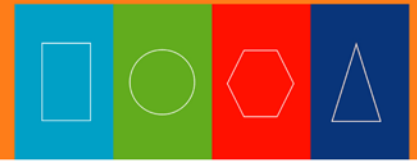


Vacancy Overview 2015

May 2016



Vacancy Overview 2015

A report produced by the Skills and Labour Market Research Unit (SLMRU) in SOLAS for the Expert Group on Future Skills Needs

May 2016

Authors

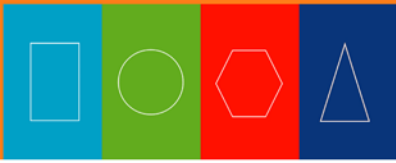
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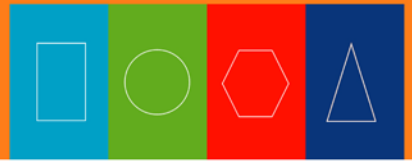
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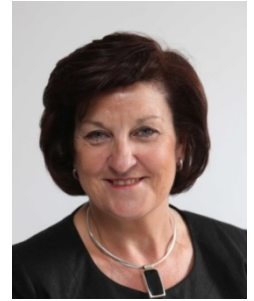
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Foreword

The Vacancy Overview 2015 report, the sixth in the series, is produced by the Skills and Labour Market Research Unit (SLMRU) in SOLAS on behalf of the Expert Group on Future Skills Needs. While previous overviews examined the vacancies that were occurring by occupational group, this edition collates the data and reports the findings by sector. The introduction of a number of additional key labour market indicators has allowed an analysis which contextualises the vacancy data with what is occurring in the Irish labour market.



This report utilises two sources of vacancy data, namely those vacancies advertised through DSP Jobs Ireland (public employment service) and IrishJobs.ie (private recruitment agency). In addition, a number of indicators, such as employment levels, transitions, CSO vacancy rates and occupations for which vacancies are proving difficult to fill were examined. This analysis allows us to determine, for each sector, where vacancies are occurring, the nature of these vacancies (whether due to expansion, replacement or churn) and an indication of the level of education and experience required or held.

The Overview shows that an increase in the number of notified vacancies occurred in a number of sectors, such as construction and industry, coinciding with evidence of significant employment growth. A high level of job churn was identified in a number of sectors, such as wholesale/retail and accommodation/food services, where large numbers of vacancies were occurring without any corresponding signs of growth.

When compared with previous years, the construction sector has experienced a noticeable increase in vacancy notifications, particularly for skilled tradespersons such as electricians and carpenters. A significant number of notifications have continued to occur for high skilled positions in the IT sector, and in professional and financial activities sectors. A high volume of notifications persisted for lower skilled areas such as for sales assistants and care worker, related to a high level of churn. A demand for language skills remains, particularly in contact centres and in technical support, with German the most frequently mentioned language.

The Overview shows that the profile of vacancies, and the reasons they occur, vary depending on the sector. This variation in the nature of vacancy notifications should be borne in mind in the formulation of any policy recommendations in relation to education and training and labour market interventions that stem from this analysis.

Una Halligan
Chairperson, Expert Group on Future Skills Needs

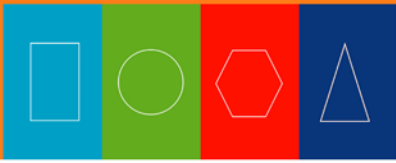
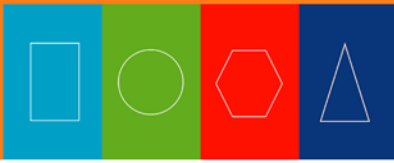




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Key findings by sector

Below is a summary of the key findings for each of the sectors examined in this report. The data sources utilised in this report are described in Section 2 while the data utilised for these conclusions is synthesised in Table 3.1 (Pages 24-25).

Industry: despite low vacancy rates reported in the CSO figures, this is a large sector which means that even with low replacement rates, large volumes of job openings are likely to occur; indeed, growth has been observed in the most recent period and there is evidence of both a high level of recent job hires and difficulty in sourcing relevant persons across a variety of occupational groups; the transitions data also points to a high volume of churn in the sector most likely related to job openings for lower skilled occupations (such as operatives) where significant experience is not required.

Wholesale and retail trade: the transitions and recent job hire data suggest significant job openings in this sector even though this sector experienced a fall in employment and has a low vacancy rate; there is little indication of difficulty in sourcing candidates with the retention of staff presenting a greater issue for this sector.

Construction: this is a sector that is showing considerable signs of growth, particularly in the area of skilled trades; all indicators, including the vacancy rate, recent job hires, and volume of vacancy notifications show upward trends for this sector; the transitions data indicates that a large share of persons entering this sector were previously unemployed.

Accommodation and food services: despite relatively static employment numbers, this sector has experienced considerable churn, primarily for elementary occupations, taken up mainly by young cohorts with less than third level education; vacancies for chefs have been occurring frequently, although the high share of vacancy notifications through recruitment agencies rather than directly by employers leads to a difficulty in ascertaining the number of actual posts on offer.

Information and communications: the overall employment growth in this sector in recent years has been steady with some of the main indicators examined here (recent job hires, difficult to fill vacancies, IrishJobs.ie etc.) pointing to a vibrant jobs market, with demand particularly for young, high skilled persons. While expansion is evident, a share of the job openings occurring is due to churn, with transitions data showing significant movement within the sector. The Recruitment Agency Survey and employment permit data indicate that significant shortages of persons with specific IT skills are presenting issues for the sector.

Financial, insurance and real estate: the high vacancy rates for this sector are in contrast with the fall in employment levels; the transitions data, which shows a high level of movement



within the sector, suggests that while opportunities may exist in this sector at the associate professional/administrative level, a high level of churn may be a contributing factor to this. The appearance of this sector in employment permit and difficult to fill vacancies indicate that employers are still having issues with finding suitably qualified staff in some areas.

Health and social work: although this sector is not experiencing significant growth (due primarily to budgetary restrictions), replacement demand alone is contributing to a high level of job openings; employment permit data indicates difficulties sourcing sufficient skilled staff particularly in relation to doctors and nurses, while other indicators point to issues with retention, particularly regarding care workers.

Professional, scientific and technical activities: many of the indicators point to a sector experiencing growth with opportunities in high skilled roles; the transitions data, however, indicates that a share of the job openings relates to churn rather than expansion; difficulty in sourcing suitably qualified persons for this sector has been identified in a small number of niche areas.

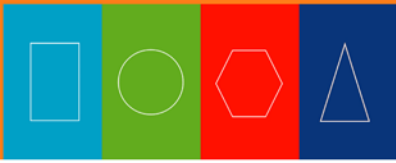
Administrative and support services: the main area of demand in this sector relates to contact centre roles with language skills; the low employment growth in this sector would indicate that churn is a larger factor than expansion; there is also evidence of cleaning and security guard roles appearing frequently in the vacancy data, although this is thought to be primarily related to a high level of turnover for these positions.

Transportation and storage: this is a sector which is not registering significant activity, either growth or turnover, although difficulty in sourcing HGV drivers and mechanics was identified.

Public administration and defence: a limited amount of opportunities as this sector is particularly influenced by government policy and budgetary restrictions.

Education: this sector has been experiencing slow growth, with most opportunities occurring due to replacement demand.

Arts, entertainment & other service: relatively few vacancies have been notified for positions within this sector, with most opportunities occurring for personal services occupations.



1. Introduction

Aim of the report

This report is produced annually by the Skills and Labour Market Research Unit (SLMRU) in SOLAS on behalf of the Expert Group on Future Skills Needs (EGFSN) in order to provide an overview of the demand for labour through identifying trends associated with advertised job vacancies.

In order to ascertain the nature of the vacancies occurring, i.e. if they are arising due to expansion demand, job churn or due to difficulty sourcing suitably qualified/experienced personnel, a number of other relevant data sources are also examined.

What data is examined?

- Vacancy data: newly advertised vacancies through DSP Jobs Ireland (Public Employment Services) and IrishJobs.ie (a private recruitment agency)
- CSO Quarterly National Household Survey (QNHS): employment trends, transitions and recent job hires
- CSO Job Vacancy data: collected from the Earnings, Hours and Employment Costs Survey (EHECS) of employers, providing vacancy numbers and rates across sectors since 2008
- The Recruitment Agency Survey, conducted by the SLMRU in October 2015, which seeks to identify difficult to fill vacancies
- Employment permit data, provided by the Department of Jobs, Enterprise and Innovation (DJEI), which indicates where employers were unable to find suitable candidates within the Irish labour market and the broader European Economic Area (EEA)
- Job announcements in the media and confirmed by IDA client companies, which indicate future demand in the short to medium term.

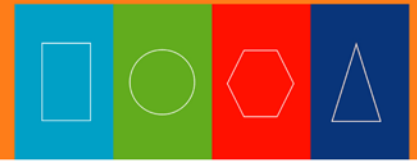
How does this report differ from previous Vacancy Overview reports?

While previous Vacancy Overview reports were structured around occupational groups, this report examines vacancy trends in terms of sectors¹. New data sources have also been introduced including the examination of those recently hired and the CSO Job Vacancy rates. These new data sources, along with further analysis of existing data sources, allow us to explore the extent to which vacancies are occurring due to expansion demand or churn.

What conclusions can be drawn from the findings?

An examination of vacancy data provides an insight into which occupations have vacancies occurring most frequently in the labour market. These findings should not be treated in isolation, but instead examined alongside other labour market data sources in order to assess if these vacancies are occurring due to expansion demand, replacement demand and/or turnover and to what extent they

¹ Due to the increasing prevalence of cross-sectoral skills, e.g. technology positions in the financial sector, detailed occupational breakdowns of vacancies will be linked to the sector where the occupation occurs most frequently.

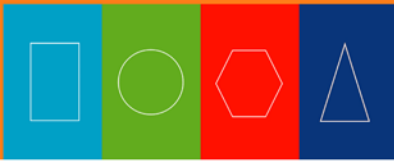


indicate shortages of labour and skills. In some cases, there are sufficient skilled persons available in the labour market to meet any open vacancies; on the other hand, the Recruitment Agency Survey and the employment permit data give us clear indications of where vacancies may be proving difficult to fill due to a lack of suitable candidates. Table 3.1 provides a breakdown of all of the indicators by sector. Finally the examination of job announcements in the media, and through the IDA, signpost where future opportunities are likely to occur.

This analysis of vacancy trends can provide significant insights for stakeholders in areas where education and training should be focused, where sourcing from abroad through work permits is required, or where an examination of working conditions should be monitored.

What is the structure of the report?

- Section 2 details the data sources utilised, along with the limitations of these sources
- Section 3 provides an overview of the main findings by data source and sector
- Table 3.1 provides a breakdown of all the indicators utilised in the report by sector
- Sections 4 to 16 provide vacancy trends by sector; the analysis of vacancies is set in the context of the other data sources in order to establish the nature of the vacancy.



2. Data Sources

2.1 Estimates of demand

CSO QNHS

The SLMRU analyses the CSO's Quarterly National Household Survey (QNHS) to examine movement in the labour market, and for the purposes of this report examines three key areas:

- **Employment growth**

An examination of changes in employment levels by NACE sector (as detailed in Appendix A) gives an indication of the level of expansion that is occurring. For some sectors, large numbers of vacancies are occurring without any corresponding growth in the sector, suggesting that movement relates primarily to turnover rather than expansion.

- **Labour market transitions**

Labour market transitions refer to the change in the labour market status of individuals between two points in time. An analysis of the transitions that occurred in the previous year by sector shows that even without employment growth many job openings may be occurring due to replacement demand and/or churn. Each sector varies in this respect with the findings detailed throughout the report. The latest available data for transitions is 2014.

- **Recent job hires**

By examining the QNHS data for those recently hired² (within the previous three months) we can ascertain the sectors where most recent recruitment has been occurring; we can also establish some of the characteristics of the persons most recently employed (e.g. age, education attainment), as well as the occupations where these job openings are occurring. This data, however, does not ascertain the cause of these openings, whether it is expansion or replacement.

