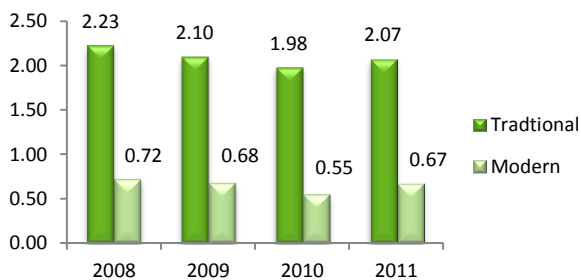


Figure 5.4b Gross output in industrial units (Midland), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €17,777; GVA index (State=100): 55.0
- GVA (share, % of State's total): 3.4

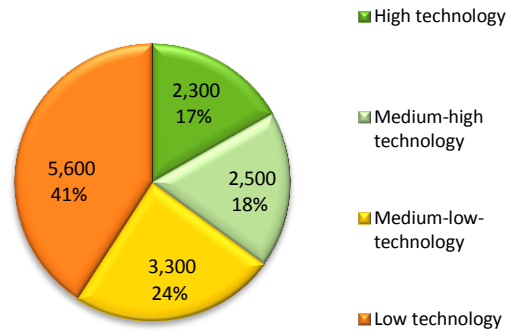
Industrial activity

- In 2011, 94% of all industrial units (manufacturing, energy and utilities) in the Midland region were concentrated in the traditional sector
- The number of industrial units increased between 2010 and 2011; this was the first increase recorded since 2008
- Despite the fact that it made up just 6% of the total number of industrial units, the modern industry sector produced over one fifth of the region's gross industrial output value in 2011
- The value of gross output in both sectors (modern and traditional) increased between 2010 and 2011; the increase was the strongest in the modern sector, which rose from €0.55 billion to €0.67 billion year-on-year.

Manufacturing employment

- In quarter 4 2013, almost 14,000 persons in the Midland region were employed in manufacturing
- Low technology manufacturing accounted for 41% of total manufacturing employment; within this segment, food processing accounted for four fifths
- Medium-low tech manufacturing accounted for about one quarter of total manufacturing
- Medium-high tech (e.g. chemicals, electrical, transport equipment, etc.) and high tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for 18% and 17% of total manufacturing employment respectively
- At 17%, the share of manufacturing employment concentrated in the high tech sector in the Midland region was below national average share (26%).

Figure 5.5 Manufacturing employment (Midland), Q4 2013



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

Figure 5.6 Employment by broad occupation (Midland), Q4 2013 *



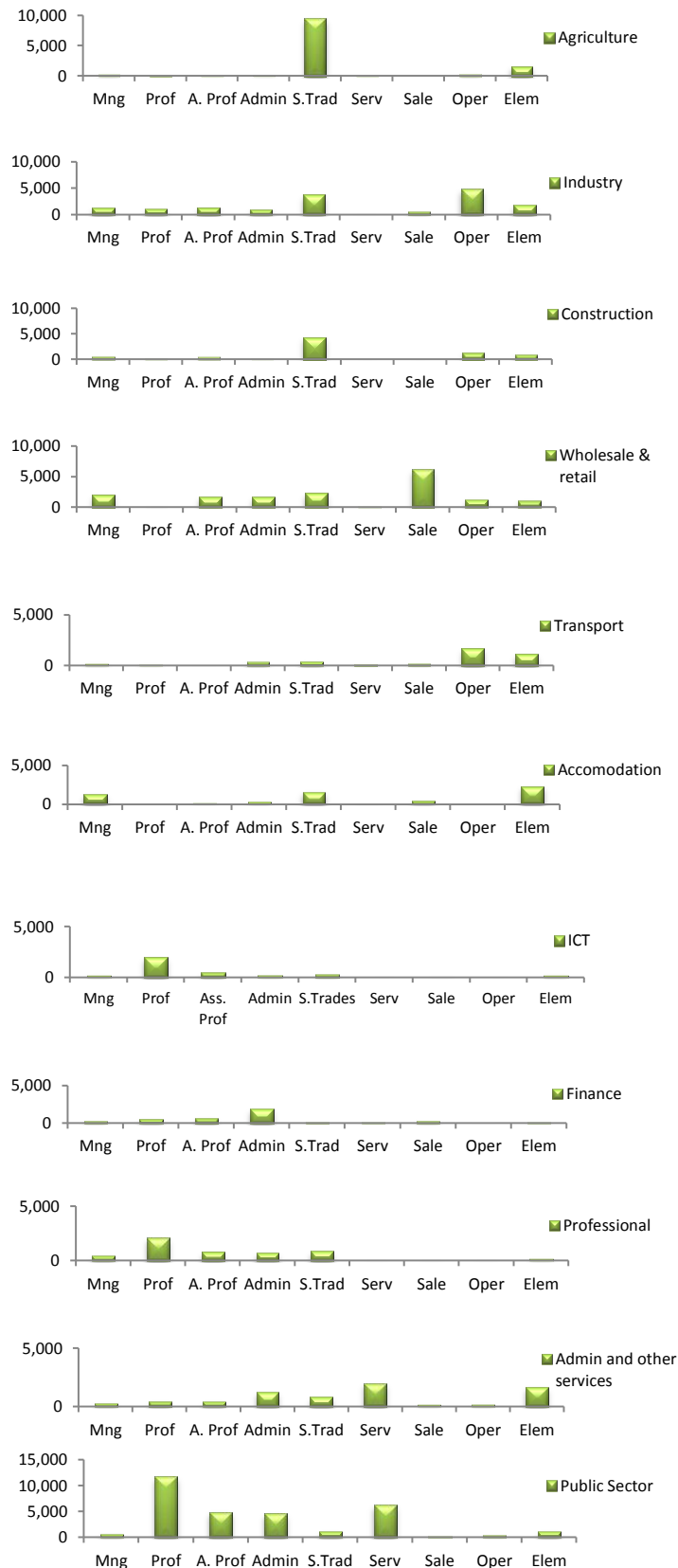
Source: Analysis by SOLAS (SLMRU) based on CSO data

* Those whose occupation was not known/stated are not depicted.

Employment by occupation

- In quarter 4 2013, employment in skilled trades was the highest in the Midland region, with almost 25,000 persons - accounting for more than one fifth of all persons employed in the region; farmers accounted for more than one third of total employment in skilled trades
- Those employed in professional occupations accounted for 16% of all persons employed in the region, while associate professionals accounted for 10%
- Employment in elementary occupations and process and plant operatives combined, accounted for one fifth of total employment.

Figure 5.7 Employment by broad occupation and sector (Midland) (000s), Q4 2013



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

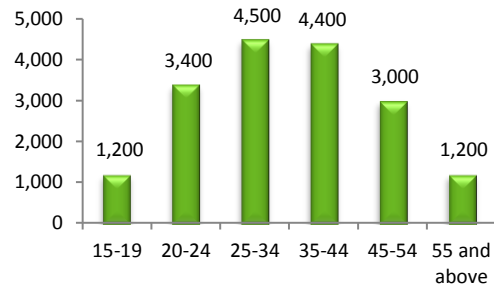
Employment by occupation and sector

- In quarter 4 2013, approximately one-in-five of all those employed in industry were working in skilled trades, while almost one-in-three were working as operatives
- Accommodation and food services had the highest share of those employed in elementary occupations (38%)
- Professionals were the largest occupation in the information and communication sector (ICT), professional services, and the public sector (PAD, health and education combined) - they accounted for about two-in-five of all persons employed in these sectors
- Associate professional workers accounted for almost one-in-six of all persons employed in the public sector
- Those employed in administrative occupations accounted for almost one half of all persons employed in financial, insurance and real estate activities, the highest share across all sectors
- Within occupational groups, the highest employment was in the following occupations:
 - **Managers:** functional managers
 - **Professionals:** teachers, nurses
 - **Associate professionals:** police officers, business sales executives
 - **Secretarial/admin:** Government clerks, financial admin (e.g. bank clerks, payroll, book-keepers), PAs
 - **Skilled trades:** farmers, metal working production and maintenance fitters, mechanics
 - **Services:** care workers and home carers
 - **Sales:** sales and retail assistants
 - **Operatives:** drivers, food process operatives
 - **Elementary:** construction workers.

Unemployment

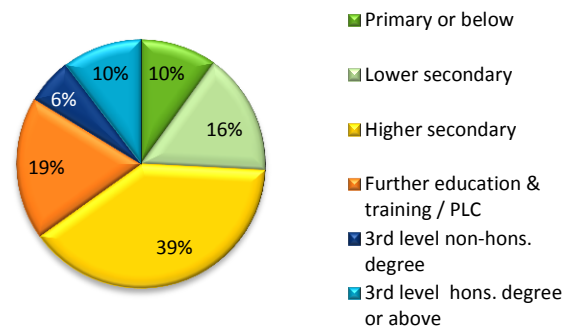
- In quarter 4 2013, there were just over 17,500 unemployed persons in the Midland region (defined in ILO terms)
- Age:** one quarter of those unemployed in the region were younger than 25; the unemployment rate for this age group was 36%, well above the national average
- Education:** just over a quarter of all unemployed persons in the Midland region had at most lower secondary education, about two-in-five had higher secondary education, almost a fifth had PLC/FET, and 16% had attained a third level education; this region had one of the lowest shares of unemployed persons with third level qualifications
- Sector:** unemployed persons in the region had primarily been employed in the construction and wholesale and retail sectors
- Occupation:** the largest share of the unemployed in the Midland region had previously been employed in skilled trades, followed by elementary occupations and operatives.

Figure 5.8 Unemployment by age (Midland), Q4 2013



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

Figure 5.9 Unemployment by education (Midland), Q4 2013



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

Figure 5.10a PES job seekers (Midland), May 2014

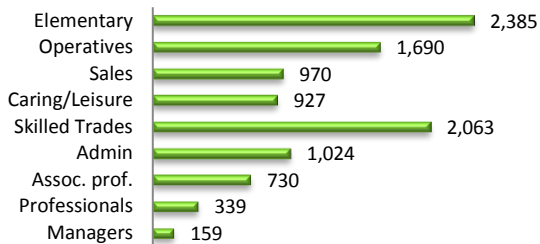
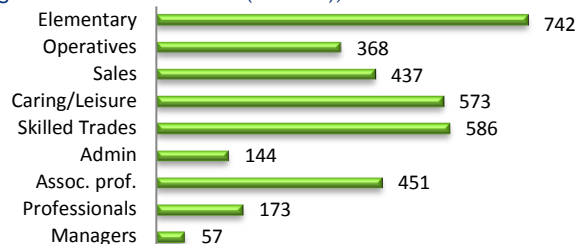


Figure 5.10b PES vacancies (Midland), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

PES job seekers and vacancies

- In April 2014, there were 31,250 persons on the Live Register in the Midland region (a 6% decline year-on-year); 16% were under 25 years and 61% were male
- In May 2014, approximately 10,300 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (construction and building, process plant), skilled trades (carpenters, painters and decorators, plasterers, bricklayers) or as operatives (HGV/van/mobile machine drivers, process operatives), and sales (sale assistants)
- In 2013, over 3,500 vacancies were advertised through DSP Jobs Ireland, accounting for 6% of all notified PES vacancies in the State; the highest number was for elementary occupations (security guards), skilled trades (chefs), associate professionals (business sales executives), caring/leisure and personal services (home carers) and sales (sales and retail assistants).

Employment growth and job creation

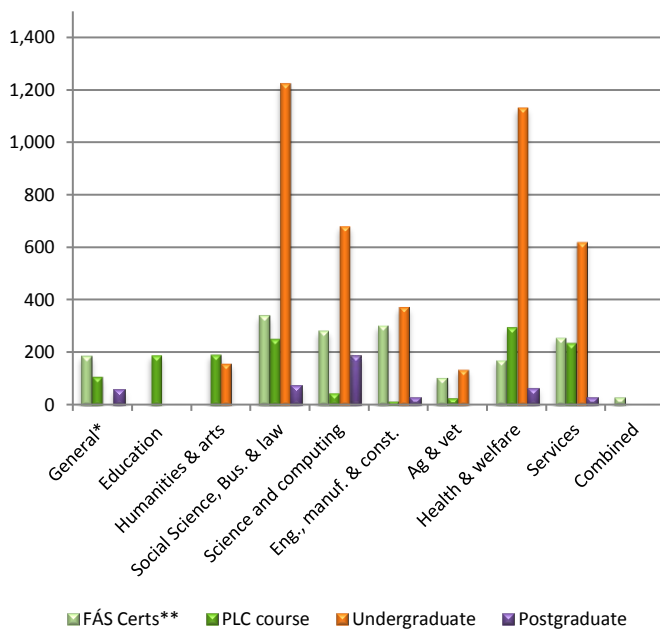
- Over the period quarter 4 2012 to quarter 4 2013, employment in the Midland region increased by approximately 5,500 persons or 5%
- Agriculture, professional services, and construction recorded employment growth, while on the other hand wholesale and retail and administrative services contracted
- Within the public sector, health and social work expanded while PAD and education remained static
- Recent job announcements suggest that job opportunities, in the short to medium term, will arise primarily in the high tech manufacturing (e.g. biopharma), construction and wholesale and retail sectors.

Figure 5.11 Job creation announcements (Midland), 2013 & 2014



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

Figure 5.12 FÁS Certs, PLC courses & higher education enrols (Midland), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning.
 ** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Education and training enrolments

In 2013, there were almost 7,800 learners and/or certificates in selected further/higher education and training; there were:

- almost 1,700 FÁS certificates: the highest number of certs was in social science and law, making up a fifth of the total; engineering, manufacturing and construction accounted for 18%, and science and computing for 17%
- almost 1,400 PLC enrolments: health and welfare had the highest number of enrolments (22% of the total), followed by social science, business and law which accounted for approximately a fifth, while services accounted for 17%
- over 4,300 undergraduate enrolments: 28% (1,225) were for courses in social science, business and law, 26% (1,133) were in health and welfare, and a further 16% (682) were in science and computing
- approximately 400 postgraduate enrolments: two-in-five were in science and computing.

Early school leaving from education and training: in quarter 4 2013, the ESL rate was 11% - above the national average rate.

Census (2011) data by county

Table 5.1. Persons at work and unemployed in the Midland region by county, Census 2011

	Laois	Longford	Offaly	Westmeath	Total Midland
At work	29%	13%	26%	31%	100%
Unemployed	28%	15%	28%	29%	100%

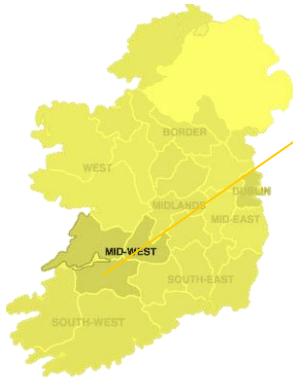
Source: CSO Census 2011

Table 5.1 shows employment in the Midland region by county in 2011. Westmeath accounted for the largest share of employment in the Midland region at 31%, followed by Laois at 29%; Offaly accounted for 26% of Midland employment while Longford accounted for 13%.

Key points from the Census 2011 data include:

- Occupation:** All counties in the Midland region had a lower than average share of persons at work in high skilled occupations (managers, professionals and associate professionals), with Longford having the smallest share at 30%; skilled trades accounted for between 17% and 20% of persons at work across counties; 10% of persons at work in Longford and Offaly were employed as operatives (compared to 7% nationally).
- Sector:** The share of persons at work in agriculture was higher than the national average (of 5%) for all counties in the Midland region, particularly for Longford with a 9% share; Longford and Offaly also had a high share of persons at work in industry at 15% and 17% respectively; the shares of persons employed in financial and professional activities were lower than average for all counties.
- Education:** For persons at work, all counties had a higher share of persons with lower secondary education or less than the national average, particularly Longford and Offaly; in addition, all counties had a lower share than nationally of persons at work with third level qualifications, particularly Longford and Offaly.
- Unemployment:** Unemployment across occupations was similar across all counties in the Midland region, with skilled trades accounting for at least a fifth of all unemployed persons for each county.

6. Mid-West



Population	378,000
Working age (15-64)	246,600
Labour force	169,500
Employment	151,300
Unemployment	18,200
Employment rate:	60.2%
Unemployment rate	10.7%
Participation rate	57.2%
GVA per person (€)	25,982
GVA p.p. index (State = 100)	81.0

Employment by sector

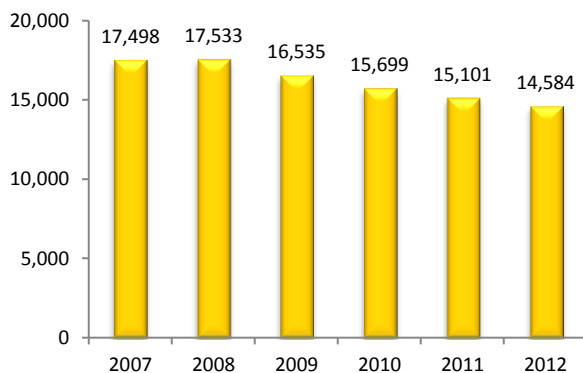
- In quarter 4 2013, industry was the largest employer, accounting for 17% of total employment in the Mid-West region
- Public sector employment (PAD, health and education combined) accounted for 26% of employment in the region
- High value added sectors (professional, financial and information and communication combined) accounted for almost 10% of the region's employment.

Figure 6.1 Employment by broad economic sector (Mid-West), Q4 2013



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

Figure 6.2 Active enterprises: Business economy* (Mid-West)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (NACE code 64.20 activities of holding companies is excluded from sector K)

Active enterprises

- In 2012, there were approximately 14,600 active enterprises in the Mid-West region; this was almost 3.5% fewer than in 2011
- Since 2007, the region lost almost 3,000 enterprises; approximately 2,000 of these were active in construction
- Wholesale and retail had the largest number of active enterprises, approximately 3,500, followed by construction (2,800) and professional services (2,000)
- Nine-in-ten active enterprises had fewer than 10 persons engaged; one-in-twenty had 10-19 persons engaged.

Medium to large enterprises by sector

- The highest number of medium to large enterprises (employing at least 50 persons) in the Mid-West region, outside the public sector and agriculture, is found in business services, wholesale and retail and construction
- There are also some medium to large enterprises in manufacturing, (particularly for food/beverages and high tech products and, to a lesser extent, fabricated metal and medium-high tech products) and hospitality (hotels and restaurants).

Figure 6.3 Sectors with largest enterprises (Mid-West), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 6.4a Industrial units (Mid-West)

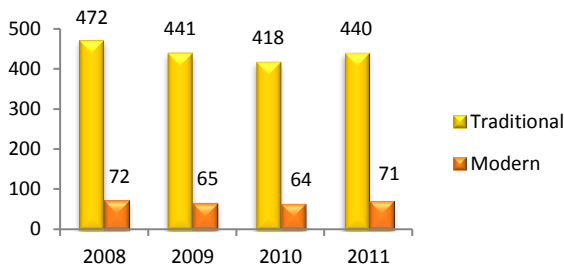
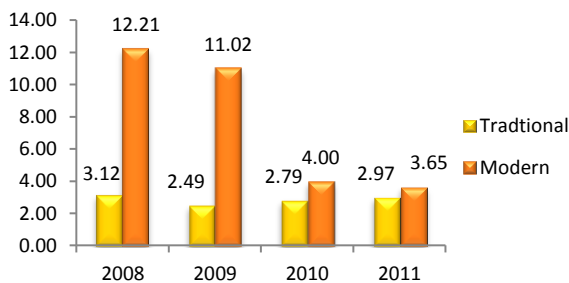


Figure 6.4b Gross output in industrial units (Mid-West), € billion



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

Regional economy (Output, Gross Value Added, 2011)

- GVA per person: €25,982; GVA index (State =100): 81.0
- GVA (share, % of State's total): 6.7

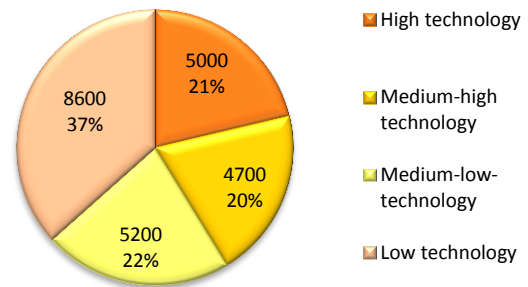
Industrial activity

- In 2011, 86% of all industrial units (manufacturing, energy and utilities) in the Mid-West region were in the traditional sector
- The number of industrial units increased in 2011 for both sectors (modern and traditional) bringing figures broadly in line with those in 2009; this is the first increase recorded since the economic downturn
- Although it accounted for only 14% of all industrial units, the modern industry sector produced 55% of the region's €6.6 billion of gross industrial output in 2011
- The value of gross output in the traditional sector increased between 2010 and 2011
- However, despite the increase in industrial units, the gross output value in the modern sector declined (by €0.35 billion), continuing the even sharper fall observed between 2009 and 2010, when output value declined by more than €7 billion.

Manufacturing employment

- In quarter 4 2013, 23,500 persons in the Mid-West region were employed in manufacturing
- Low technology manufacturing was the largest segment, accounting for over one third of total manufacturing employment; within this segment, food industry was the largest, with over 5,000 persons employed
- The remaining three segments each accounted for approximately one fifth of total manufacturing employment in the region - high tech manufacturing (e.g. pharmaceuticals, electronics, optical products, etc.) accounted for 21%, medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment) accounted for 20%, and medium-low tech manufacturing for 22%
- At 21%, the share of manufacturing employment in the region concentrated in high tech segment was below the national average share of 26%.

Figure 6.5 Manufacturing employment (Mid-West), Q4 2013



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

Figure 6.6 Employment by broad occupation (Mid-West), Q4 2013 *



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

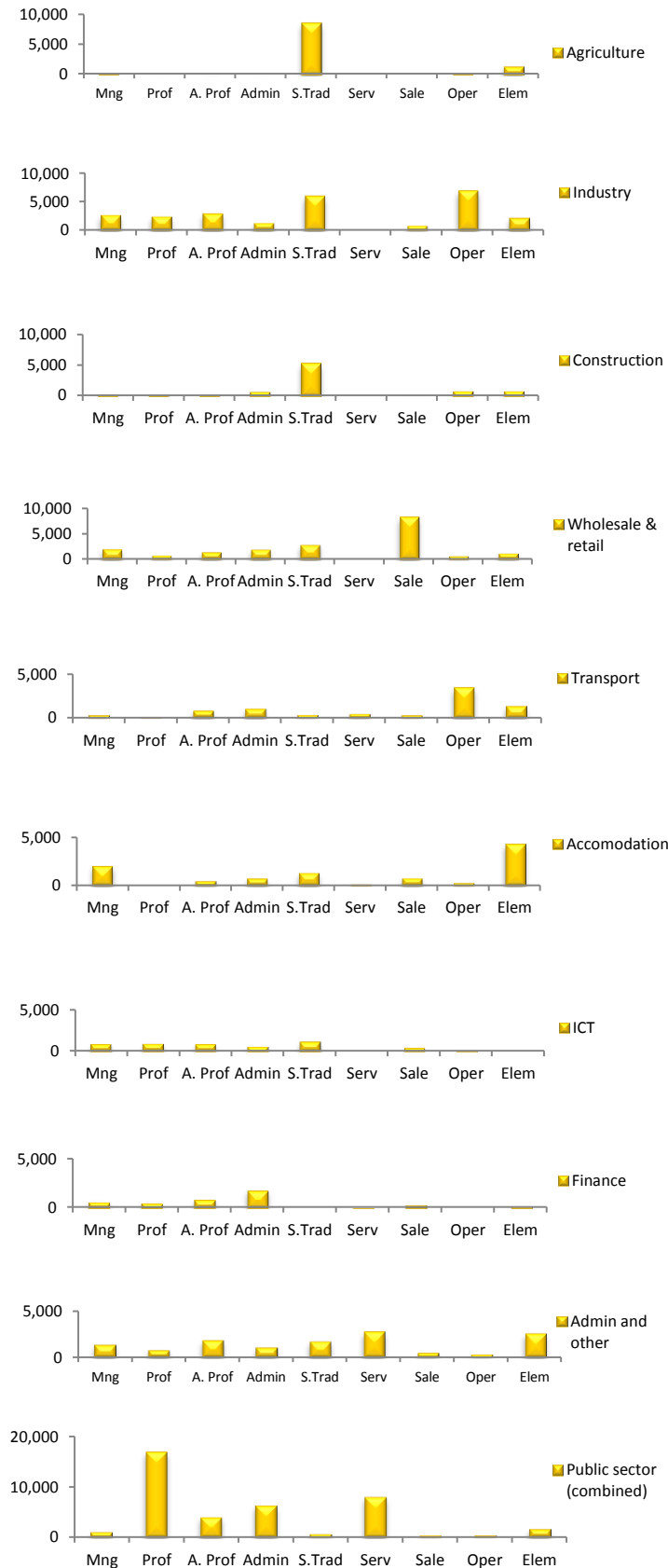
* Those whose occupation was not known/stated are not depicted.

Employment by occupation

- In quarter 4 2013, more than one quarter of total employment in the Mid-West region was either in professional or associate professional occupations
- Almost 29,000 persons were employed in skilled trades in the region; farmers accounted for 29% of employment in this occupational group
- Those engaged in elementary occupations and those working as operatives each accounted for about one-in-ten (10%) of all persons employed in the Mid-West region; operatives were relatively more numerous in transport, and elementary occupations in accommodation and food services - each accounting for two-in-five of all those employed in these sectors.



Figure 6.7 Employment by broad occupation and sector (Mid-West), Q4 2013



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

Employment by occupation and sector

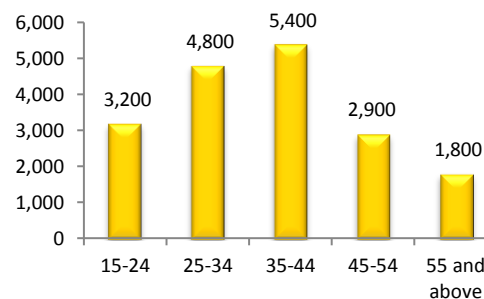
- In quarter 4 2013, 40% of all those employed in the Mid-West were working in knowledge intensive services and 30% in less knowledge intensive services
- Most of those employed in both professional services and the public sector worked in professional occupations
- One fifth of those working in accommodation and food services were managers/directors - the largest share across all sectors
- The majority of those working in industry were either in low skilled (elementary) occupations or in skilled trades occupations, accounting for just over one quarter of all employed, and just under one quarter respectively
- Within occupational groups, the highest employment was found in the following occupations:
 - **Managers:** functional managers/directors, production managers and directors in manufacturing, managers and proprietors in wholesale and retail
 - **Professionals:** teachers, nurses and midwives, accountants
 - **Associate professionals:** business sales executives
 - **Secretarial/admin:** Government clerks, personal assistants and other secretaries, and finance admin. occupations (e.g. bank clerks and wages clerks)
 - **Skilled trades:** farmers, fitters (metal work and maintenance), electricians, chefs
 - **Services:** care workers and home carers
 - **Sales:** sales and retail assistants
 - **Operatives:** assemblers and routine operatives, truck and van drivers
 - **Elementary:** catering and waiting staff, cleaners and domestics.