CSO EHECS

The CSO have recently begun publishing both vacancy numbers and rates, collected from the quarterly Earnings, Hours and Employment Costs Survey (EHECS). This information provides a robust time series of where vacancies are occurring at a sectoral level. EU comparisons are also available through the EU's statistics office, Eurostat. However, it should be borne in mind that this analysis only represents one point in time for each quarter. The EHECS examines all companies with 50 or more employees along with a sample of enterprises with 3-49 employees as detailed in Appendix B.

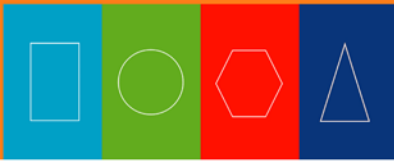
² Recent job hirings refer to employees who were employed in a 'reference week' and had started working for their employer at most three months earlier.



2.2 Vacancy data

This report analyses vacancy notifications from two sources, namely the DSP Jobs Ireland portal (public employment service) and IrishJobs.ie (private recruitment agency). While both vacancies sources provide vital information on the type of vacancies arising in the labour market, they are not directly comparable for a number of reasons, as detailed below.

	IrishJobs.ie	DSP Jobs Ireland
Scope	Most vacancies relate to professional and associate professional positions	Most vacancies are for skilled trades, personal services, operatives and elementary occupations
Employer/Agency	Includes vacancies advertised by employers only	Includes vacancies by both employers and recruitment agencies
Posts	Only reports on vacancies without detailing the number of posts involved for each vacancy	Reports the number of posts for each vacancy advertised
Administration of vacancy websites	Employers administer the vacancies advertised directly and as such can refresh a previously advertised vacancy to occur as a new vacancy in the same or following month, which may lead to an overestimation of the true number of new vacancies	The DSP administer the portal and are responsible for when vacancies are advertised and for how long; each vacancy only occurs once
Occupations	Occupations coded to SOC2010 by SLMRU using CASCOT software based on the job title given	The data is pre-coded with MANCO occupational coding by DSP staff, which is then matched to SOC2010 codes by SLMRU
NACE sector	Data already assigned a sectoral classification which is linked by SLMRU to a NACE sectoral classification; therefore, it is possible for one occupation to appear in a number of NACE sectors	As the data did not include a sectoral classification, each SOC2010 code was linked by SLMRU to a NACE sectoral code based on the sector where that occupation is most often associated with; therefore, each occupation only appeared in one sector analysis
Level of experience	Available for 56% of the vacancies in 2015 and broken down by the number of years of experience required	Information on experience available for 99% of the vacancies, but grouped into three categories: no experience, some experience and fully experienced
Level of education	Available for 55% of the vacancies in 2015 with a detailed breakdown of the education level required	Not provided



General vacancy data limitations

- Vacancies may be advertised through channels not captured in the analysis (e.g. social media, recruitment agencies, employer websites), leading to an underestimation of the true demand; this may be particularly true in the case of certain foreign languages (e.g. Mandarin) where employers may prefer to advertise the vacancy in the language being sought or in countries where fluency in that language is commonplace
- Vacancies may be advertised simultaneously through several channels, leading to multiple counting and an overestimation of the true demand
- The extent to which vacancies are arising due to expansion demand (the creation of a new position by an employer), replacement (a person leaving an already existing position), turnover (the rate at which an employer gains and loses employees), or other reasons cannot be inferred from the available data
- While it was possible to identify and exclude Work Placement and JobBridge vacancies from the DSP Jobs Ireland data, it was not possible to do so from the IrishJobs.ie vacancy data; however, as the Work Placement and JobBridge schemes are administered and advertised through DSP Jobs Ireland, their occurrence in other data sets is likely to be low and therefore unlikely to skew the data unduly.

Given the above data limitations, the analysis focuses on the **qualitative** aspects of newly advertised vacancies. The objective is **not to quantify** the number of vacancies but rather to examine the types of jobs and skills most frequently appearing in the data sources captured. When vacancy trends are presented, they are included merely as an indication of movement in the vacancies from the two sources rather than the overall vacancy market.

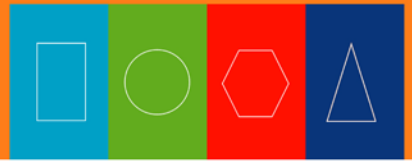
2.3 Recruitment Agency Survey

The Skills and Labour Market Research Unit (SLMRU) in SOLAS has conducted a recruitment agency survey every six months since January 2008. It is designed to gather the views of recruitment agencies in respect of the occupations for which vacancies, in their experience, are proving difficult to fill. Almost 120 recruitment agencies were contacted and asked to participate in a telephone interview. The findings of the most recent survey³, which took place in October 2015, are presented for each sector with a detailed analysis available in Appendix C.

2.4 Job Announcements

Announcements in the media (national newspapers) indicating the creation or loss of jobs have been documented by the SLMRU since 2010. Job announcements over the period January to December 2015 are summarised and presented for each sector, thereby highlighting areas in which job opportunities are arising as well as those where expansion activities may occur in the short-medium

³ Only those recruitment agencies who reported having difficult to fill vacancies (36 of the respondents) are included in the analysis in this report.

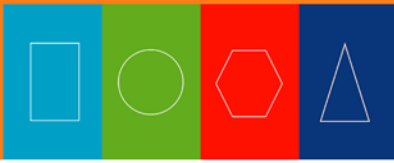


term. Job creation expected to arise from foreign direct investment (FDI) in Ireland, supported by the IDA, is also included.

2.5 Employment permits

Employers, where necessary, employ workers from non-EEA countries through employment permit schemes. While the data on newly issued employment permits, provided by the DJEI, may be used to highlight occupations for which employers experience difficulty in sourcing staff domestically, it should be interpreted with caution:

- new employment permits may be issued to persons already residing in Ireland but who have changed employer
- new employment permits may be issued to spouses/dependants of existing employment permit holders although the incidences of this occurring have declined in recent years.

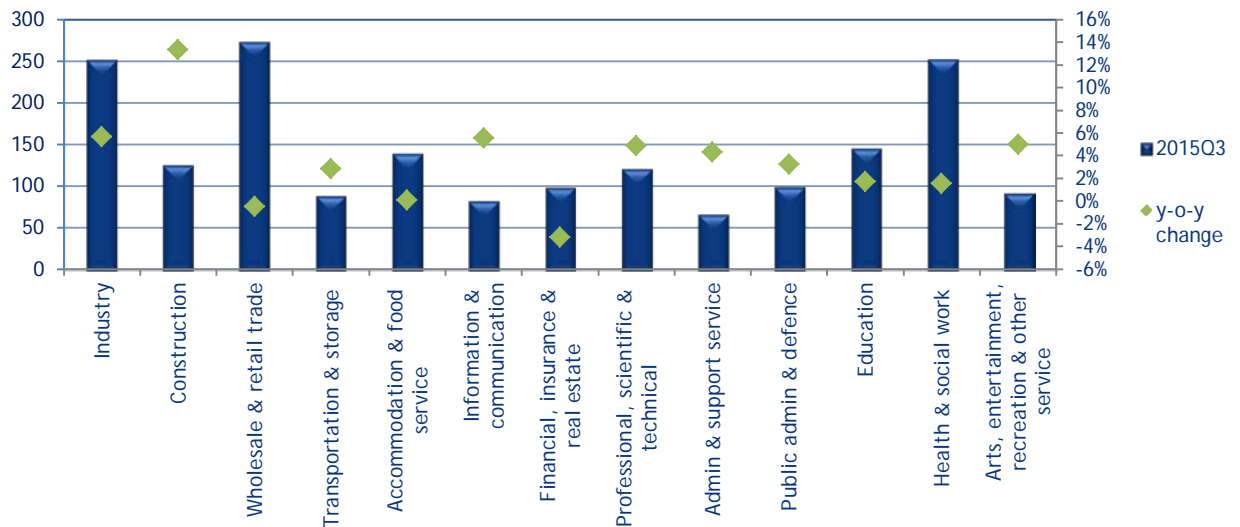


3. Main findings

Employment levels (Figure 3.1)

- The wholesale and retail sector along with industry and the health sector account for the highest numbers employed in quarter 3 2015
- In terms of employment growth, the construction sector experienced the largest relative annual growth, at 13%, between quarter 3 2014 and quarter 3 2015
- In the same time period, employment levels fell marginally for two sectors, namely wholesale and retail and the financial sector with a 1% and 3% decline respectively.

Figure 3.1: Employment by sector (000s) in quarter 3 2015 and employment change (%), quarter 3 2014 - quarter 3 2015



Source: CSO

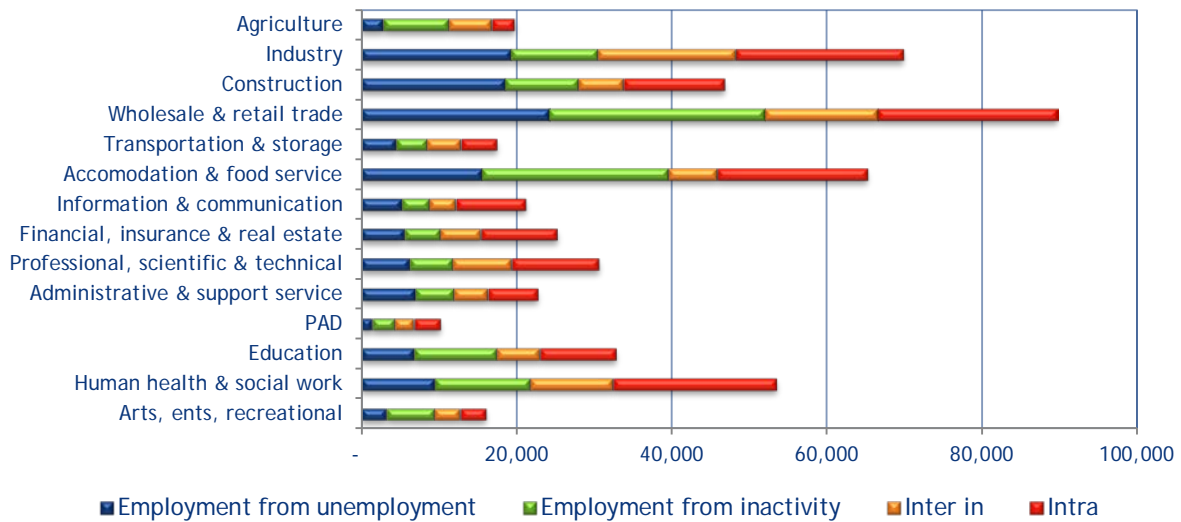
Transitions (Figure 3.2)

Most of the transitions in the labour market in 2014 occurred for the wholesale and retail sector followed by industry and the accommodation and food service sectors.

- **Employment from unemployment:** occurred primarily in industry, construction and the wholesale & retail sectors
- **Employment from inactivity:** mainly occurred in the wholesale and accommodation sectors
- **Transitions within employment but from a different sector (Inter):** the number of transitions in this group occurred less frequently and were mainly in industry and wholesale/retail
- **Transitions within employment but from the same sector (Intra):** large volume of movement, particularly in industry, wholesale/retail, accommodation and health.



Figure 3.2: Transitions by sector, 2014



Source: SLMRU analysis of CSO QNHS data

Recent job hires

The number of persons recently hired (within three months of being surveyed) tends to fluctuate depending on the quarter reported. As shown in Figure 3.3, however, the number of recent hires reported has been growing in each quarter since 2013. For the purposes of this report, the four quarters, from quarter 4 2014 to quarter 3 2015, have been summed to provide an annual summary: henceforth these will be referred to as the 2015 recent job hires.

In 2015, (Figure 3.4 and Figure 3.5):

- in line with transitions data, the wholesale/retail sector, accommodation/food services and industry recorded the highest number of recent hires
- most hires were for those with third level (42%) or higher secondary/FET (41%) education
- a third of recent hires were for those aged 25-34 years, with a further 32% aged 15-24 years
- the hires were spread across all occupational groups although the largest share were for those in elementary occupations (at 18%)
- full-time positions accounted for three fifths of recent job hires.