Unemployment

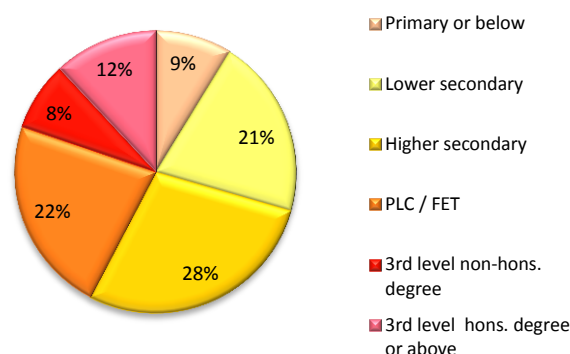
- In quarter 4 2013, there were 18,200 unemployed persons in the Mid-West region; this was a year-on-year decline of 9,000 persons (or about one third)
- Those seeking work for one year and longer accounted for almost two thirds of all those unemployed in the region
- **Age:** just under one fifth of all those unemployed in the Mid-West region were younger than 25; the unemployment rate for 15-24 year olds was 24%, the same as the national rate
- **Education:** 30% of all unemployed persons in this region had not progressed beyond lower secondary education; 20% had attained some third level qualification
- **Sector:** most unemployed persons in the Mid-West had previously been employed in construction, wholesale and retail, and industry
- **Occupation:** most of unemployed persons in the region had previously been employed in skilled trades and in elementary occupations (16% and 12% of all unemployed respectively).

Figure 6.8 Unemployment by age (Mid-West), Q4 2013



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

Figure 6.9 Unemployment by education (Mid-West), Q4 2013



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

Figure 6.10a PES job seekers (Mid-West), May 2014

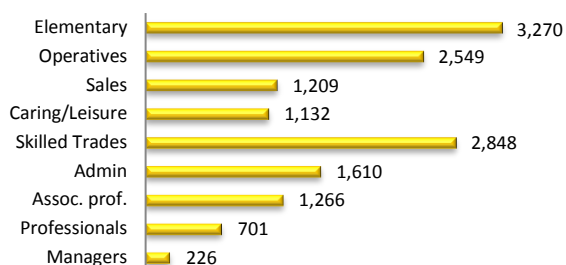
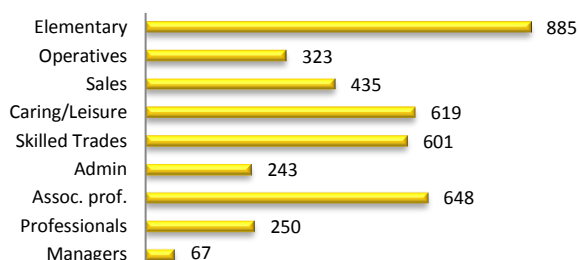


Figure 6.10b PES vacancies (Mid-West), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

PES job seekers and vacancies

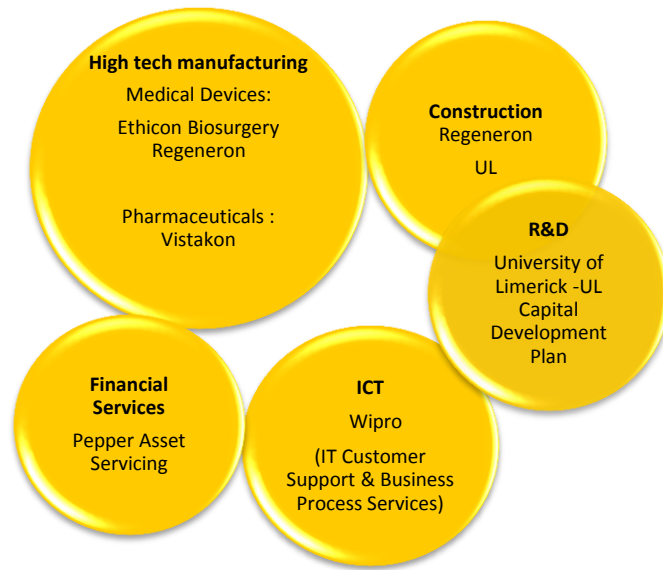
- In April 2014, there were 32,500 persons on the Live Register in the Mid-West region, 3,000 fewer than a year ago, or a decline of 8%; of these, 15% were younger than 25 and 61% were male
- In May 2014, 14,800 job seekers were registered with the PES in the region; the highest number had previously worked in elementary occupations (construction, process, catering and security), skilled trades (carpenters, bricklayers, painters, plasterers) or as operatives (process operatives, transport operatives); a considerable number also previously worked in various administrative roles
- In 2014, approximately 4,000 vacancies were advertised through DSP Jobs Ireland for the region; the highest number of vacancies was for elementary occupations (security guards), associate professionals (business sales executives), caring/leisure and personal services (care workers and home carers), skilled trades (chefs), and sales staff (retail sales assistants).



Employment growth and job creation

- Over the period quarter 4 2012 to quarter 4 2013, employment increased by 1% in the Mid-West; however, the change in employment varied by sector:
- Employment in agriculture, industry and other activities expanded over the same period; conversely, employment contracted in wholesale and retail, construction and financial services
- Recent job announcements suggest that over the short to medium term, job opportunities will arise in high tech manufacturing, ICT services (e.g. ICT customer support), and financial services; moreover, about 700 construction related jobs are expected to be created over the lifetime of the UL Development Plan, together with 290 full-time high value education and research positions; almost 600 construction related jobs are set to arise from investment by Regeneron Pharmaceuticals.

Figure 6.11 Job creation announcements (Mid-West), 2013 & 2014



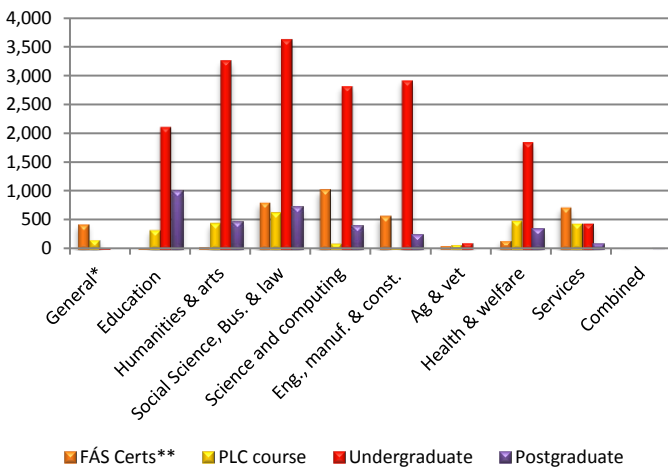
Source: Analysis by SOLAS (SLMRU) based on various sources

Education and training enrolments

In 2013, there were almost 27,000 learners and/or certificates in selected further and higher education and training; there were:

- almost 3,800 FÁS certificates: more than a quarter were in science and computing, a further fifth were in social science, business and law, and almost a fifth were in services
- almost 2,700 PLC enrolments: the highest number of enrolments was in social science, business and law (amounting to 23% of the total), followed by health and welfare (18%); combined, humanities and arts and services (16% each) made up almost a further third
- approximately 17,200 undergraduate enrolments: social science, business and law made up 21% of the total, with humanities and arts accounting for a further 19%; science and computing accounted for 16%
- almost 3,300 postgraduate enrolments: 31% were in education; over a fifth were in social science, business and law, 12% in science and computing and a further 15% were in arts and humanities.

Figure 6.12 FÁS Certs, PLC courses & higher education enrols (Mid-West), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning
 ** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Early school leaving: the ESL rate in the Mid-West region was 7% in quarter 4 2013.

Census (2011) data by county

Table 6.1. Persons at work and unemployed in the Mid-West region by county, Census 2011

	Clare	Limerick	North Tipperary	Total Mid-West
At work	32%	49%	19%	100%
Unemployed	30%	52%	18%	100%

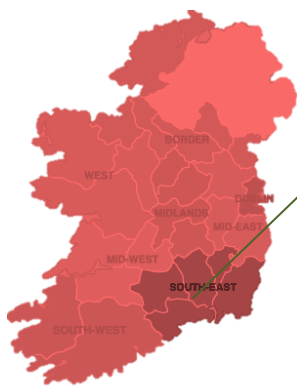
Source: CSO Census 2011

Table 5.1 shows Mid-West employment by county in 2011. Limerick accounted for half of all persons both at work and unemployed in the Mid-West region; Clare accounted for almost a further third and North Tipperary for approximately a fifth.

Key points from the Census 2011 data include:

- Occupation:** No county in the Mid-West region reached the national average (39%) for persons at work in high skilled occupations (managers, professionals and associate professionals); the share was particularly low in North Tipperary (at 33%). All counties had a higher share of persons at work in skilled trades, with this occupation accounting for 22% of employment in North Tipperary (compared to 15% nationally)
- Sector:** North Tipperary had the highest share of persons at work in agriculture at 11% (compared to 5% nationally); all counties had a higher than average share of persons at work in industry and lower than average shares of persons at work in financial and professional activities, admin and information and communication
- Education:** When compared both to the other counties in the Mid-West and nationally, North Tipperary had the highest share of persons at work with lower secondary education or less and the lowest share of persons at work with third level qualifications
- Age:** Persons at work in both Clare and North Tipperary were less likely to be aged 25-34 years and more likely to be in the older age cohorts than the national average (24% compared to 30%); in Limerick the age distribution was similar to that of the national average
- Unemployment:** Unemployment for those previously employed in industry was higher than average in all counties, but particularly in Limerick; North Tipperary had the highest share of persons unemployed aged under 25 of all counties in this region

7. South-East

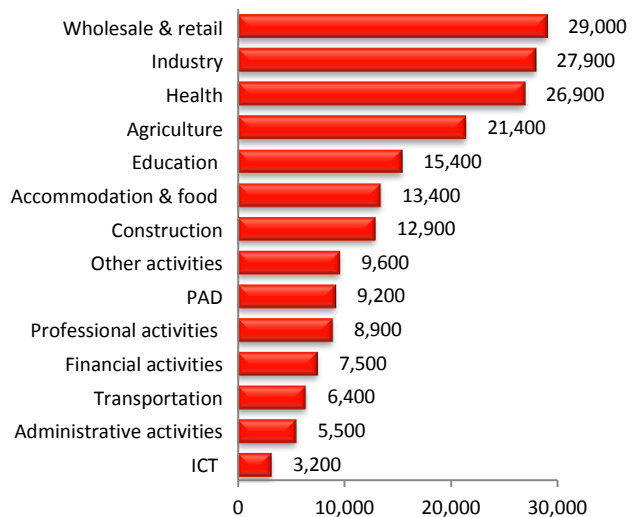


Population	505,900
Working age (15-64)	327,000
Labour force	233,300
Employment	197,100
Unemployment	36,200
Employment rate	58.0%
Unemployment rate	15.5%
Participation rate	59.1%
GVA p.p. basic prices (€):	22,610
GVA index (State =100):	70.0

Employment by sector

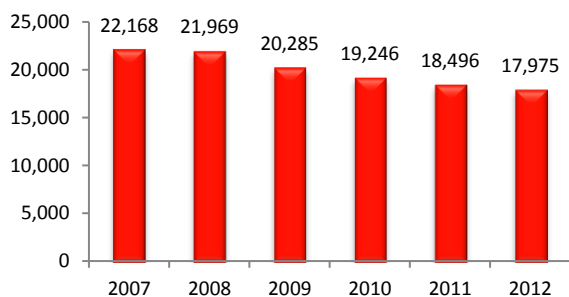
- In quarter 4 2013, wholesale and retail was the largest sector in the South-East region employing 29,000, closely followed by industry, employing approximately 28,000 persons
- The public sector (PAD, health and education combined) employed just over 51,000 persons, accounting for one quarter of total employment in the region
- Agriculture was the fourth largest sector, with almost 21,500 persons employed
- High value added knowledge intensive market, financial and high tech services combined accounted for 10% of the region's employment.

Figure 7.1 Employment by broad economic sector (South-East), Q4 2013



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

Figure 7.2 Active enterprises: Business economy* (South-East)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

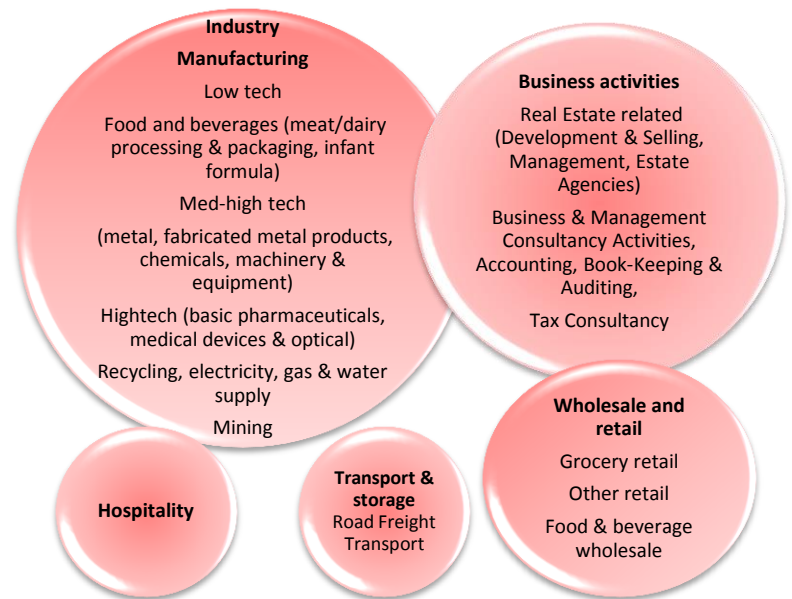
Active enterprises

- In 2012, there were almost 18,000 active enterprises in the South-East region
- Wholesale and retail and construction had the most enterprises, with approximately 4,700 and 3,800 respectively, followed by professional activities (2,100)
- The number of active enterprises has continued to decline: in 2012 there were approximately 500 fewer than in 2011 and almost 4,200 fewer than in 2007; construction alone accounted for about three quarters of the decline since 2007
- Just 1% of active enterprises were medium sized (with 50-249 persons engaged); 92.5% were micro (with less than 10 persons engaged).

Medium to large enterprises by sector

- In the South-East region, the highest number of medium to large enterprises is operating in a range of business activities, wholesale and retail, construction, and industry (mostly manufacturing, but also recycling, electricity, gas and water supply, and mining)
- There are also some medium to large enterprises in hospitality (hotels and restaurants) services and transport.

Figure 7.3 Sectors with largest enterprises (South-East)



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 7.4a Industrial units (South-East)

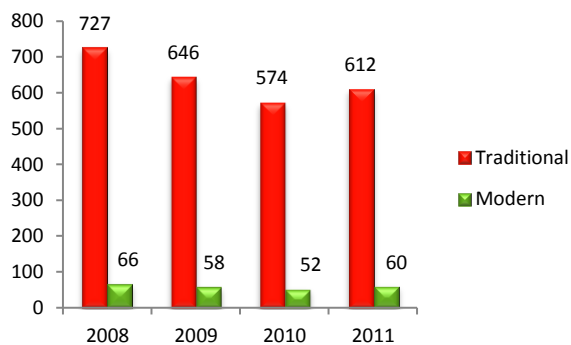
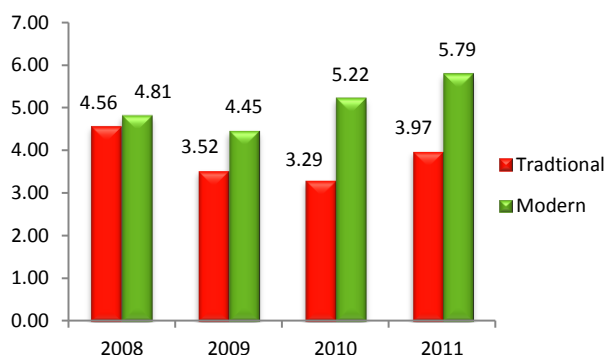


Figure 7.4b Gross output in industrial units (South-East), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €22,610; GVA index (State=100): 70.0
- GVA share, % of State's total: 7.6%

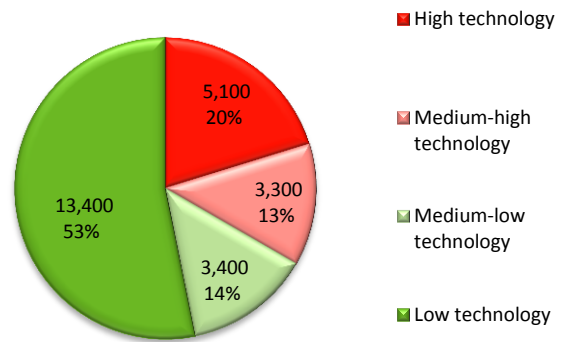
Industrial activity

- In 2011, 91% of all industrial units (manufacturing, energy and utilities) in the South-East region were in the traditional sector; 9% were in the modern sector
- The number of industrial units increased between 2010 and 2011 for both sectors (modern and traditional), the first such increase since 2008
- While less than 10% of industrial units were in the modern industry sector, they produced nearly 60% of the region's gross value of industrial output in 2011
- The value of gross output in both the modern and traditional sectors increased between 2010 and 2011.

Manufacturing employment

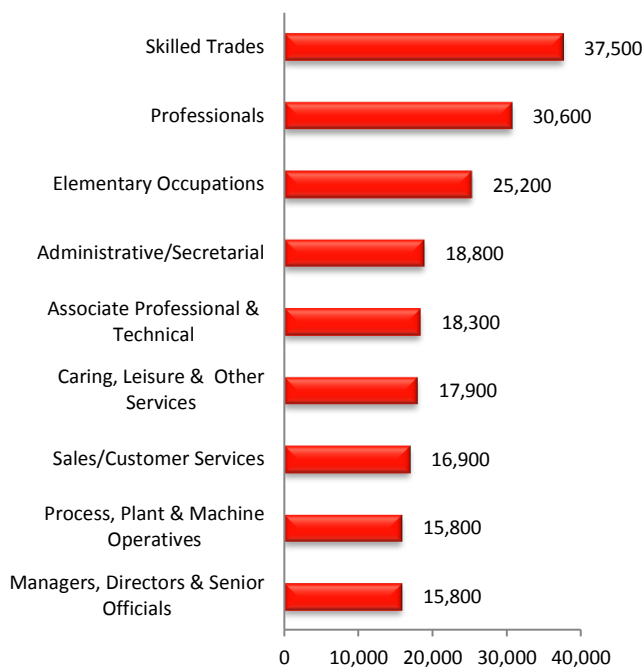
- In quarter 4 2013, approximately 25,300 persons in the South-East region were employed in manufacturing
- Low tech manufacturing was the largest segment, employing more than one half of all persons engaged in manufacturing; there were approximately 7,500 persons engaged in food processing and beverage related activities; the South-East region’s share of employment in low tech manufacturing was well above the national average
- Medium-low tech and medium-high tech manufacturing segments each employed almost one-in-seven of all persons engaged in manufacturing
- High tech manufacturing accounted for one fifth of manufacturing employment, which was below the national average.

Figure 7.5 Manufacturing employment (South-East), Q4 2013



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

Figure 7.6 Employment by broad occupation (South-East), Q4 2013 *



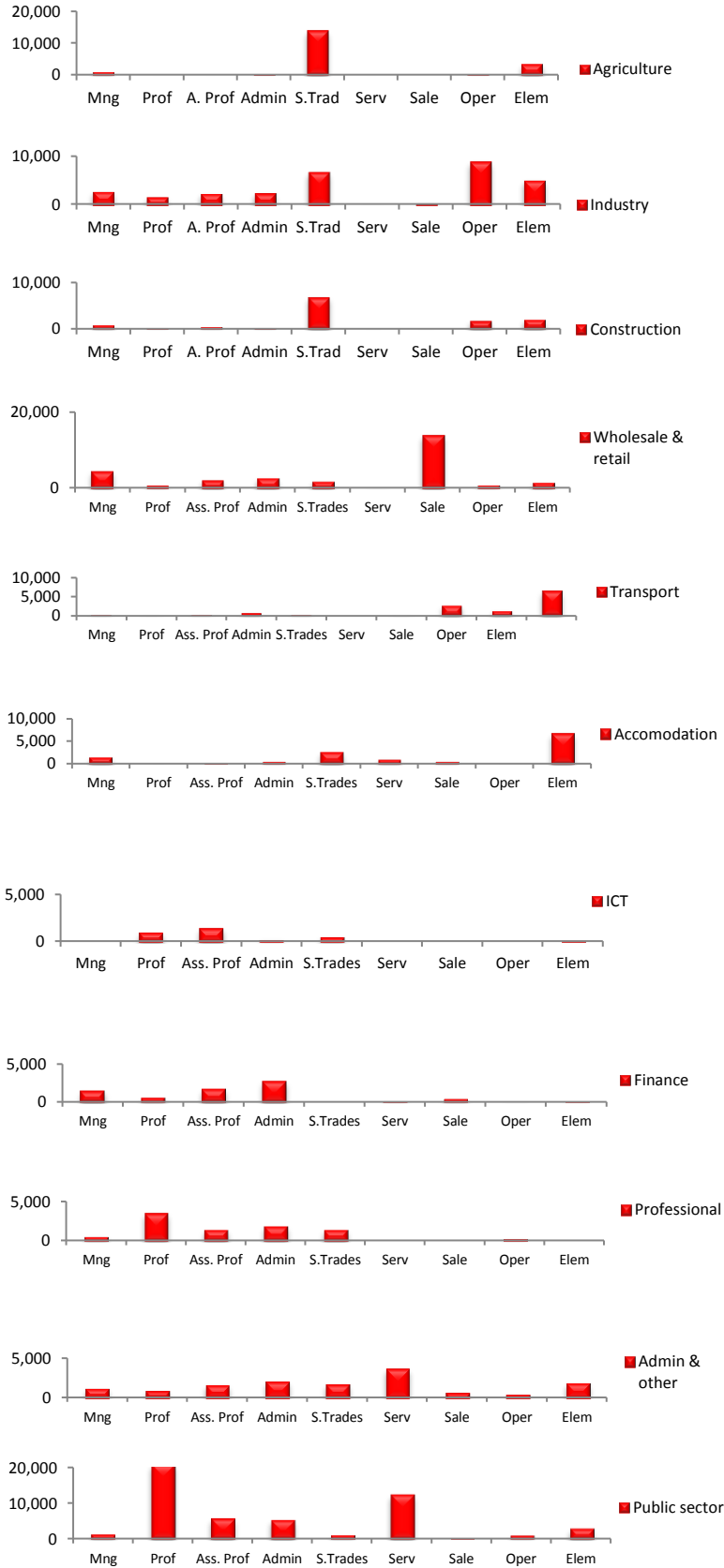
Source: Analysis by SOLAS (SLMRU) based on CSO data

*Those whose occupation was not known/stated are not depicted

Employment by occupation

- In quarter 4 2013, 37,500 persons in the South-East region were employed in skilled trades, accounting for one-in-five of the region’s total employment; of these, one quarter were farmers
- With almost 31,000 persons employed, professionals were the second largest occupational grouping; they accounted for 16% of total employment, while associate professionals accounted for 9% of the total
- Caring, leisure and other services employed approximately 18,000 persons or 9% of the total
- Elementary workers accounted for almost one-in-eight of total employment in the region, while those working as operatives accounted for about one-in-twelve.

Figure 7.7 Employment by broad occupation and sector (South-East) (000s), Q4 2013



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

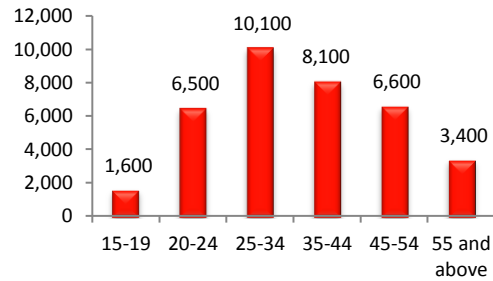
Employment by occupation and sector

- In quarter 4 2013, professional workers accounted for two-in-five of all those employed in the public sector (combining PAD, education and health) and professional services
- Employment in professional and associate professional occupations combined accounted for more than one half of employment in the above sectors (i.e. public and professional services), and about three quarters in the information and communications sector
- Professional workers accounted for almost one half of all persons employed in the health segment, and almost three quarters in education
- Employment in elementary occupations accounted for almost one half of employment in the accommodation and food sector
- Within occupational groups, the highest employment was in the following occupations:
 - **Managers:** functional managers, hotel and accommodation managers and proprietors, managers/proprietors in wholesale and retail
 - **Professionals:** teachers, nurses and midwives
 - **Associate professionals:** business sales executives, sales accounts and business development managers
 - **Admin:** Government clerks, finance admin occupations (e.g. bank clerks, payroll, book-keepers)
 - **Skilled trades:** chefs, farmers, metal working production and maintenance fitters
 - **Services:** childminders, carers/home carers, hairdressers
 - **Sales:** retail sales assistants, other sales related
 - **Operatives:** assemblers and routine, food and beverage process operatives, truck drivers
 - **Elementary:** construction workers, cleaners, waiting and bar staff, farm workers.

Unemployment

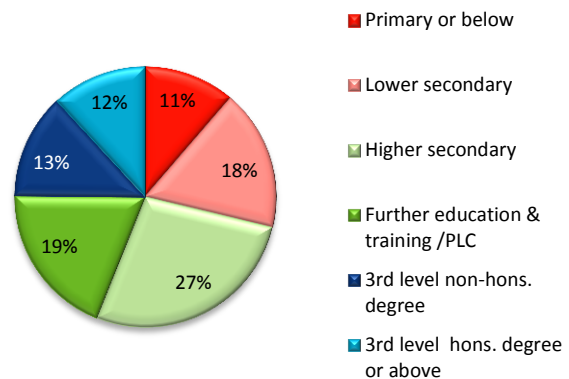
- In quarter 4 2013, there were 36,200 unemployed persons in the South-East region (defined in ILO terms); almost two thirds of these were long term unemployed
- **Age:** just over one fifth of those unemployed in the region were aged under 25; the youth unemployment rate was 33%, above the national average rate of 24%
- **Education:** of all those unemployed in the South-East who stated their highest level of education, 29% had attained at most lower secondary education, 27% had higher secondary, almost a fifth had PLC/FET, and one quarter had some third level qualification
- **Sector:** one-in-five unemployed persons in the region had previously worked in the construction sector, and one-in-twelve in industry
- **Occupation:** most of the unemployed in this region had previously worked in elementary occupations, in skilled trades, and as operatives.