Figure 3.3: Recent hires by quarter, 2013-2015

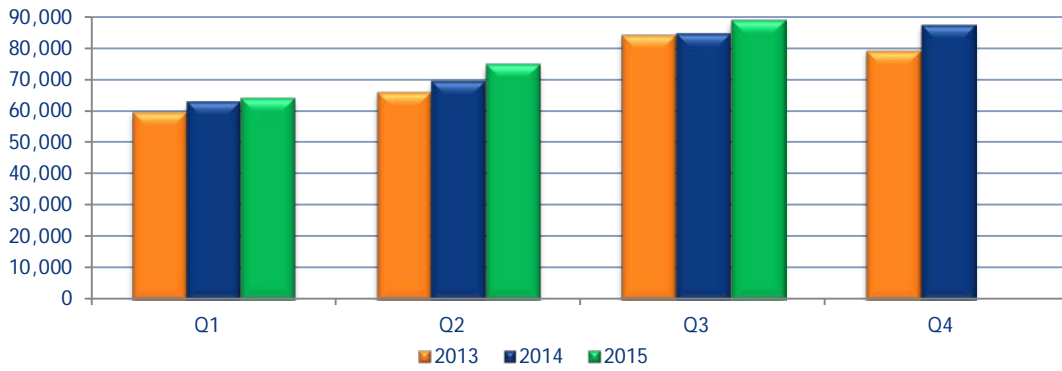


Figure 3.4: Recent hires by sector, 2015

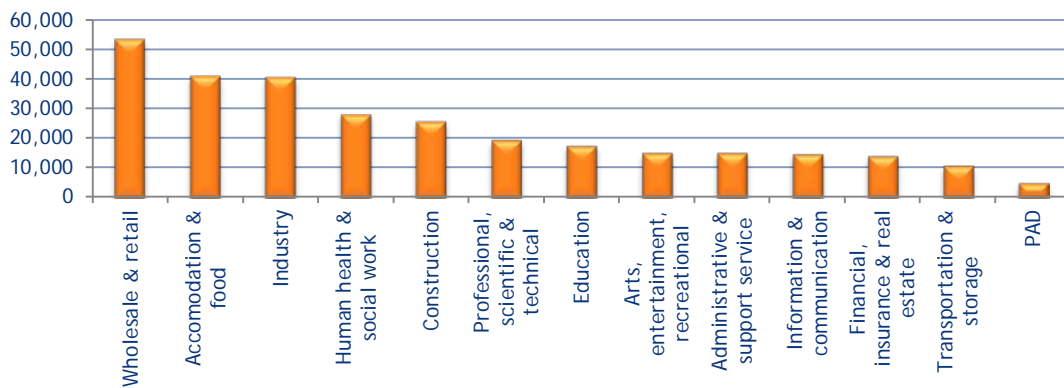
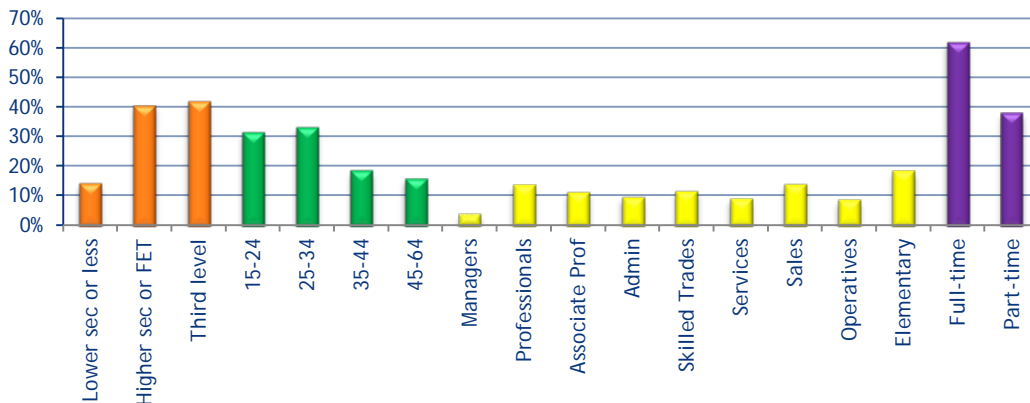


Figure 3.5: Recent hires by education, age, occupation and employment type, 2015



Source: SLMRU analysis of CSO QNHS data

CSO reported vacancies

The number of vacancies reported through the Earnings, Hours and Employment Costs Survey (EHECS) fell from a peak of 18,000 in 2008 to just over 5,000 at the end of 2009 (Figure 3.6). The numbers have since increased steadily, reaching 16,500 in the third quarter of 2015.

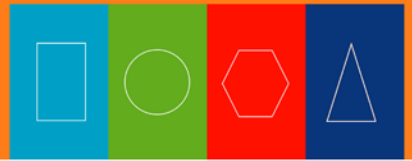
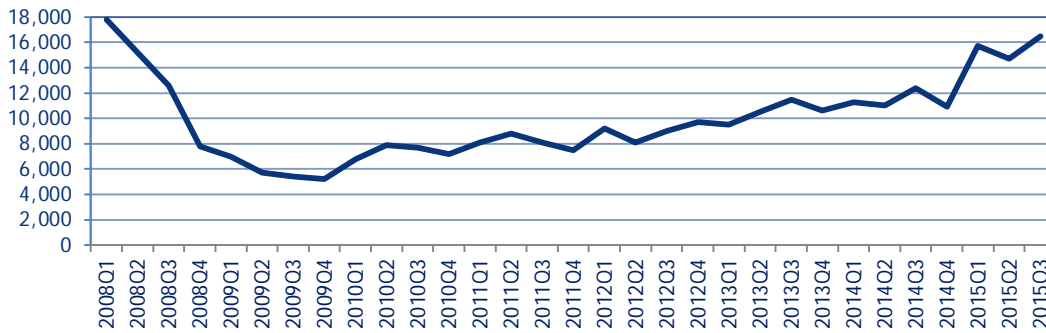


Figure 3.6: CSO vacancy numbers, quarter 1 2008 - quarter 3 2015

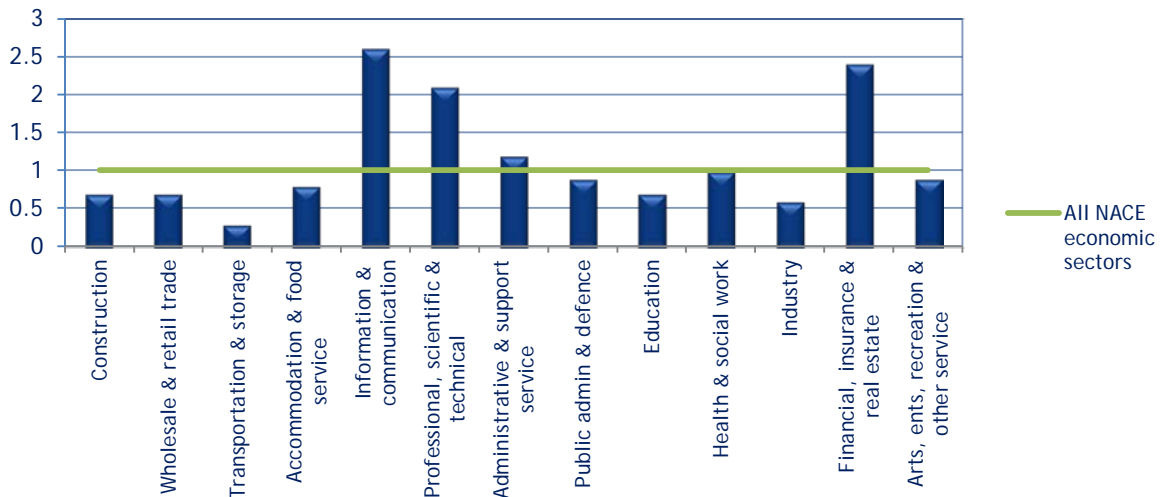


Source: CSO EHECS

Vacancy rates by sector

The job vacancy rate, as detailed in the EHECS, measures the proportion of total posts that are vacant as a proportion of total occupied posts combined with job vacancies⁴. In terms of sectors, in the third quarter of 2015, four sectors had a higher vacancy rate than the overall average of 1%, namely, information and communications, professional activities, administrative services and the financial sector (Figure 3.7).

Figure 3.7: CSO vacancy rate by sector, quarter 3 2015



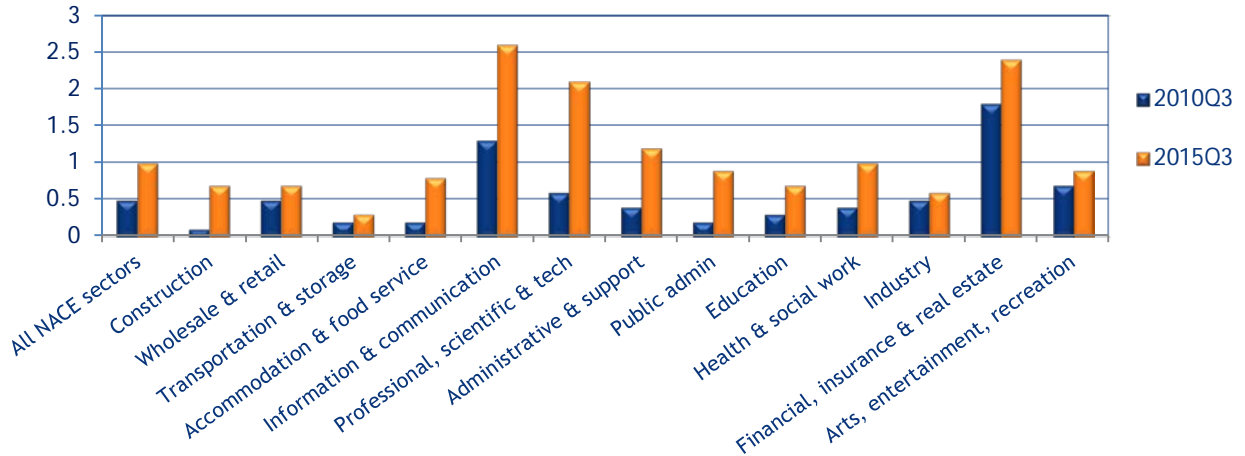
Source: CSO EHECS

Between quarter 3 2010 and quarter 3 2015, the vacancy rates increased across all sectors (Figure 3.8). The largest growth in vacancy rates occurred for the IT and professional activities sectors.

⁴ Job Vacancy Rate = (Number of job vacancies/Number of occupied jobs + Number of job vacancies) * 100



Figure 3.8: CSO vacancy rate by sector, quarter 3 2010 and quarter 3 2015

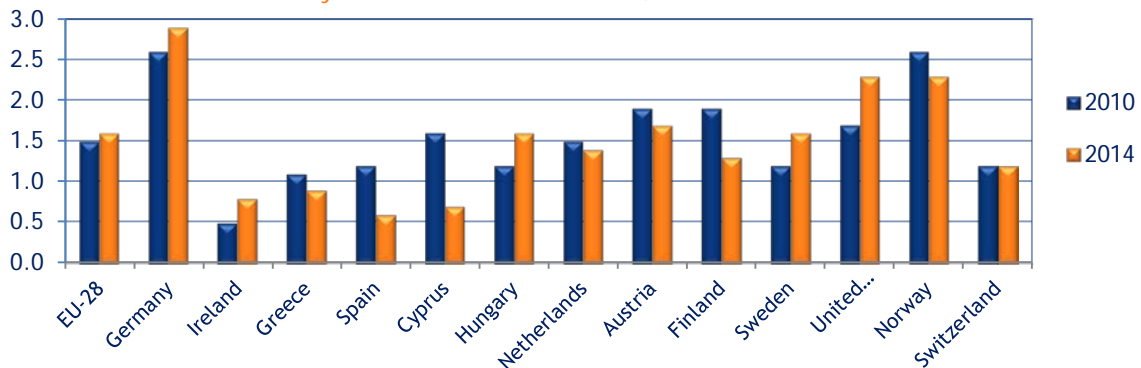


Source: CSO EHECS

EU vacancy rates

An EU comparison of vacancy rates is also available through the EU's statistics office, Eurostat (Figure 3.9). In 2014, the Irish vacancy rate, as measured by EHECS, stood at 0.8%. While this rate is below the EU-28 rate of 1.6%, this may be a reflection on the varied methods of data collection across the EU. While Ireland's vacancy rate increased since 2010, it fell for many EU countries including Greece, Spain and Cyprus.

Figure 3.9: Annualised vacancy rates across EU countries, 2010 and 2014



Source: Eurostat

Vacancy data

IrishJobs.ie

The number of vacancies notified through IrishJobs.ie has been increasing steadily since 2013, with a 25% increase in the year since 2014. Figure 3.10 shows that:

- the professional, scientific and technical activities sector accounts for by far the largest share of vacancies notified to IrishJobs.ie and has shown high levels of growth in recent years
- the information and communications and financial activities sectors accounted for 15% and 12% of the overall share of notified vacancies in 2015 respectively with some gains since 2013.



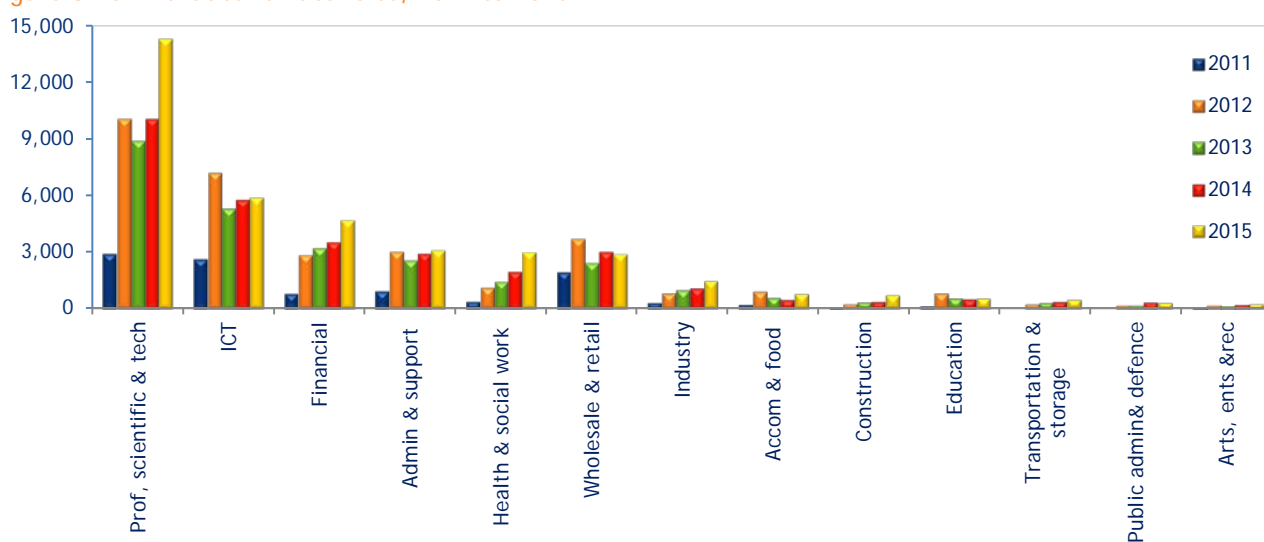
DSP Jobs Ireland

The overall number of vacancies notified through DSP Jobs Ireland has been increasing since 2012.

Figure 3.11 shows that:

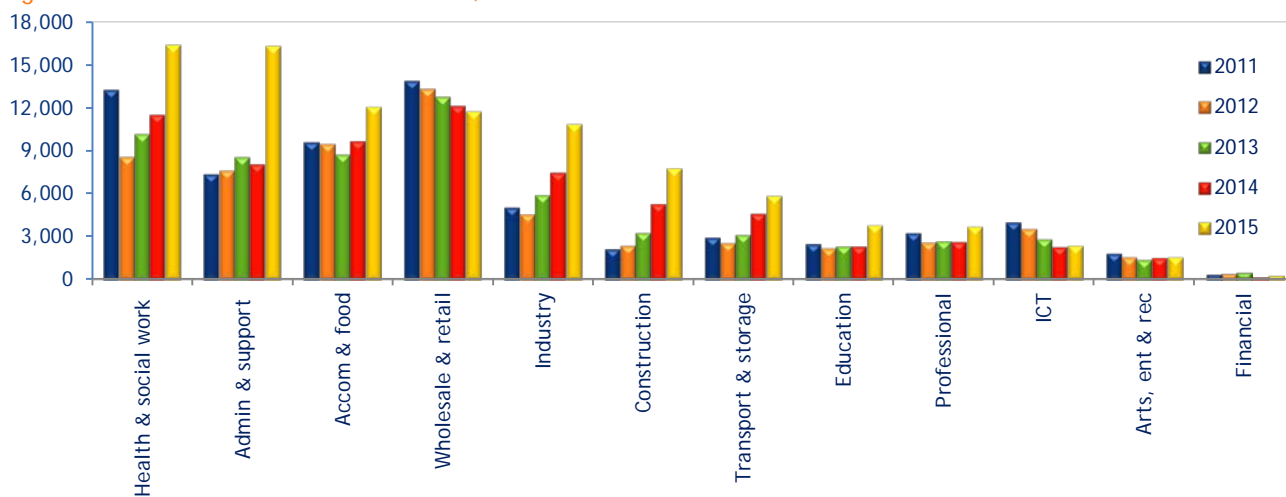
- the largest numbers of vacancy notifications in 2015 were for health and social work and admin services; the spike in notifications in admin services relates to the notification of positions for the 2016 census enumerators, whereas the increase in vacancies in health relates to nurses and care workers
- there was also notable growth in other sectors such as industry (relating mainly to a growth in notifications for process operatives), construction (increases in notifications for electricians, carpenters, drivers and elementary construction roles).

Figure 3.10: IrishJobs.ie vacancies, 2011 to 2015

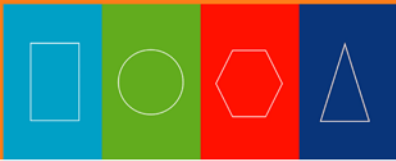


Source: IrishJobs.ie

Figure 3.11: DSP Jobs Ireland vacancies, 2011 to 2015



Source: DSP Jobs Ireland



Vacancies with language requirements

Figure 3.12 and Figure 3.13 represent all the vacancies collated from both vacancy sources where specific language requirements were detailed. These vacancies represented 2% of all DSP Jobs Ireland notifications in 2015 and 4% for IrishJobs.ie in the same period. For IrishJobs.ie most vacancies with languages occurred in the administrative and support service sector (mainly call centre activities) whilst for DSP Jobs Ireland these vacancies related primarily to the information and communications sector (e.g. tech support). German was the most frequently mentioned language requirement for both data sources followed by French, Italian, Spanish and Dutch.

Figure 3.12: Language skills requirements in vacancies by selected sector, 2015

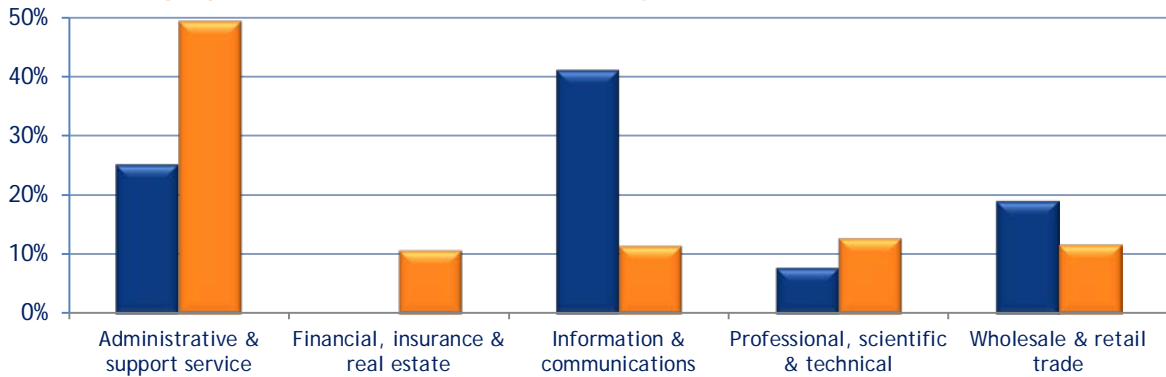
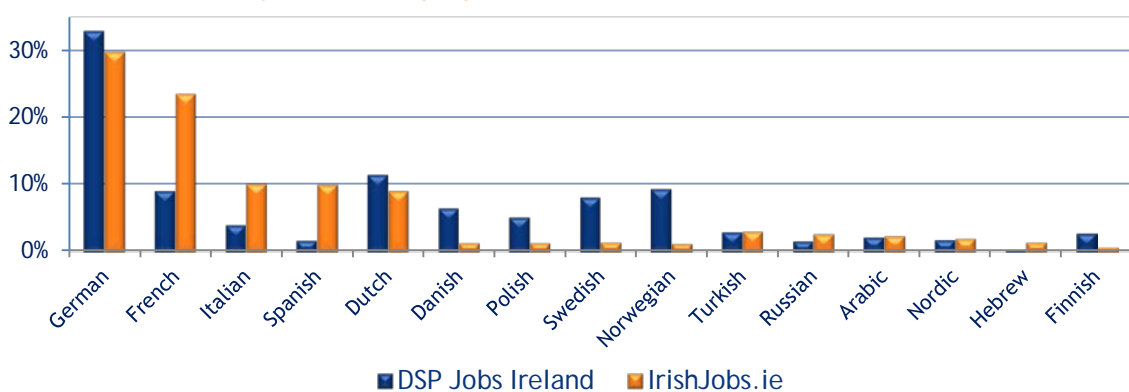


Figure 3.13: Vacancies by specific language skills requirements, 2015



Source: DSP Jobs Ireland/IrishJobs.ie

Level of experience and education required

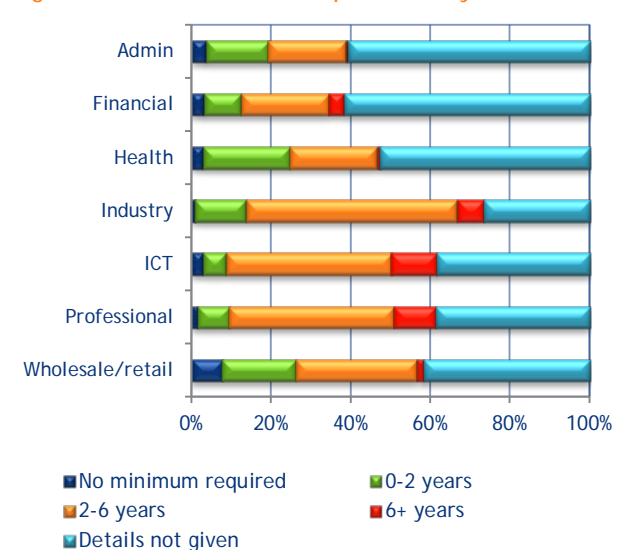
As detailed in the Data Sources section, the level of experience and education provided in the vacancy data differs for each source. Where the level of experience is detailed for IrishJobs.ie vacancy notifications (approximately 56% of vacancies), the wholesale and retail sector have the highest share of vacancies which have no minimum level of experience (Figure 3.14). Over half of vacancies for industry required 2-6 years' experience while the IT and professional activities sectors had the highest share of vacancies requiring six or more years' experience.