Figure 7.8 Unemployment by age (South-East), Q4 2013



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

Figure 7.9 Unemployment by education (South-East), Q4 2013



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

Figure 7.10a PES job seekers (South-East), May 2014

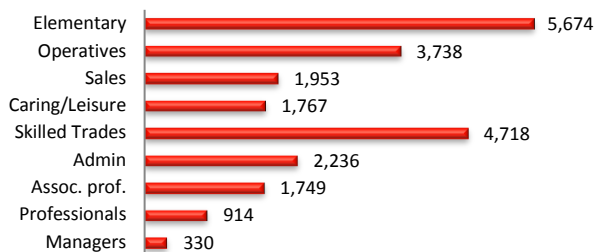
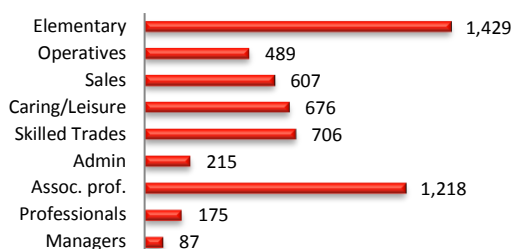


Figure 7.10b PES vacancies (South-East), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

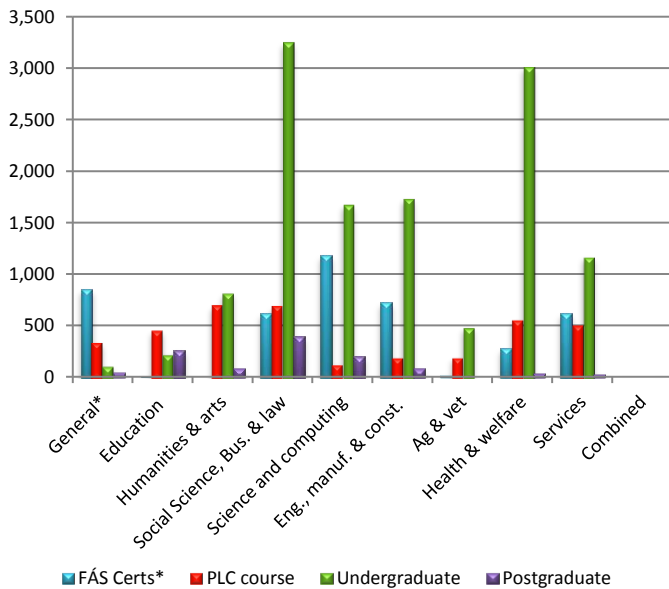
PES job seekers and vacancies

- In April 2014, there were 51,000 persons on the Live Register in the South-East region (approximately 4,000 fewer than a year ago); of these, 15% were under 25 years and 62% were male
- In May 2014, over 23,000 job seekers were registered with the PES in the region; the highest number of job seekers (almost 5,700, or one quarter of the total number) had previously worked in elementary occupations (process plant, construction), one fifth in skilled trades, one-in-six as operatives, and one-in-ten in administrative occupations
- In 2013, over 5,600 vacancies were advertised through DSP Jobs Ireland in the region; the highest number of vacancies (1,400) was for elementary occupations (security guards, kitchen and catering assistants and cleaners); this was followed by approximately 1,200 vacancies for associate professionals (business sales executives, IT user support technicians, sales and marketing associate professionals, etc.); there was also a sizeable number of vacancies for skilled trades, caring, sales and customer service occupations.

Employment growth and job creation

- Over the period quarter 4 2012 to quarter 4 2013, employment increased by 8% in the South-East region, well above the national average rate of growth
- The strongest growth was observed in health and social work and agriculture, while discernible increases also occurred in wholesale and retail, financial and professional services, and to a lesser extent, in education; at the same time, employment declined in industry, the only sector to contract over the period
- According to recent job announcements, job opportunities over the short to medium term will primarily arise in research and development and high skilled biopharma activities (e.g. Eirgrin), as well as certain segments of ICT; in addition, there will be a number of construction related jobs associated with the development of the IDA Technology Park in Waterford.

Figure 7.12 FÁS Certs, PLC courses & higher education enrols (South-East), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning
 ** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Figure 7.11 Job creation announcements (South-East), 2013 & 2014



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

Education and training enrolments

In 2013, there were almost 21,700 learners and/or certificates in selected further and higher education and training; there were:

- Almost 4,300 FÁS certificates: technology related fields (i.e. science/computing and engineering etc.) made up 44% of all certs; a further fifth were for general programmes
- Almost 3,800 PLC enrolments: almost two fifths were in either humanities and arts or in social science business and law; a further 15% were in health and welfare
- Approximately 12,500 undergraduate enrolments: more than a quarter were in social science, business and law; health and welfare made up almost a further quarter, and technology related fields (i.e. science and computing and engineering, etc.) accounted for 27%
- Over 1,100 postgraduate enrolments: social science, business and law accounted for more than a third (35%), education for almost a quarter, and science and computing for almost a fifth.

Early school leaving from education and training: in quarter 4 2013, the ESL-rate was 13% exceeding the national average rate of 8%.

Census (2011) data by county

Table 7.1. Persons at work and unemployed in the South-East region by county, Census 2011

	Carlow	Kilkenny	South Tipperary	Waterford	Wexford	Total South-East
At work	11%	20%	18%	23%	28%	100%
Unemployed	12%	18%	17%	23%	32%	100%

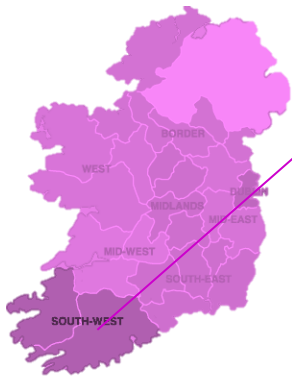
Source: Census 2011

Table 7.1 shows the number of persons at work in the South-East by county in 2011. Wexford accounted for the largest share of employment in this region at 28%, followed by Waterford at 23%; Carlow accounted for the smallest share at 11%.

Key points from the Census 2011 data include:

- **Occupation:** All counties in the South-East region had a lower than the national average share (39%) of persons at work in high skilled occupations (managers, professionals and associate professionals), the lowest share was recorded in South Tipperary; all counties had a higher share than the national average of persons at work in skilled trades and all, excluding Kilkenny, had a higher share in operative occupations.
- **Sector:** South Tipperary, Waterford and Carlow had a higher than average share of persons employed in industry. All counties had a lower than average shares of persons at work in financial and information and communication activities.
- **Education:** For persons at work, all counties had a higher than average share of persons with lower secondary education or less, particularly Wexford and South Tipperary; all counties also had a lower than average share of persons at work with third level qualifications.
- **Age:** The share of unemployed persons aged less than 25 years was highest in South Tipperary at 22% and lowest in Kilkenny at 18%.
- **Unemployment:** The share of persons previously employed in the construction sector was highest in Kilkenny and Wexford; Waterford had the highest share of persons previously employed in industry.

8. South-West

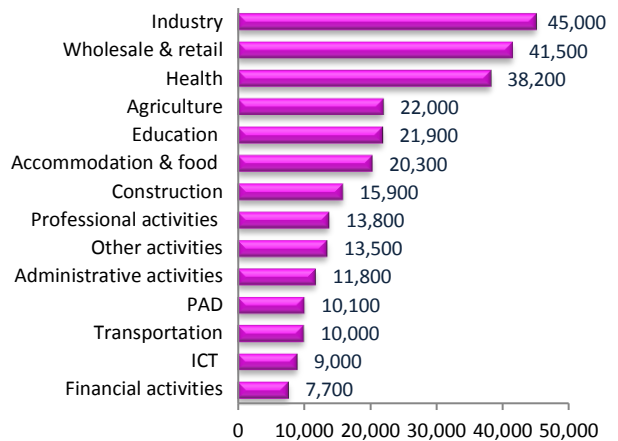


Population	674,700
Working age (15-64)	442,400
Labour force	312,400
Employment	280,600
Unemployment	31,800
Employment rate	61.5%
Unemployment rate	10.2%
Participation rate	58.7%
GVA per person (€):	42,311
GVA index (State =100):	131.0

Employment by sector

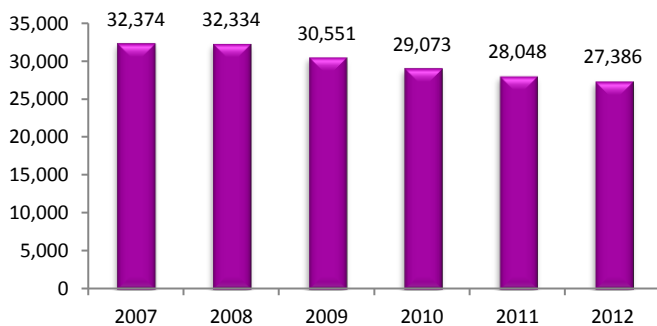
- In quarter 4 2013, industry employed 45,000 persons in the South-West region; of these, 41,000 worked in manufacturing and 4,000 in utilities
- With approximately 70,000 employed, the public sector (health, PAD and education combined) accounted for one quarter of all persons employed in the region
- Services sectors accounted for 70% of total employment; knowledge-intensive market, high tech and financial services combined accounted for 11% of the region's employment
- Wholesale and retail was the second largest single sector of employment, with 41,500 persons, while agriculture was the fourth largest, with 22,000 persons.

Figure 8.1 Employment by broad economic sector (South-West), Q4 2013



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

Figure 8.2 Active enterprises: Business economy *(South-West)



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

* The private business economy covers the NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

Active enterprises

- In 2012, there were almost 27,400 active enterprises in the South-West region, almost 700 fewer than in 2011; most of this decline was accounted by active enterprises in construction
- Between 2007 and 2012, the number of active enterprises decreased by approximately 5,000; active enterprises in construction accounted for over four fifths of the decline (in 2012, there were approximately 4,000 fewer enterprises in construction than in 2007)
- Wholesale and retail had the largest number of enterprises in 2012, accounting for 23% of the total; despite the decline (by 500, or 8% between 2011 and 2012), construction still accounted for one fifth of all active enterprises in 2012, followed by professional activities, at 17%
- The vast majority (91%) of enterprises had fewer than 10 persons engaged.

Medium to large enterprises by sector

- The highest number of medium to large enterprises in the South-West region is found in a range of business services, wholesale and retail, and industry (mainly manufacturing, e.g. computer and other information processing equipment, food and beverages, pharmaceuticals, etc.), but also in the production and distribution of electricity, extraction of crude petroleum and natural gas)
- There are also a number of medium and large enterprises engaged in hospitality and computing and telecommunication activities.

Figure 8.3 Sectors with largest enterprises (South-West), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 8.4a Industrial units (South-West)

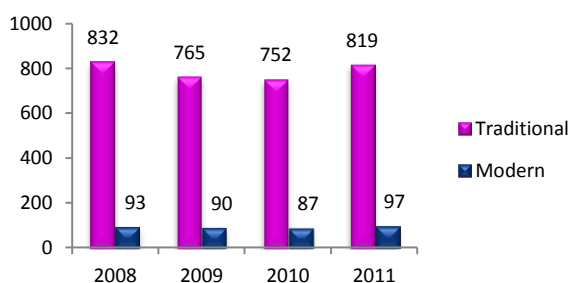
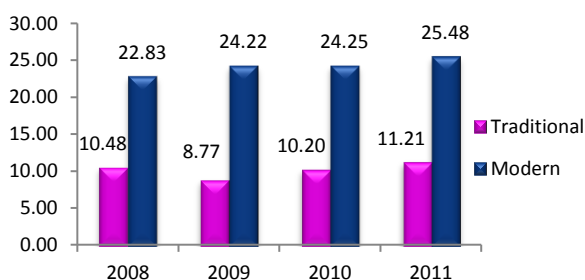


Figure 8.4b Gross output in industrial units (South-West), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €42,311; GVA index (State =100): 131.0
- GVA (share, % of State's total): 19

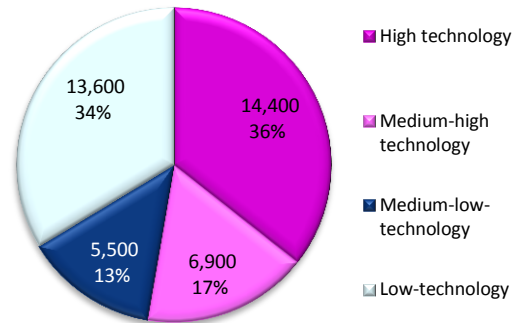
Industrial activity

- In 2011, 90% of all industrial units (manufacturing, energy and utilities) in the South-West region were in the traditional sector
- The number of industrial units increased between 2010 and 2011 for both sectors (modern and traditional)
- While 10% of industrial units were in the modern industry sector, they produced almost 70% of the regional gross industrial output value in 2011
- The value of gross output in the modern sector increased from €24.3 billion in 2010 to €25.5 in 2011, while the value of gross output in the traditional sector increased from €10.2 billion to €11.2 billion; the region accounted for about one third of State's industrial output.

Manufacturing employment

- In quarter 4 2013, approximately 40,500 persons in the South-West region were employed in manufacturing
- High tech manufacturing (e.g. pharmaceuticals, electronics, optical products, etc.) was the largest segment accounting for 36%; this was above the national average and was amongst the highest shares for high tech employment across all regions
- Medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) combined accounted for 30% of manufacturing employment
- Low-tech manufacturing accounted for almost a third; within this segment, food processing and beverages alone accounted for one fifth of total manufacturing employment.

Figure 8.5 Manufacturing employment (South-West), Q4 2013



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

Employment by occupation

- In quarter 4 2013, approximately 52,500 persons in the South-West were employed in skilled trades, accounting for almost a fifth of total employment in the region; almost a third of those employed in skilled trades (and 6% of total employment) were farmers
- Employment in professional occupations was the second highest, totalling almost 48,000 persons
- Employment in associate professionals was the fourth highest, with 29,600 persons
- There were almost 30,000 persons employed in elementary occupations
- Just over 24,000 persons were working as operatives, and there were almost identical numbers working in sales/customer service, and caring and other personal services occupations.