For DSP Jobs Ireland notifications (Figure 3.15), there were high shares of vacancies which had no minimum levels of experience requirements in administrative services (e.g. census enumerators,



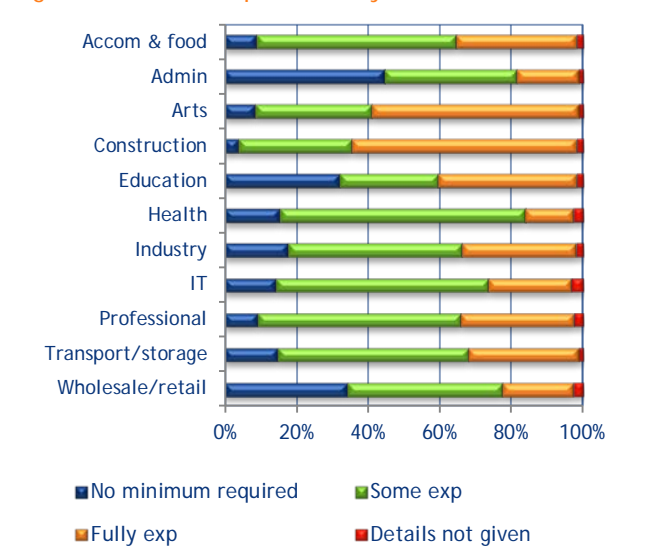
cleaners, and security guards), education (related to tutors advertised by one company) and wholesale and retail (e.g. door to door salespersons, fundraisers, sales assistants). Over half of notifications for the construction and arts/recreation sectors required fully experienced individuals (e.g. skilled trades and hairdressers).

Figure 3.14: IrishJobs.ie experience by sector, 2015



Source: IrishJobs.ie

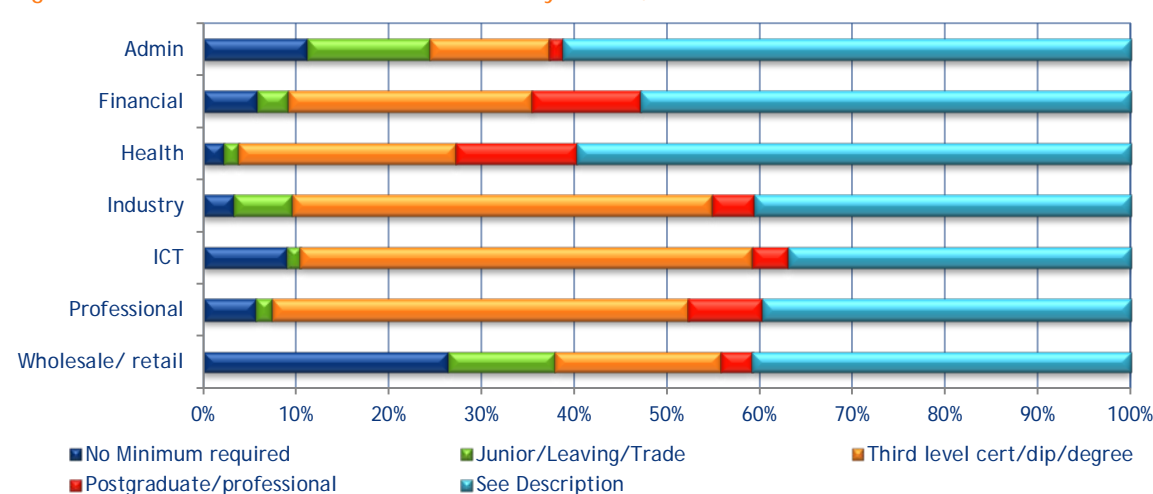
Figure 3.15: DSP experience by sector, 2015



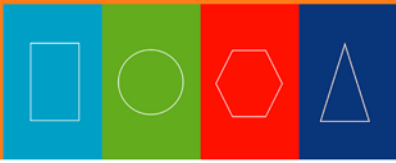
Source: DSP Jobs Ireland

The education level required was only available for the IrishJobs.ie vacancy data (Figure 3.16). The level of education required was stated in 55% of the notifications in 2015. Where level of education was stated, a third level qualification was the most frequent, accounting for at least 45% of notifications for vacancies in industry, IT and the professional activities sector. Over a quarter of vacancies notified for the wholesale and retail sector required no minimum level of education for roles such as sales representative and sales assistants.

Figure 3.16: IrishJobs.ie level of education by sector, 2015



Source: IrishJobs.ie



Recruitment Agency Survey of Difficult to Fill Vacancies (DTF)

A total of 36 recruitment agencies contacted reported having vacancies which were proving difficult to fill in October 2015. The main findings were as follows:

- when compared to the situation one year previously, the demand for DTF vacancies increased for about three-in-five of the posts mentioned; consistent with this, for approximately one half of DTF posts, there was an increase in the wages or contract rates
- recruitment agencies reported that it was extremely difficult to source suitable candidates for approximately 11% of DTF mentions
- candidates possessing cross-disciplinary skills remained in strong demand, in particular those with ICT skills applicable to business/financial services, and for those with science/engineering skills combined with supply chain, production planning, and regulatory compliance
 - in terms of occupations, professional vacancies accounted for 70% of all DTF mentions, while associate professional posts accounted for approximately 11%, sales & customer services accounted for 5%, and skilled trades for 3%
 - almost two-in-five DTF mentions were related to positions in the information and communication sector, 28% to posts in industry, while 12% were for positions in health and social care.

Job announcements

There were approximately 35,000 jobs announced in the media in 2015 for positions to be created in the Irish labour market in the short to medium term. The majority of job announcements were for roles in IT, business, industry, retail, construction and administrative services (contact centres) sectors.

Employment permits

The number of new employment permits issued has been increasing in recent years, with a 25% increase in the year since 2014 (Figure 3.17). This increase relates almost entirely to new employment permits issued for professional occupations (Figure 3.18). In terms of sectors (Figure 3.19),

- the IT and health sectors accounted for the largest numbers of new permits in the period examined
- the IT sector has experienced a steady growth, particularly evident since 2012
- there was a large rise in the number of permits issued for those employed in the health sector since 2013, primarily related to a change in the methods used for health workers to gain employment permits⁵.

⁵ Over the period 2010 to 2013, doctors entered the Irish labour market through channels other than the employment permit scheme.

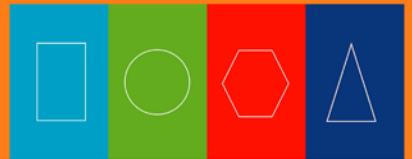


Figure 3.17: New employment permits, 2011-2015

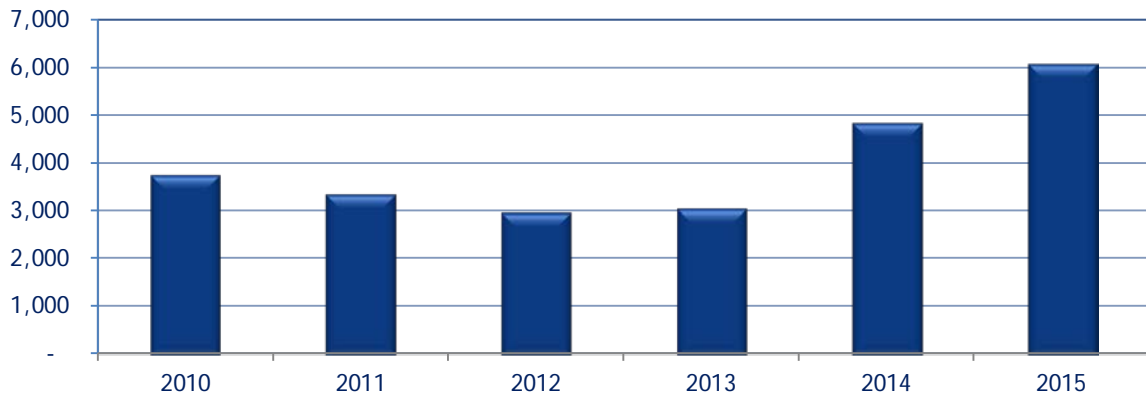


Figure 3.18 New employment permits by broad occupation, 2011-2015

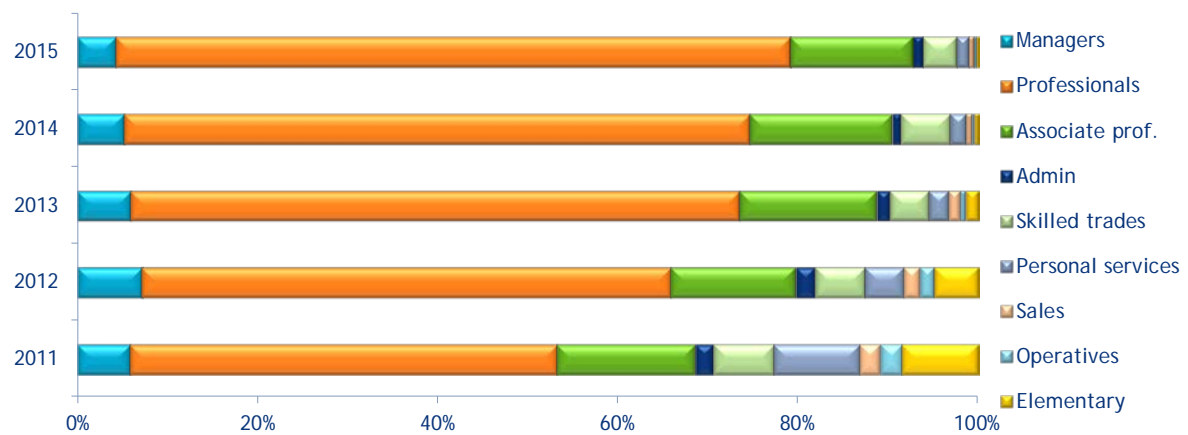
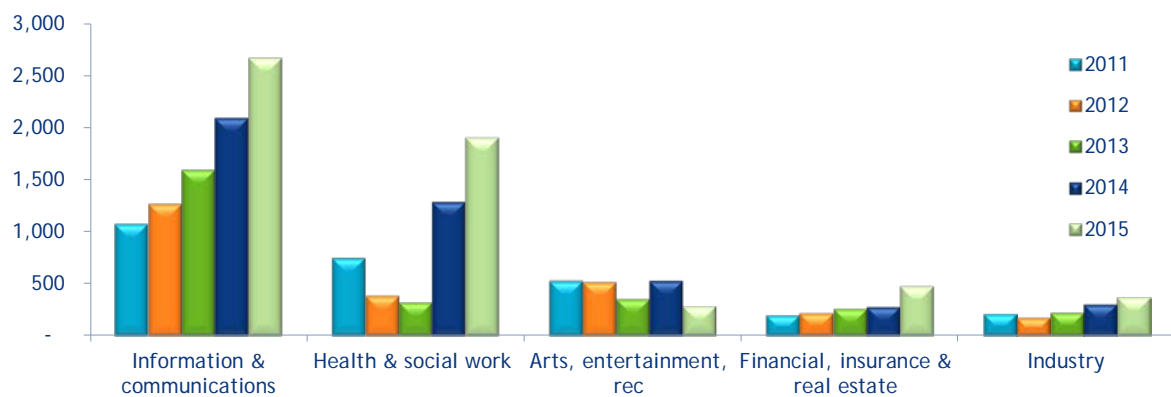