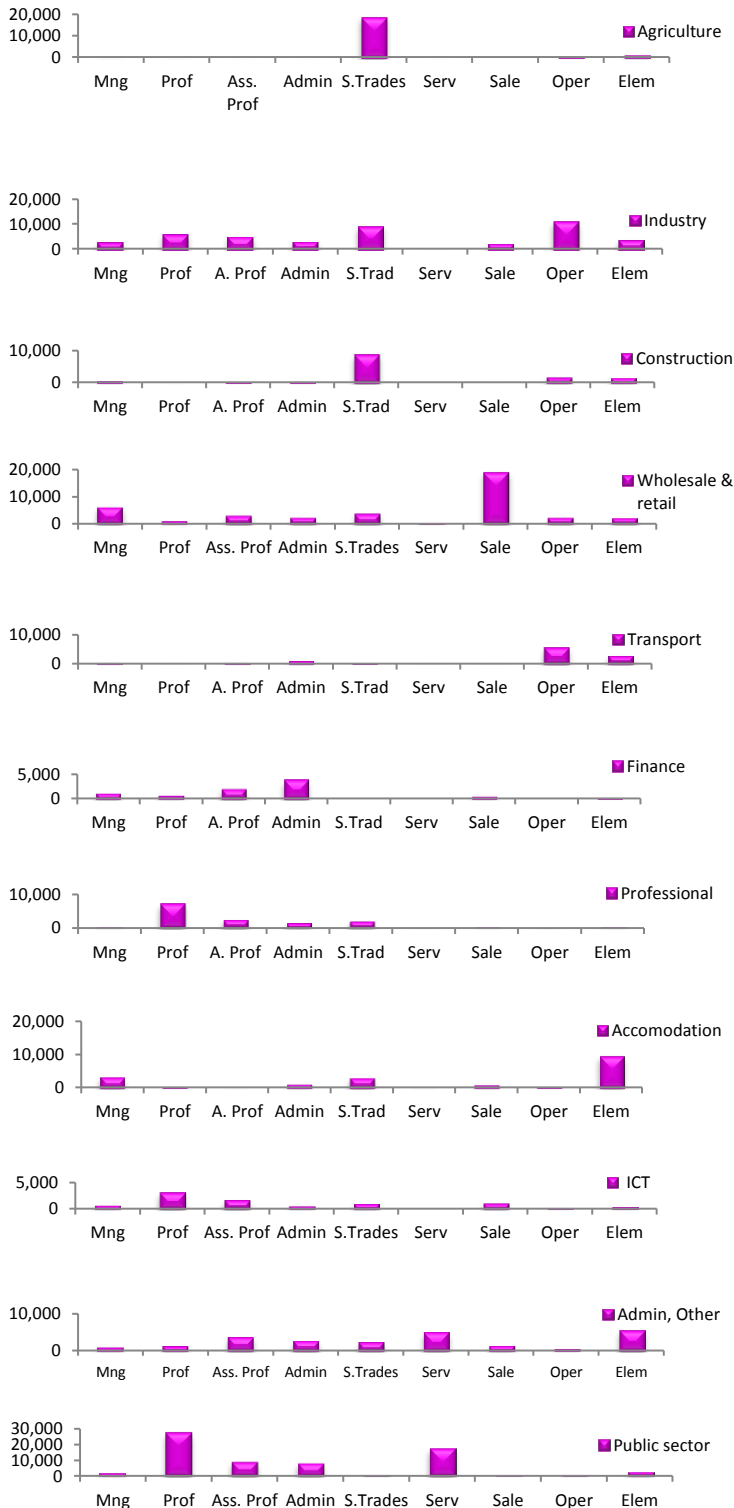
Figure 8.6 Employment by broad occupation (South-West), Q4 2013 *



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

* Those whose occupation was not known/stated are not depicted.

Figure 8.7 Employment by broad occupation and sector (South-West) (000s), Q4 2013



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

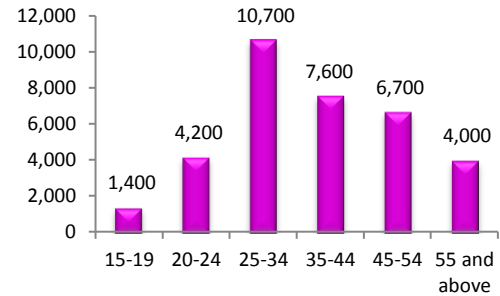
Employment by occupation and sector

- In quarter 4 2013, operatives comprised one quarter of employment in industry and three fifths in transport
- Skilled trades made up two thirds of employment in construction and one fifth in industry
- Approximately one half of total employment in accommodation and food services was in low skilled elementary occupations
- Professional workers accounted for two-in-five of all those employed in the public sector (combining PAD, education and health) and for one-in-three in the information and communications sector
- Employment in associate professional occupations accounted for a sizeable share of employment in financial services (almost 25%), ICT (20%), professional services (16%), and the public sector (14%)
- Within occupational groups, the highest employment was in the following occupations:
 - **Managers:** functional managers/directors, managers/proprietors in wholesale/retail, production managers and directors in manufacturing
 - **Professionals:** teachers, nurses and midwives, accountants, IT professionals, medical practitioners, and engineering professionals
 - **Associate professionals:** business sales executives, sales accounts and business development, gardaí, technicians (e.g. laboratory, IT operations)
 - **Secretarial/admin:** Government clerks, and finance admin occupations (e.g. bank clerks, wages clerks), PA and generic admin
 - **Skilled trades:** farmers, metal working production and maintenance fitters, chefs
 - **Services:** carers, childminders, hairdressers and related occupations
 - **Sales:** retail sales assistants
 - **Operatives:** drivers (taxi, goods vehicles) routine and chemical process operatives
 - **Elementary:** construction workers, cleaners, catering staff, elementary storage occupations.

Unemployment

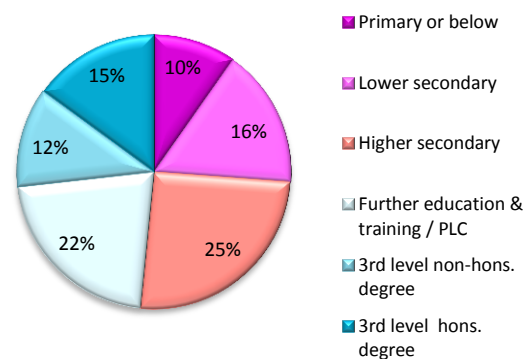
- In quarter 4 2013, there were approximately 32,000 unemployed persons in the South-West region (defined in ILO terms); at 10.2%, the unemployment rate was the second lowest of all regions
- Age:** at 18%, this region had a lower than national average share of unemployed persons aged under 25; the unemployment rate for this age group was 20%, below the average rate nationally
- Education:** of those unemployed in the region who stated their highest level of educational attainment, 27% had a third level qualification (a relatively high share), while 26% had at most lower secondary education
- Sector:** one-fifth of all unemployed persons in this region had previously been employed in construction; one-in-ten had previously been employed in industry or wholesale and retail
- Occupation:** 22% of all unemployed persons in the South-West had previously worked in skilled trades, one of the highest shares of all regions; a sizeable number had previously worked in elementary occupations.

Figure 8.8 Unemployment by age (South-West), Q4 2013



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

Figure 8.9 Unemployment by education (South-West), Q4 2013



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

Figure 8.10a PES job seekers (South-West), May 2014

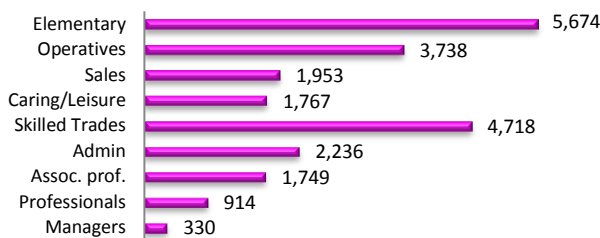
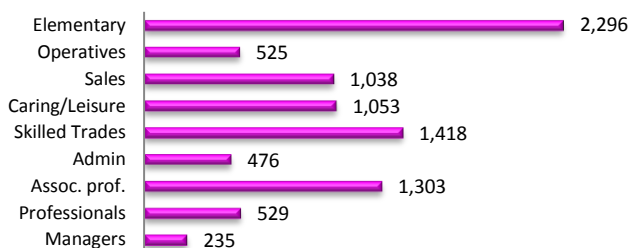


Figure 8.10b PES vacancies (South-West), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

Live Register, PES job seekers and vacancies

- In April 2014, there were 51,400 persons on the Live Register in the South-West region, almost 5,000 fewer than a year previously (a 9% year-on-year decline); of these, 13% were younger than 25 years of age, and 61% were male
- In May 2014, approximately 21,000 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (construction, process plant, catering/hospitality), skilled trades (carpenters, bricklayers, painters), or as operatives (process operatives)
- In 2013, approximately 8,900 vacancies were advertised through DSP Jobs Ireland; at almost 2,300, the highest number of vacancies was for elementary occupations (kitchen and catering assistants, waiters and cleaners); there were over 1,400 vacancies for skilled trades and 1,300 vacancies for associate professionals; there were about 1,000 vacancies for positions in personal services (care workers and home carers) and sales (sales and retail assistants).

Employment growth and job creation

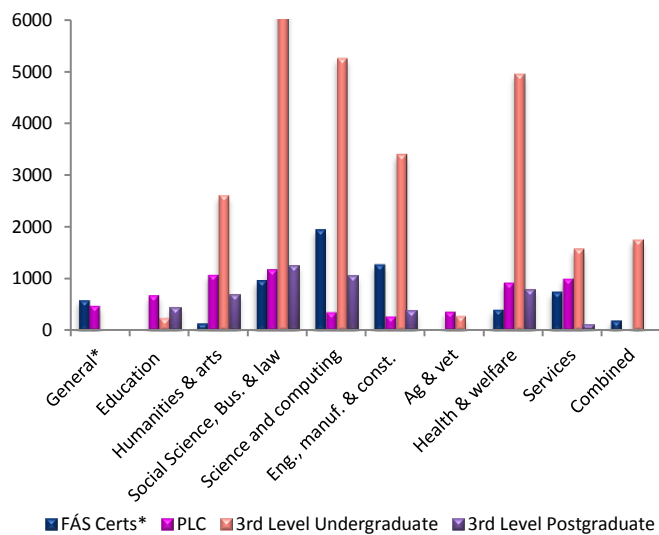
- Over the period quarter 4 2012 to quarter 4 2013, employment increased by just above 1%
- The relatively strongest growth occurred in agriculture; a relatively large increase was also observed in the ICT sector and administrative services, while in both industry and food and accommodation services relatively small increases were observed; wholesale and retail, financial services, transport, construction and PAD contracted over the period.
- Recent job announcements suggest that over the short to medium term job opportunities will be associated with a range of roles in ICT (mobile telephony, IT/computer related services), in financial services, and in certain segments of manufacturing (biopharma, food, etc.), as well as in the development of technologies associated with 'green skills'.

Figure 8.11 Job creation announcements (South-West), 2013 & 2014



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

Figure 8.12 FÁS Certs, PLC courses & higher education enrolls (South-West), 2013



Source: DES, HEA

* Includes broad and combined fields of learning
 ** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued to FÁS learners; higher education and PLC enrolments refer to the 2012/2013 academic year

Education and training enrolments

In 2013, there were almost 43,500 learners and/or certificates in selected further and higher education and training; there were:

- over 6,200 FÁS certificates: more than one half were in technology related fields (i.e. science/computing and engineering etc.), with a further 15% in social science, business and law
- almost 6,300 PLC enrolments: almost a fifth of learners were in social science, business and law; this was followed by humanities and arts (17%), services (16%) and health and welfare (15%); combined, these four fields made up two thirds of all PLC enrolments
- approximately 26,300 undergraduate enrolments: almost a quarter were in social science, business and law; science and computing made up a fifth, while almost a further fifth were in health and welfare
- over 4,700 postgraduate enrolments: the largest share of enrolments was in social science business and law (26%), followed by science and computing (22%); health and welfare accounted for 17% of the total.

Early school leaving: the ESL rate was 7% in quarter 4 2013.

Census (2011) data by county

Table 8.1. Persons at work and unemployed in the South-West region by county, Census 2011

	Cork	Kerry	Total South-West
At work	79%	21%	100%
Unemployed	75%	25%	100%

Source: CSO Census 2011

Table 8.1 shows South-West employment by county in 2011. Cork accounted for 79% of employment; while Kerry accounted for just over a fifth of persons at work in the South-West region, it accounted for a quarter of all unemployed persons in the region.

Key points from the Census 2011 data include:

- Occupation:** 38% of persons at work in Cork were employed in high skilled occupations (managers, professionals and associate professionals) compared to 32% for Kerry (and a national average of 39%). At, 16% and 22% respectively, both Cork and Kerry had a higher than average (at 15%) share of persons at work in skilled trades.
- Sector:** Employment in Cork was primarily in industry, wholesale/retail and health; Kerry had a higher share of persons at work in agriculture and accommodation/food services than both Cork and nationally.
- Education:** While the South-West region had an average share of persons at work with lower secondary education or less, this masks a higher than average share for Kerry at 21% and a lower than average share for Cork at 17% (the national average being 18%). A third of persons at work in Kerry had third level qualifications compared to 38% for Cork.
- Age:** The share of unemployed persons aged less than 25 years was lower than the national average for both counties.
- Unemployment:** Both counties had a higher than average share of unemployed persons who had previously worked in skilled trades.