Figure 3.19: New employment permits for selected sectors*, 2011-2015



*in 2015, these five selected sectors account for 94% of all new permits issued

Source: DJEI

Table 3.1: Key indicators of vacancy trends

	Numbers employed	Expansion demand	Replacement demand		Job Churn	Recent job hires 2015 - % of total/number	CSO Job Vacancy rate Q3 2015	Recruitment Agency Survey - DTF	IrishJobs.ie Vacancies 2015		DSP Jobs Ireland Vacancies 2015	
			Employment change y-o-y - % of total/ number	Exits to inactivity 2014- % of total/ number					Recruitment requirement (Expansion + exits) - % of total/ number	Inter + Intra transitions, 2014 - % of total/ number	Share of IrishJobs.ie vacancies	Key vacancies 2015
Professional, scientific & technical	122,600	5%	4%	6%	7%	6%	2.1%	3%	37%	<ul style="list-style-type: none"> Process/project engineers Financial accountants Quality roles - quality assurance engineers, regulatory affairs, compliance HR roles Marketing Financial analysts Technicians (lab, manufacturing, mechanical etc.) 	4%	<ul style="list-style-type: none"> Associate professionals (brand ambassadors/promotional staff, interpreters, recruitment consultants, CAD technicians) Professionals (software developers, games tester/designers, accountants)
		5,700	5,100	10,800	18,800	19,600						
Information & communications	83,700	6%	4%	5%	5%	5%	2.6%	38%	15%	<ul style="list-style-type: none"> IT programmers (with Java, Oracle/SQL, .net) Systems analyst/engineer Web developer Architect (technical, business intelligence etc.) Technicians - tech support, administrators (database, systems, support) 	3%	<ul style="list-style-type: none"> Associate professionals (tech support with languages) Professionals (software developers, games tester/designers)
		4,400	5,100	9,500	12,400	14,900						
Financial, insurance & real estate	99,800	-3%	4%	1%	6%	5%	2.4%		12%	<ul style="list-style-type: none"> Analyst (business, risk, financial, data, operations, security, systems); financial managers; customer/client services Financial administrators (accounts payable/ receivable, fund accountants, pensions) 	0%	
		-3,300	5,600	2,300	15,100	14,300		4%				
Human health & social work	253,400	2%	12%	10%	12%	9%	1.0%	12%	8%	<ul style="list-style-type: none"> Nurses (staff, clinical nurses, theatre and to a lesser extent, community, cancer, psychiatric, paediatric) Medical practitioners (paediatric, oncology, orthopaedic) Pharmacists, physiotherapists, psychologists, radiographers and speech and language therapist Care workers 	17%	<ul style="list-style-type: none"> Care workers; nurses
		3,900	15,400	19,300	31,700	28,400						

	Numbers employed	Expansion demand	Replacement demand		Job Churn	Recent job hires 2015 - % of total/number	CSO Job Vacancy rate Q3 2015	Recruitment Agency Survey - DTF	IrishJobs.ie Vacancies 2015		DSP Jobs Ireland Vacancies 2015	
			Employment change y-o-y - % of total/number	Exits to Inactivity 2014- % of total/number					Recruitment requirement (Expansion + exits) - % of total/number	Inter + Intra transitions, 2014 - % of total/number	Share of IrishJobs.ie vacancies	Key vacancies 2015
Administrative & support service	68,000	4%	3%	4%	4%	5%	1.2%	1.2%	8%	<ul style="list-style-type: none"> Customer service/ technical support with languages General admin, receptionists 	17%	<ul style="list-style-type: none"> Census enumerators Administrators (office, accounts, sales), receptionists Security guards, cleaning
		2,800	4,600	7,400	10,800	15,300						
Wholesale & retail trade	273,800	-1%	15%	10%	14%	17%	0.7%	1%	7%	<ul style="list-style-type: none"> Sales representatives (with languages), field/inside/area sales agents, business development Sales assistants 	12%	<ul style="list-style-type: none"> Retail sales assistants, fundraisers, telesales; butchers, mechanics
		-1,400	19,700	18,300	37,700	53,700						
Industry	252,300	6%	8%	13%	15%	13%	0.6%	28%	4%	<ul style="list-style-type: none"> Engineers (process, manufacturing, quality) 	11%	<ul style="list-style-type: none"> Process operatives Stock-takers/buyers Fitters, welders Engineers
		13,500	10,400	23,900	39,400	41,000						
Accommodation & food services	139,900	0%	11%	8%	10%	13%	0.8%	4%	2%	<ul style="list-style-type: none"> Sales/deli assistants, chefs, catering assistants 	13%	<ul style="list-style-type: none"> Chefs Kitchen & catering assistants Waiters/waitresses
		0	14,700	14,800	25,600	41,400						
Construction	127,400	13%	5%	12%	7%	8%	0.7%	3%	2%	<ul style="list-style-type: none"> Quantity surveyors, property managers 	8%	<ul style="list-style-type: none"> Electricians, carpenters, plumbers, steel fixers Drivers (machine, dumper) v
		15,000	7,200	22,200	18,800	26,000						
Education	146,600	2%	9%	8%	6%	6%	0.7%		1%	<ul style="list-style-type: none"> Instructors/course tutors, assistant lecturer 	4%	<ul style="list-style-type: none"> Tutors; Childcare workers
		2,500	11,800	14,300	15,300	17,700						
Transportation & storage	90,000	3%	4%	4%	3%	3%	0.3%	1%	1%	<ul style="list-style-type: none"> Drivers (artic, multi-drop, HGV) Air freight coordinator, warehouse managers/operatives 	6%	<ul style="list-style-type: none"> Large goods vehicle drivers (artic, HGV, rigid, multidrop) Warehouse operatives
		2,500	4,800	7,300	9,000	10,900						
Public administration & defence	101,300	3%	3%	4%	2%	2%	0.9%	0%	1%	<ul style="list-style-type: none"> Researchers, lecturers, clinical nurse managers 	0%	
		3,200	4,400	7,600	5,800	5,000						
Arts, entertainment, recreation & other service	92,900	5%	4%	4%	2%	5%	0.9%	0%	1%	<ul style="list-style-type: none"> Graphic designers, sports instructors 	2%	<ul style="list-style-type: none"> Hairdressers/barbers
		4,300	5,100	8,300	6,600	15,300						



4. Industry

Employment change: At over 250,000, this sector accounts for the third highest number of persons employed across all sectors; there was a 6% increase in employment in the year since quarter 3 2014 resulting in an additional 13,500 persons. (Figure 4.1)

Vacancy rate: according to EHECS, the vacancy rate for this sector has been below the rate for all NACE economic sectors for most of the period since the start of 2013, standing at 0.6% in quarter 3 2015. (Figure 4.2)

Transitions: at 13%, this sector had one of the highest shares of transitions in 2014; intra sectoral transitions accounted for almost a third of all transitions, with a higher share than the overall of persons entering this sector from unemployment and also from other sectors (inter). (Figure 4.3)

Recent job hires: despite the low vacancy rate, but consistent with the high transitions rate, this sector reported a high number of recent job hires with over 41,000 reported in 2015 (Figure 4.5):

- in terms of education level, 42% of new hires held higher secondary/FET education while a further 41% had third level qualifications
- almost a third of new hires were for those aged 15-24 (this age group accounts for a large share of the increases in job hires in recent years), with a further 31% aged 25-34
- over a quarter of new hires were for operative roles (e.g. food processing operatives, assemblers), with a further fifth for skilled tradespersons (e.g. fitters)
- the majority (80%) of filled positions were for full-time roles.

Employment permits: this sector accounted for 6% of all new permits issued in 2015; over half were for professionals (primarily for engineering roles); intra-company transfers accounted for 44% of all new permits issued in 2015, with critical skills permits accounting for a further third. (Figure 4.4)

DSP Jobs Ireland - industry accounted for 11% of all DSP Jobs Ireland vacancies in 2015; increases in recent years relates primarily to a rise in notifications for process operatives (in 2015, this occupation accounted for a quarter of all industry vacancies for this source).

Professionals	<ul style="list-style-type: none"> ▪ Engineers (including manufacturing, mechanical, maintenance, process, quality, refrigeration and HVAC service engineer)
Associate professionals	<ul style="list-style-type: none"> ▪ Inventory stock taker, purchasing/buyer, production manager
Skilled trades	<ul style="list-style-type: none"> ▪ Fitters, welders (coded, stainless steel, MIG/TIG, butt/electric fusion), steel fabricators, bakers
Operatives	<ul style="list-style-type: none"> ▪ Process operatives*, food production operatives, forklift drivers

*Process operatives - very few required the candidate to be fully experienced (56% required some experience while 33% of notified vacancies had no minimum level of experience required); these vacancies were spread across all regions; many were advertised through recruitment agencies; 70% were for general or production operatives.



IrishJobs.ie - 4% of all IrishJobs.ie vacancies in 2015 were for this sector, with a 36% increase on the previous year (primarily related to professional and associate professional roles).

Managers	<ul style="list-style-type: none"> Production, operations and supply chain management
Professionals	<ul style="list-style-type: none"> Process engineers, product/development technologist, manufacturing engineer/technologist Quality engineer, regulatory affairs specialist
Associate professionals	<ul style="list-style-type: none"> Technician (process, manufacturing, quality), production planner
Operatives	<ul style="list-style-type: none"> Manufacturing, process, production

DTF: 28% of all difficult to fill mentions in October 2015, primarily for professional roles:

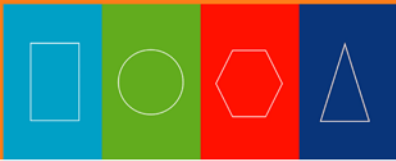
- Managers: production planning, supply chain
- Professionals: engineers (production and process, design and development, quality control and assurance, chemical engineers), scientists (chemical, biological, research and design, analytical and quality control analysts, food, validation and process), supply chain, accountants
- Technicians: biotech and extrusion, usually for medical devices
- Supply chain administrative roles
- Skilled trades (limited to TIG/MIG and ARC welding)
- Sales executives - technical sales representatives for the pharma/medical devices sectors
- Operatives (CNC and SMT/PTH Rework operators).

Job announcements: at approximately a fifth, this sector accounted for one of the most frequently occurring sectors for job announcements in the media in 2015, primarily related to the manufacture of food/beverages, pharmaceuticals, medical devices and machinery/equipment with the positions announced spanning a range of occupations and including

- Professionals: engineers (R&D, quality control, design, mechanical) and scientists (R&D, food, chemical and material)
- Associate professionals: engineering technicians (testers), food science technicians, sales and marketing associate professionals, business developers, HR personnel
- Skilled trades: butchers/de-boners; food/beverage preparation
- Operatives: food/beverage processing operatives; production team leader.

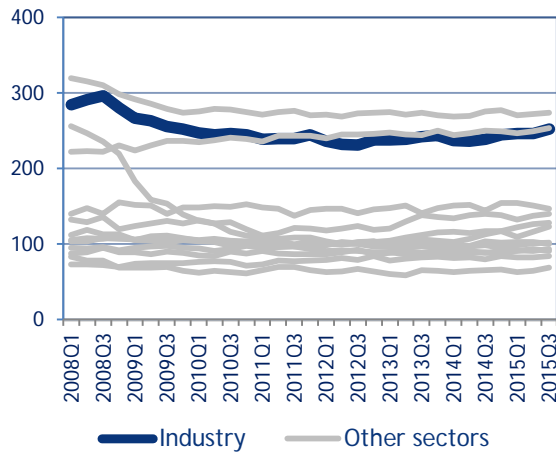
Most of the announcements were for fewer than 100 jobs, with approximately a fifth due to be made in the medium term.

Conclusions: despite low vacancy rates reported in the CSO figures, this is a large sector which means that even with low replacement rates, large volumes of job openings are likely to occur; indeed, growth has been observed in the most recent period and there is evidence of both a high level of recent job hires and difficulty in sourcing relevant persons across a variety of occupational groups; the transitions data also points to a high volume of churn in the sector most likely related to job openings for lower skilled occupations (such as operatives) where significant experience is not required.



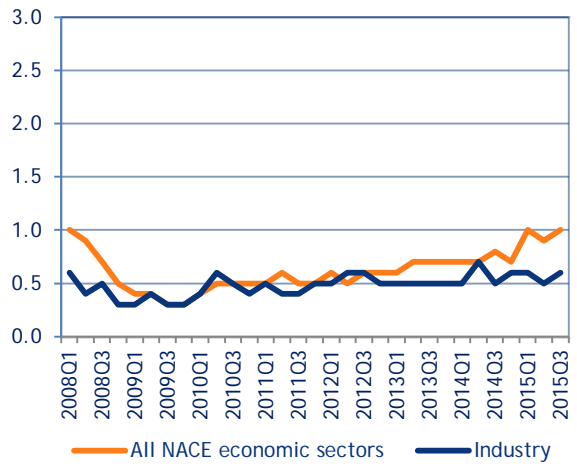
Key trends in Industry

Figure 4.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



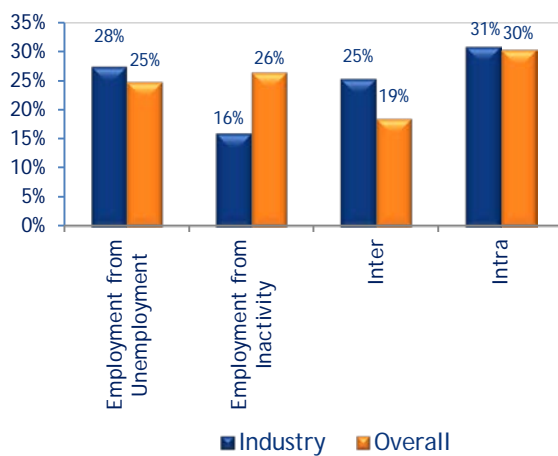
Source: SLMRU analysis of CSO QNHS

Figure 4.2: CSO Job Vacancies Rates, 2008-2015



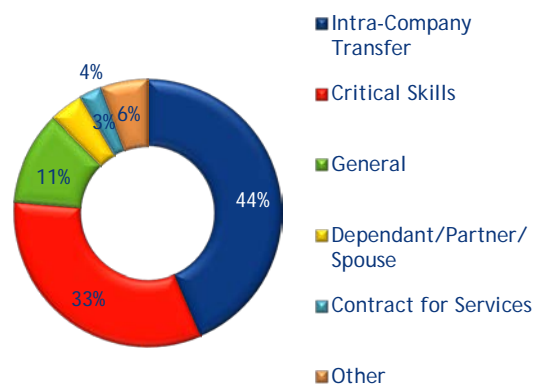
Source: SLMRU analysis of CSO EHECS data

Figure 4.3: Transitions, 2014



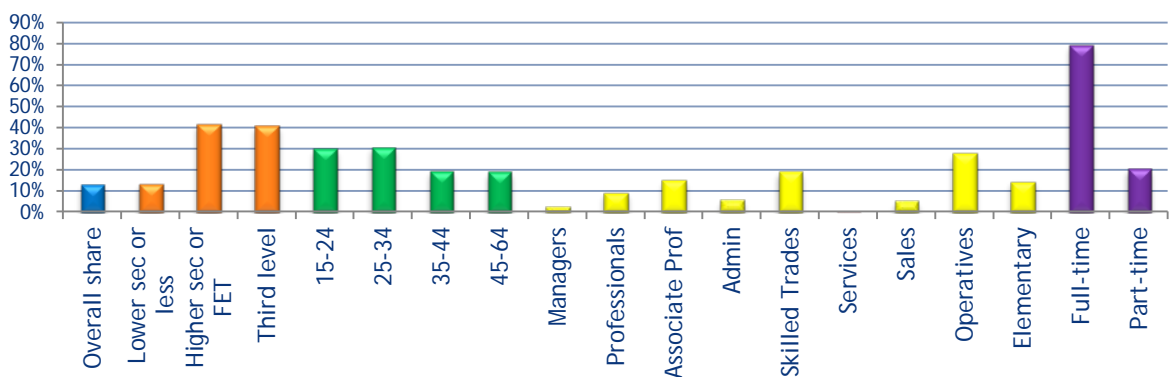
Source: CSO QNHS

Figure 4.4 Employment permits, 2015

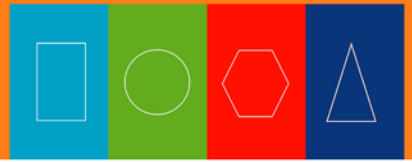


Source: DJEI

Figure 4.5: Recent hires, 2015



Source: CSO QNHS



5. Wholesale and retail trade

Employment change: this sector has the largest number of employees across all sectors, which has been the case throughout the recessionary period; a 1% decline in employment was recorded in the year since quarter 3 2014, representing a fall of 1,400 persons. (Figure 5.1)

Vacancy rates: the vacancy rate stood at 0.7% in quarter 3 2015 (Figure 5.2), with the rate consistently below the rate recorded for all sectors since the end of 2011.

Transitions: at 17%, this sector accounted for the highest share of all employment transitions in 2014; there was significant movement into the sector from unemployment and inactivity but also movement within the sector (intra). (Figure 5.3)

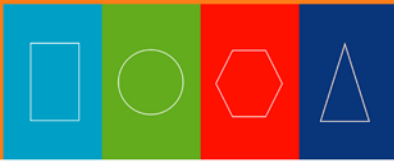
Recent job hires: this sector accounts for by far the highest share of recent job hires with on average 12,000 recent job hires recorded on a quarterly basis; in 2015, there were over 50,000 new hires recorded, accounting for 17% of all recent hires (Figure 5.4):

- over a half (51%) of those recently hired held higher secondary/FET education
- almost a half (48%) of the recent hires were aged 15-24
- the majority (58%) were employed in sales (retail sales assistants), with the remainder spread across the other occupations
- at 52%, recent hires were most likely to be part-time positions, one of only two sectors where part-time positions exceeded full-time.

Employment permits: this sector accounted for 1% of all new permits issued in 2015 (e.g. data analysts and business development managers).

DSP Jobs Ireland 2015: this sector accounted for 12% of all vacancies notified to DSP Jobs Ireland in 2015, primarily in sales and customer service roles; the number of advertised positions has been falling in recent years with a 15% decline since 2011. Many of the vacancies advertised were through recruitment agencies, with eight companies accounting for over a quarter of all vacancies for salespersons.

Sales & customer service	▪ Sales assistants (retail (e.g. convenience stores, petrol stations, supermarkets), counter, including deli and pharmacy); over half were for part-time positions
	▪ Fundraisers, field sales representatives and door to door salespersons, brand ambassadors (with a driving licence a requirement for many of these positions); no experience was required for over 40% of these positions
	▪ Merchandisers, inventory stock auditor
Skilled trades	▪ Butchers (retail and food processing), boners/trimmers



	<ul style="list-style-type: none"> ▪ Mechanics (car, HGV), NCT testers, fitters (including tyres), panel beaters, spray painters, valeters
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IrishJobs.ie: this sector accounted for 7% of all IrishJobs.ie vacancies in 2015. There has been some fluctuation in the number of vacancies advertised in the period since 2010, with a 5% decline since 2014; half of the vacancies in 2015 were for associate professional roles.

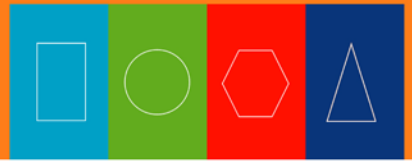
Managers	<ul style="list-style-type: none"> ▪ Retail/store managers
Associate professionals	<ul style="list-style-type: none"> ▪ Sales representatives (with languages), field/area sales agents, inside sales (with languages), account managers, business development ▪ Buyer, procurement officer
Administrative	<ul style="list-style-type: none"> ▪ Sales administrator, sales support
Sales & customer service	<ul style="list-style-type: none"> ▪ Retail sales assistants, telesales advisors ▪ Call centre/customer service advisors, collections specialists

DTF: 1% of all difficult to fill vacancies, primarily for professional roles

- Limited to highly specialised roles in sales and marketing and in the management of purchasing operations in retail (e.g. marketing managers - product strategy development and management)
- Fork lift operators/drivers.

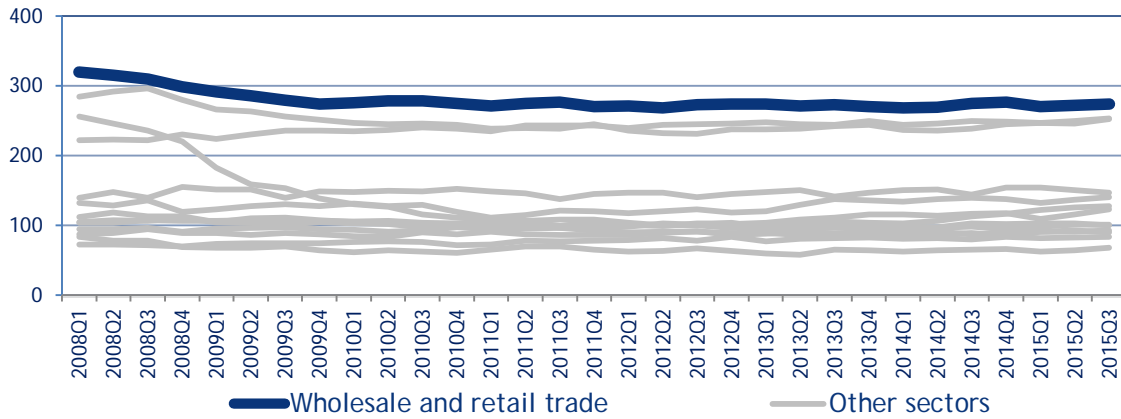
Job announcements: announcements in this sector were mainly for retail assistants, supervisors and managers across a range of retail outlets (e.g. grocery and clothing stores; service stations). Other positions announced were for security staff and financial roles. While many positions were associated with the opening of new retail outlets nationwide, a share were also temporary positions related to seasonal employment. Excluding the seasonal jobs, each job announcement, on average, was for 150 jobs, although many of these are expected to be rolled out over a period of two-to-five years.

Conclusions: the transitions and recent job hire data suggest significant job openings in this sector despite a fall in employment and a low vacancy rate; there is little indication of difficulty in sourcing candidates with the retention of staff presenting a greater issue for this sector.



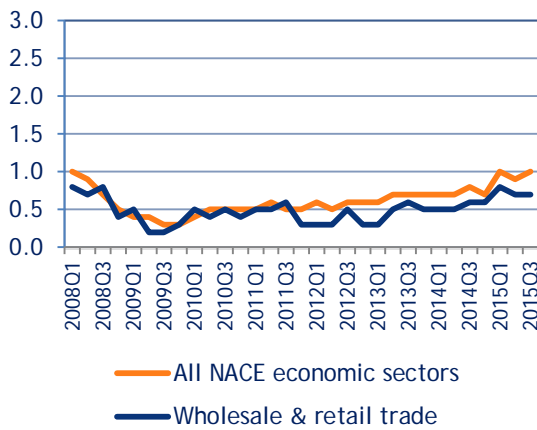
Key trends in the wholesale and retail sector

Figure 5.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



Source: SLMRU analysis of CSO QNHS

Figure 5.2: CSO Job Vacancies Rates, 2008-2015



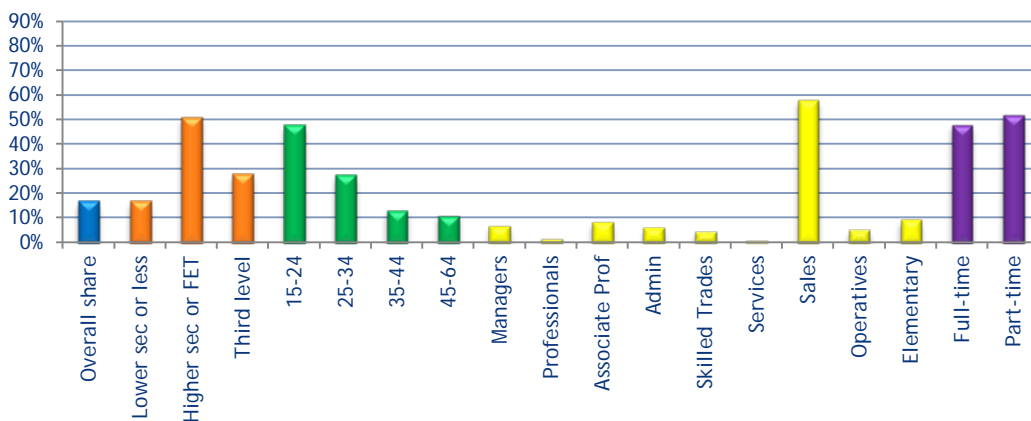
Source: SLMRU analysis of CSO EHECS data