9. West

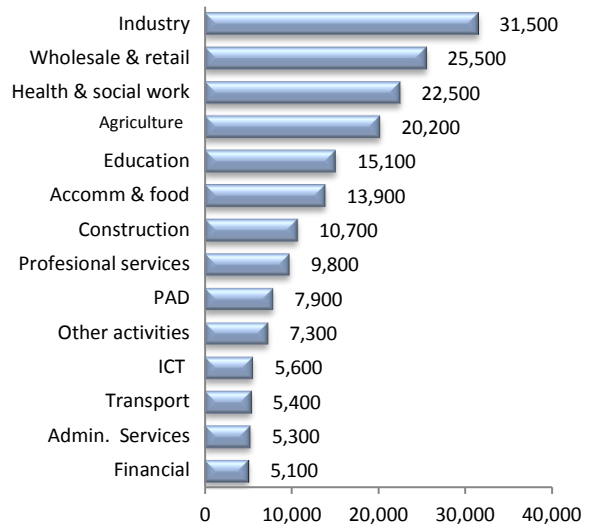


Population	434,700
Working age (15-64)	278,800
Labour force	210,900
Employment	185,900
Unemployment	25,000
Employment rate	63.6%
Unemployment rate	11.9%
Participation rate	62.2%
GVA (Gross Value Added) per person (€)	26,933
GVA index (State =100)	84.0

Employment by sector

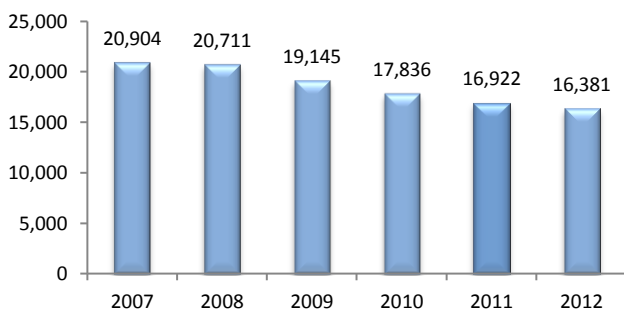
- In quarter 4 2013, industry was the largest sector of employment in the West region, employing 31,500 persons; this was followed by wholesale and retail, with 25,500 persons employed
- Public sector employment (comprising health, education, and PAD) totalled 45,600 persons, accounting for one quarter of the region's total employment
- Agriculture was the fourth largest sector of employment in the West - accounting for 11% of the total employment
- High value added services - knowledge intensive market, financial and high tech services -accounted for 11% of the region's total employment

Figure 9.1 Employment by broad economic sector (West), Q4 2013



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

Figure 9.2 Active enterprises: Business economy* (West)



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

* The private business economy covers NACE Rev. 2 sectors B-N (excluding NACE code 64.20 activities of holding companies from sector K)

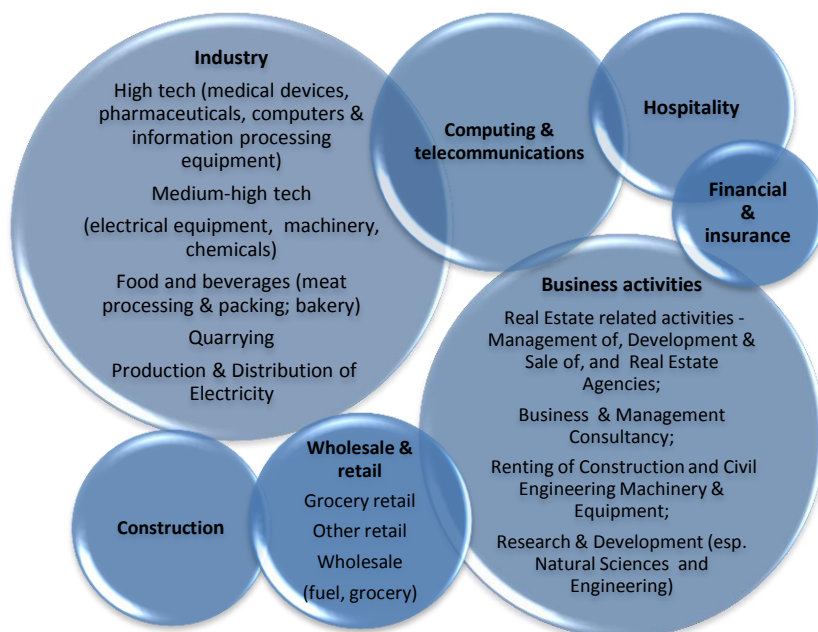
Active Enterprises

- In 2012, there were almost 16,400 active enterprises in the West region, 3% fewer than in 2011
- When compared to 2007, the number of active enterprises declined by approximately 4,500, or 22%
- Wholesale and retail had the largest number of enterprises (approximately 4,000 or almost a quarter of the total); construction accounted for 23%, while accommodation and food and professional services each accounted for 12% of the total active enterprises in 2012
- Over 91% of active enterprises had fewer than 10 persons engaged.

Medium to large enterprises by sector

- The highest number of medium to large enterprises in the West region is found in a wide range of business activities (mostly real estate related, business management and consultancy, and R&D activities), wholesale and retail, followed by industry (mainly manufacturing), construction, hospitality, and computing and telecommunications services
- There are also some large enterprises in financial and insurance services.

Figure 9.3 Sectors with largest enterprises (West), 2013



Source: Analysis by SOLAS (SLMRU) based on Experian database

Figure 9.4a Industrial units (West)

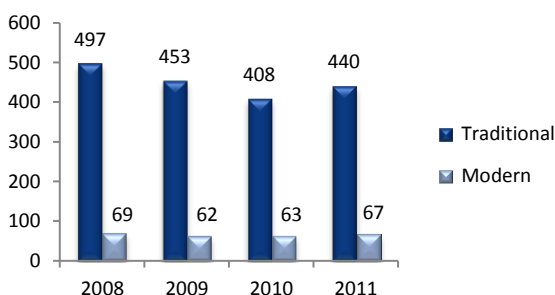
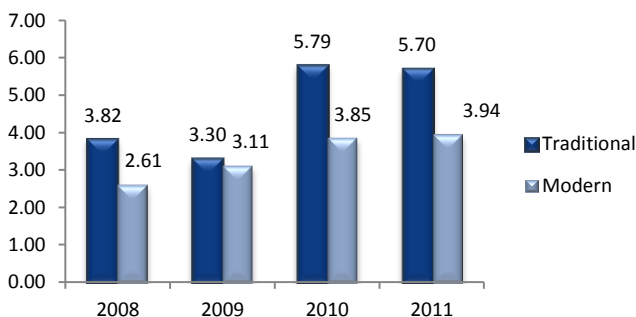


Figure 9.4b Gross output in industrial units (West), € billion



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

Regional economy output, Gross Value Added, 2011

- GVA per person: €26,933; GVA index (State=100): 84.0
- GVA (share, % of State's total): 8.1

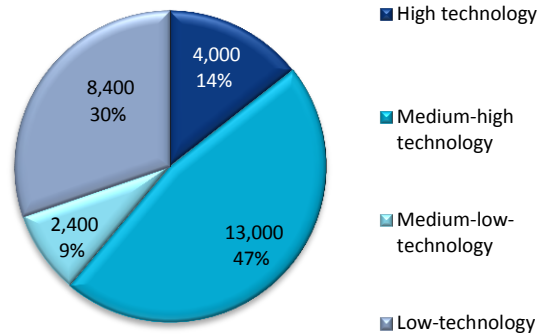
Industrial activity

- In 2011, 87% of all industrial units (manufacturing, energy and utilities) in the West region were in the traditional sector
- The number of industrial units increased for both sectors (modern and traditional) between 2010 and 2011; this was the first increase experienced by the traditional sector since 2008
- While the modern industry sector accounted for 13% of industrial units, it produced 41% of the region's gross industrial output value in 2011
- The value of gross output in the traditional sector declined marginally from €5.79 to €5.7 billion between 2010 and 2011, while the modern sector increased from €3.85 to €3.94 billion over the same period.

Manufacturing employment

- In quarter 4 2013, there were approximately 27,800 persons employed in manufacturing, amounting to 15% of the region’s total employment
- Employment was greatest in medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment, etc.), with 13,000 persons or accounting for almost one half of manufacturing employment; this region had the highest share of manufacturing employment concentrated in medium-high tech manufacturing
- There were a further 14% employed in high tech manufacturing (e.g. biopharma, electronics, optical products, etc.), while medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal, etc.) and low-tech manufacturing (e.g. food processing, wood, printing, etc.) accounted for 9% and 30% respectively; food processing alone accounted for one half of low tech manufacturing.

Figure 9.5 Manufacturing employment (West), Q4 2013



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

Employment by occupation

- In quarter 4 2013, the largest number in employment in the West were working in skilled trades (approximately 41,000) or accounting for 22% of total employment in the region; compared to quarter 4 2012, employment in this occupational group increased by approximately 30%; farmers accounted for 44% of overall employment in skilled trades and 10% of total regional employment
- Between quarter 4 2012 and quarter 4 2013, those employed as managers and directors and in administrative occupations also expanded
- Employment in professional occupations accounted for 17% of the region’s total employment, while employment in associate professional occupations accounted for 10%
- Employment in elementary and operative occupations accounted for 11% and 9% of total employment respectively.

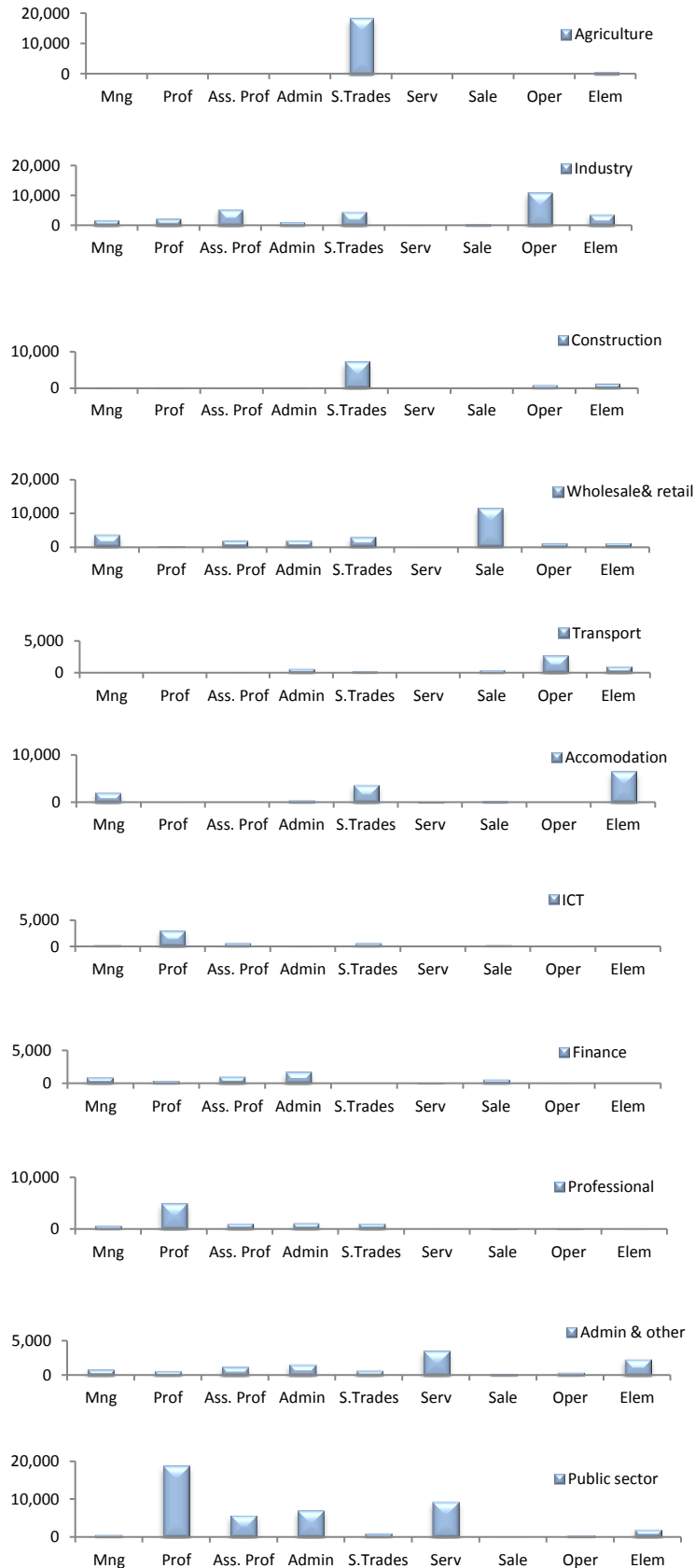
Figure 9.6 Employment by broad occupation (West), Q4 2013 *



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

* Those whose occupation was not known/stated are not depicted.

Figure 9.7 Employment by broad occupation and sector (West) (000s), Q4 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

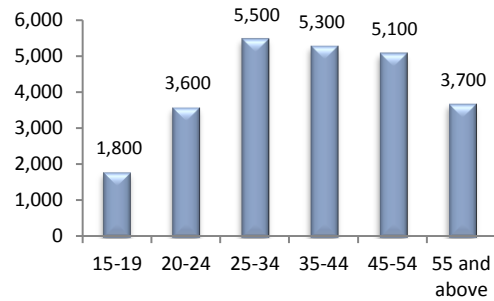
Employment by occupation and sector

- In quarter 4 2013, just over one third of those working in industry were operatives, approximately 12% were in elementary occupations, while 15% were in skilled trades occupations; at the same time, one fifth were working as either professionals or associate professionals
- Those employed in skilled trades accounted for about two thirds of employment in construction and 90% in agriculture
- Almost one half of those working in food and accommodation services were elementary workers
- The information and communication sector had the highest share of professional workers, at 55%; similarly, one half of all persons employed in professional services were professionals, while the corresponding figure in the public sector - (comprising public administration and defence (PAD), health, and education) - was 41%
- Within occupational groups, the highest employment was in the following occupations:
 - **Managers:** shopkeepers/proprietors, functional managers, production managers
 - **Professionals:** teachers, nurses and midwives, IT professionals, accountants
 - **Associate professionals:** sales and marketing related (e.g. business sales executives, sales accounts managers) science, engineering and technology associate professionals (e.g. laboratory technicians)
 - **Secretarial/admin:** Government clerks and finance occupations (e.g. bank clerks)
 - **Skilled trades:** farmers, food preparation trades (e.g. chefs), metal machining and related, electrical trades
 - **Services:** care workers, hairdressers and related, childcare workers
 - **Sales:** sales and retail assistants
 - **Operatives:** assemblers/routine operatives, drivers
 - **Elementary:** cleaners and domestics, construction workers, bar and waiting staff.

Unemployment

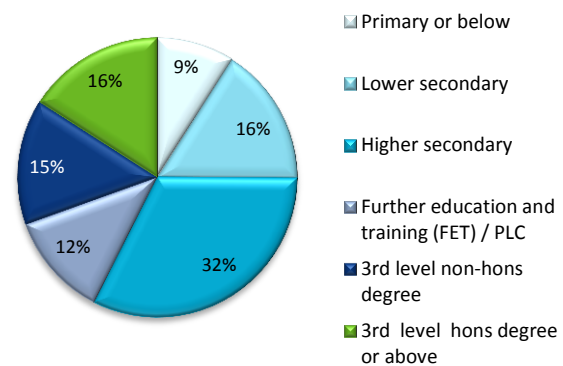
- In quarter 4 2013, there were 25,000 unemployed persons in the West region (defined in ILO terms); of these, almost three-in-five were unemployed for at least one year; at 11.9%, the unemployment rate for the region was just above the average rate nationally
- Age:** one fifth of unemployed persons were younger than 25 years of age; the unemployment rate for this age group was 26%, just above the average rate nationally
- Education:** just above one quarter of unemployed persons in the West region had had at most lower secondary education; less than one third of unemployed persons held a third level qualification
- Sector:** almost one fifth of unemployed persons had previously been employed in construction, about one-in-ten in wholesale and retail, and one-in-twelve in industry
- Occupation:** most of unemployed persons had previously been employed in skilled trades, elementary and operative occupations.

Figure 9.8 Unemployment by age (West), Q4 2013



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

Figure 9.9 Unemployment by education (West), Q4 2013



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

Figure 9.10a PES job seekers (West), May 2014

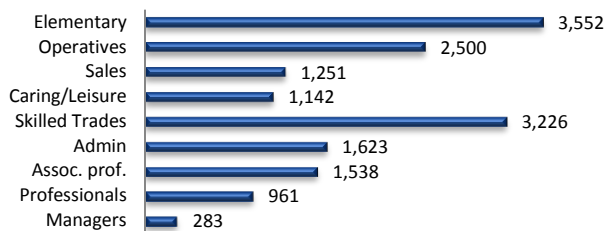
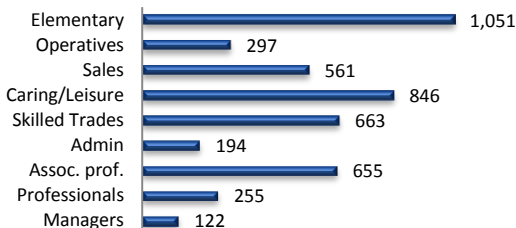


Figure 9.10b PES vacancies (West), Jan-Dec 2013



Source: Analysis by SOLAS (SLMRU) based on DSP data

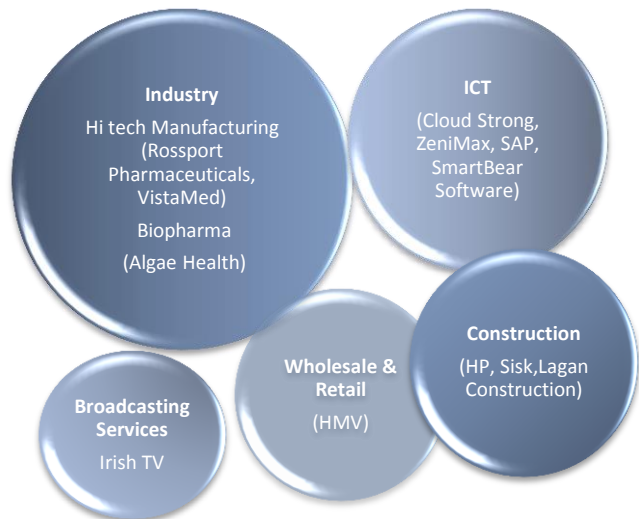
Live register, PES job seekers and vacancies

- In April 2014, there were 35,200 persons on the Live Register in the West region (an 8% decline compared to April 2013); of these, 14% were younger than 25 and 60% were male
- In May 2014, over 16,000 job seekers were registered with the PES in the region; at 22%, the highest share of job seekers had previously worked in elementary occupations (process plant, construction, catering/hospitality); 20% worked in skilled trades (carpenters, bricklayers, painters), and 16% worked as operatives (process operatives, HGV/van drivers); finally, a sizeable number worked as sales/retail assistants
- In 2013, 4,644 vacancies were advertised through DSP Jobs Ireland for the West region; at just over 1,000, the highest number of vacancies was for elementary occupations (kitchen and catering assistants, cleaners and domestics), followed by over 800 vacancies for personal services occupations (home carers) and over 600 each for associate professionals and skilled trades.

Employment growth and job creation

- Over the period quarter 4 2012 to quarter 4 2013, employment expanded by 3%, at the same rate as nationally; while there were an additional 5,000 persons at work, the change in employment varied by sector
- The largest growth, in absolute terms, was recorded in agriculture (adding just over 6,000 persons), and professional services (adding just over 3,000 persons); employment increased in food and accommodation services and in industry; in contrast, employment in both the ICT and public sector contracted (each of the sub-sectors of the public sector registered a decline)
- Recent job announcements suggest that over the short to medium term job opportunities will arise in the high tech manufacturing and ICT sectors - with opportunities for roles in sales and marketing, customer/user support, and finance and software development; in addition, jobs opportunities are expected to arise in construction due to the forthcoming/on-going expansion of HP and Jazz Pharmaceuticals facilities.

Figure 9.11 Job creation announcements (West) 2013 & 2014



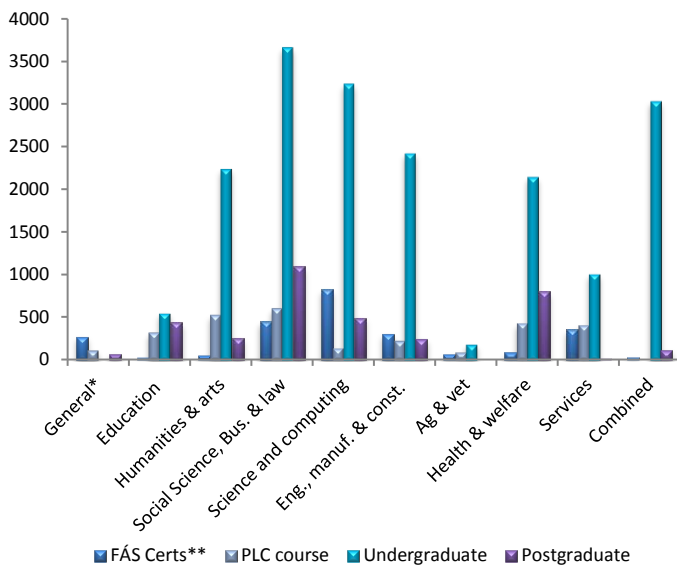
Source: Analysis by SOLAS (SLMRU) based on various sources

Education and training enrolments

In 2013, there were almost 27,300 learners and/or certificates in selected further and higher education and training in the region; there were:

- over 2,400 FÁS certificates: over a third were in science and computing, almost a further fifth were in social science, business and law, while one-in-seven were in services
- 2,900 PLC enrolments: social science, business and law had the highest number of enrolments (amounting to one fifth of the total), followed by humanities and arts, accounting for 18%, and health and welfare (accounting for 15% of the total)
- 18,500 undergraduate enrolments: of these, one fifth were for courses in social science, business and law; 18% were in science and computing, and 12% in health and welfare
- almost 3,500 postgraduate enrolments: of these, social science, business and law made up about a third, while health and welfare made up almost a quarter.

Figure 9.12 FÁS Certs, PLC courses & higher education enrolments (West), 2013



Source: DES, HEA

* Includes general programmes and broad/combined fields of learning
 ** FÁS certs refer to the 2013 calendar year and are a subset of all certs issued; higher education and PLC enrolments refer to the 2012/2013 academic year

Early school leavers from education and training: in quarter 4 2013, the ESL rate was 8% - matching the average rate for the State.

Census (2011) data by county

Table 9.1 Persons at work and unemployed in the West region by county, Census 2011

	Galway	Mayo	Roscommon	Total West
At work	58%	28%	14%	100%
Unemployed	56%	29%	15%	100%

Source: CSO Census 2011

Table 9.1 shows the share of persons at work in the West region by county in 2011. Galway accounted for the largest share of employment in the West region at 58%, Mayo accounted for 28%, while Roscommon accounted for the smallest share, at 14%.

Key points from the Census 2011 data include:

- Occupation:** Galway had an above average share of persons employed in high skilled occupations (managers, professionals and associate professionals) at 40%, while Mayo and Roscommon had below average shares of 33% and 34% respectively. When compared to Galway, Mayo and Roscommon each had higher shares of persons at work in skilled trades.
- Sector:** While all counties had a higher than average share of persons at work in agriculture, this was particularly the case for Mayo and Roscommon. Both Mayo and Roscommon had lower shares of persons at work in financial and professional activities. In Roscommon 10% of persons at work were employed in PAD (compared to 6% nationally).
- Education:** 22% of those at work in both Mayo and Roscommon had attained lower secondary education compared to 16% in Galway; Galway had a much higher share of persons at work with third level qualifications than the other two counties and nationally.
- Age:** For those at work, Mayo and Roscommon each had an older age profile than that of either Galway or the national average.
- Unemployment:** Unemployment for those previously employed in the construction sector was higher than average for Mayo and Roscommon. All counties had a higher share of persons unemployed from skilled trade occupations than the national average.

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

Ms. Una Halligan	Chairperson
Ms. Marie Bourke	Head of Secretariat and Department Manager, Forfás
Ms. Inez Bailey	Director, National Adult Literacy Agency
Mr. Peter Baldwin	Assistant Secretary, Department of Education and Skills
Mr. Ray Bowe	IDA Ireland
Ms. Liz Carroll	Training and Development Manager, ISME
Mr. Ned Costello	Chief Executive, Irish Universities Association
Ms. Margaret Cox	Managing Director, I.C.E. Group
Mr. Bill Doherty	Executive Vice President, EMEA, Cook Medical
Mr. Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Dr. Bryan Fields	Director, Curriculum Development/Programme Innovation, SOLAS
Ms. Sonia Flynn	EMEA Director for User Operations, Facebook
Mr. Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Ms. Deirdre McDonnell	Principal Officer, Department of Education and Skills
Mr. Jerry Moloney	Director of Skills, Enterprise Ireland
Mr. Frank Mulvihill	Former President of the Institute of Guidance Counsellors
Dr. Brendan Murphy	President, Cork Institute of Technology
Mr. John Bourke	Principal Officer, Department of Public Expenditure and Reform
Mr. Alan Nuzum	CEO, Skillnets
Dr. Peter Rigney	Industrial Officer, ICTU
Mr. Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Ms. Mary-Liz Trant	Higher Education Authority

Appendix 2: Recent Expert Group on Future Skills Needs Publications

Report	Publication Date
National Skills Bulletin 2014	July 2014
Vacancy Overview 2013	May 2014
Assessing the Demand for Big Data and Analytics Skills, 2013 - 2020	May 2014
The Expert Group on Future Skills Needs Statement of Activity 2013	March 2014
Regional Labour Markets Bulletin 2013	March 2014
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2014	February 2014
Addressing Future Demand for High Level ICT Skills	November 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2013	July 2013
National Skills Bulletin 2013	July 2013
Future Skills Requirements of the Manufacturing Sector to 2020	April 2013
The Expert Group on Future Skills Needs Statement of Activity 2012	April 2013
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2013	February 2013
Vacancy Overview 2012	February 2013
Regional Labour Markets Bulletin 2012	January 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs	July 2012
National Skills Bulletin 2012	July 2012
Key Skills for Enterprise to Trade Internationally	June 2012
EGFSN Statement of Activity 2011	April 2012
Vacancy Overview 2011	February 2012
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise (<i>Forfás report based on EGFSN identified future skills needs</i>)	February 2012
Addressing High-Level ICT Skills Recruitment Needs: Research Findings	January 2012
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs	July 2011
National Skills Bulletin 2011	July 2011
Developing Recognition of Prior Learning: The Role of RPL In the Context of the National Skills Strategy Upskilling Objectives	April 2011

Vacancy Overview 2010	March 2011
Future Skills Needs of Enterprise within the Green Economy in Ireland	November 2010
Future Skills Requirements of the Biopharma-Pharmachem Sector	November 2010
Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2010	July 2010
National Skills Bulletin 2010	July 2010
Future Skills Needs of the Wholesale and Retail Sector	May 2010

Appendix 3: Glossary

The following abbreviations are used throughout the report:

CSO	Central Statistics Office
DJEI	Department of Jobs, Enterprise and Innovation
DSP	Department of Social Protection
E	Employment
E rate	Employment rate
ESL	Early School Leavers
ESRI	Economic and Social Research Institute
ETB	Education and Training Board
ICT	Information and Communication (broad economic sector, NACE Rev 2)
ILO	International Labour Organization
LF	Labour Force
LR	Live Register
NACE	Nomenclature statistique des activités économiques dans la Communauté européenne
P rate	Participation rate (i.e. labour force participation rate)
PAD	Public Administration and Defence
PES	Public Employment Service
PLC	Post Leaving Certificate
QNHS	Quarterly National Household Survey
SOC 2010	Standard Occupational Classification 2010
UE	Unemployment

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