Figure 5.3: Transitions, 2014

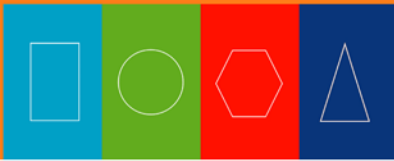


Source: CSO QNHS

Figure 5.4: Recent hires, 2015



Source: CSO QNHS



6. Construction

Employment change: while employment levels remain significantly below pre-recession levels, there has been substantial employment growth recently in this sector with approximately 15,000 additional persons employed in the year since quarter 3 2014 (primarily in skilled trades), accounting for the highest share of absolute growth across all sectors. (Figure 6.1)

Vacancy rate: at 0.7% in quarter 3 2015, the vacancy rate, as recorded through the EHECS, was relatively low despite the recent increase in employment numbers; there are signs of growth, however, albeit from a low base. (Figure 6.2)

Transitions: 9% of all transitions recorded in 2014 were in this sector; of these, 39% were previously unemployed, a much higher rate than the overall share of 25%. (Figure 6.3)

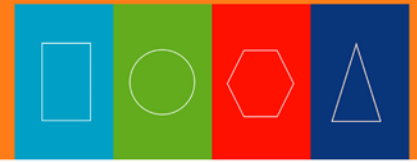
Recent job hires: since the recession, an average of approximately 5,500 new hires occurred each quarter, with indications of growth in the number of hires in recent years; of the 26,000 recent hires in 2015 (Figure 6.4):

- more than a half had attained higher secondary education/FET
- the age of those recently hired was spread across all age categories
- over a half (52%) were in skilled trades with the remainder divided mostly between operative and elementary positions
- full-time positions accounted for over two thirds of all recent hires.

DSP Jobs Ireland: this sector accounted for 8% of notified vacancies in 2015. There has been a notable increase in the number of vacancies in this sector in recent years, with a 260% increase since 2011, and a 47% increase since 2014; most of this increase relates to a higher number of vacancies for skilled trades occupations. In terms of the skilled trades' vacancies, recruitment agencies feature strongly (and therefore it is difficult to gauge the number of posts on offer). Experience was considered key with 60% of vacancies requiring candidates to be fully experienced.

Electricians	▪ Including commercial, industrial and field service technicians; there has been a notable increase in the number of vacancies for apprentice electricians since the previous year
Carpenters	▪ Including 1 st /2 nd fix carpenters, shuttering and joiners
Plumbers	▪ Including industrial, domestic/commercial, pipe fitters
Other trades	▪ Steel fixers, plasterers, bricklayers/stonemasons
Drivers	▪ Machine drivers/operators, dumper (site/artic), teleporter
Other operatives	▪ Groundworker/pipefitter, scaffolders (both basic and advanced)

IrishJobs.ie: 2% of notifications in 2015 for positions including quantity surveyors and property managers.



DTF: 3% of all difficult to fill mentions in October 2015, primarily for professional roles:

- project managers
- quantity surveyors
- BIM (building information modelling, CAD)
- a small number of skilled trades (steel fixers, pipe layers, shuttering carpenters, and electricians)
- operators of specific machinery employed at construction sites (tower crane operator/banksman, site dumper truck drivers).

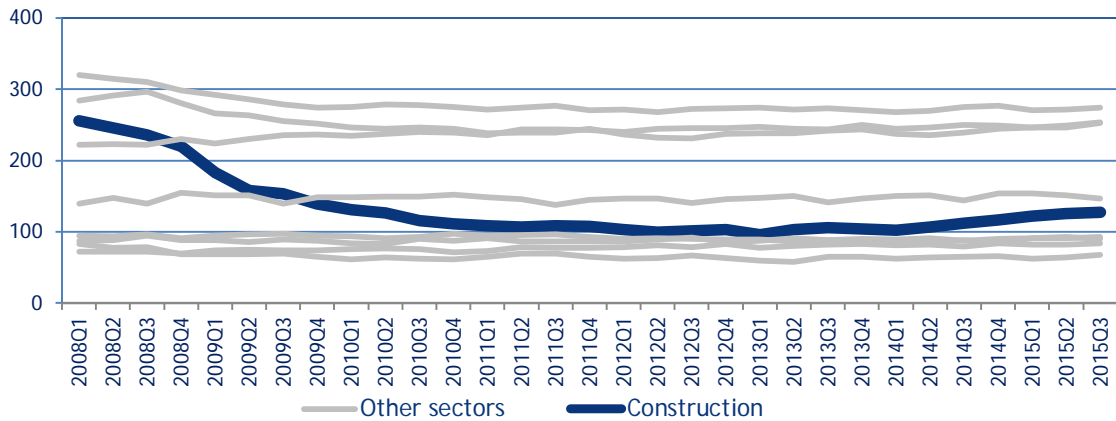
Job announcements: Construction jobs accounted for a significant number of jobs announced in the media throughout 2015. The vast majority of these jobs, however, were temporary; most of the jobs were associated with expanding and new activities in manufacturing (especially pharmaceuticals and food/beverage manufacturing) and IT and, to a lesser extent, utilities (energy), health/education and retail. The positions announced were not specified, but are likely to require mainly construction professionals (civil engineers, architects and surveyors), skilled tradespersons (e.g. electricians, steel erectors) and elementary construction workers.

Conclusions: this is a sector that is showing considerable signs of growth, particularly in the area of skilled trades; all indicators, including the vacancy rate, recent job hires, and volume of vacancy notifications show upward trends for this sector; the transitions data indicates that a large share of persons entering this sector were previously unemployed.



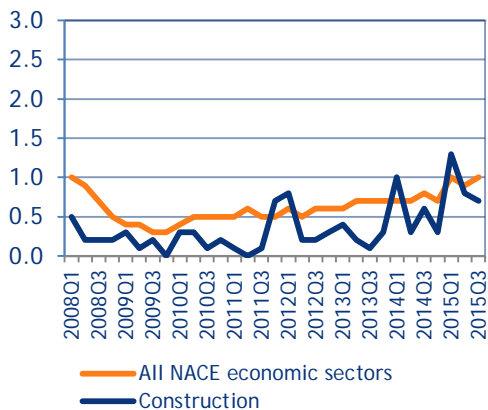
Key trends in the construction sector

Figure 6.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



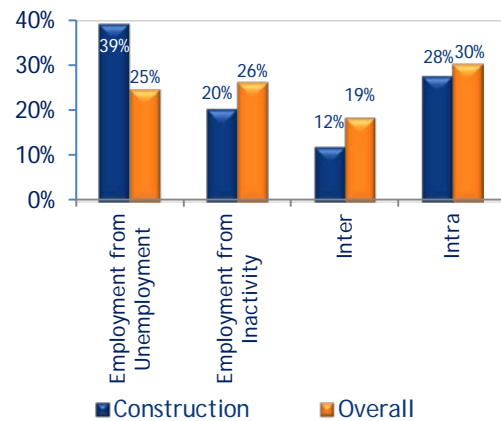
Source: SLMRU analysis of CSO QNHS

Figure 6.2: CSO Job Vacancies Rates, 2008-2015



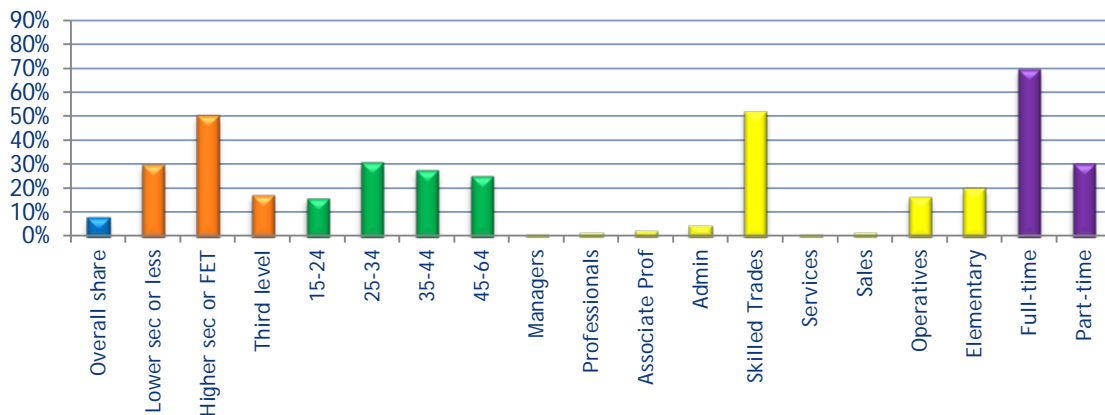
Source: SLMRU analysis of CSO EHECS data

Figure 6.3: Transitions, 2014

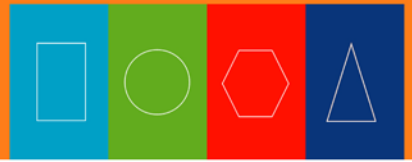


Source: CSO QNHS

Figure 6.4: Recent hires, 2015



Source: CSO QNHS



7. Accommodation and food services

Employment change: there was no change in the numbers employed in this sector between quarter 3 2015 and the same period in the previous year. (Figure 7.1)

Vacancy rates: while the vacancy rates for this sector are below the overall rate for all sectors, some growth has occurred; the rate grew from 0.4% in quarter 3 2014 to 0.8% in quarter 3 2015 (Figure 7.2).

Transitions: this sector had the third highest share of transitions in 2014, with a much higher share (37%) of transitions than the overall for all sectors (26%) for those previously classified as inactive. (Figure 7.3)

Recent job hires: this sector had the highest share of recent new hires after the wholesale/retail sector; in 2015, of the 41,400 recent hires (Figure 7.4):

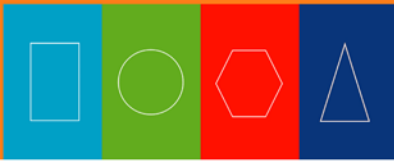
- almost a half (46%) held higher secondary education/FET
- approximately a half (47%) were for those aged 15-24 years with very few hires recorded for those aged 35 or above
- two-thirds were for elementary occupations (e.g. waiters, kitchen assistants)
- three fifths of recent hires were for part-time positions.

Employment permits: this sector accounted for 2.5% of all new permits issued in 2015, most of which were general permits and were primarily related to ethnic chefs; over 90% of new permits issued for this sector were for positions with salaries of less than €40,000.

DSP Jobs Ireland: this sector accounted for 13% of notified vacancies in 2015, with vacancies for chefs accounting for almost a third of these.

Chefs*	<ul style="list-style-type: none"> ▪ Chef de partie, commis, sous and head chefs; also breakfast chefs, pizza chefs; ethnic chefs, mainly Indian, Chinese and Thai
Kitchen and catering assistants	<ul style="list-style-type: none"> ▪ Primarily in catering, but also for porters, deli/counter staff and baristas ▪ Two thirds were full-time positions; 70% required some experience
Waiters/waitresses	<ul style="list-style-type: none"> ▪ Recruitment agencies and catering companies accounted for a large share of the vacancies advertised; over half were part-time positions and most required at least some experience
Managers	<ul style="list-style-type: none"> ▪ Restaurant and hotel managers

*Chefs: most jobs were full-time, with a high share (54%) requiring candidates to be fully experienced. While notifications through recruitment agencies accounted for a bulk of vacancies, there was also many through hotels, restaurants and cafes. Vacancies were spread across the regions, with Dublin only accounting for 30% of vacancies.



IrishJobs.ie: this sector accounted for 2% of notified vacancies in 2015, with positions including:

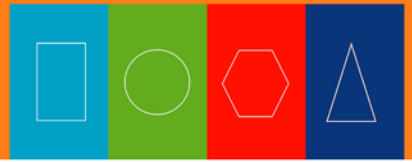
- sales and deli assistants
- chefs (head, chef de partie, sous, commis)
- catering assistants.

DTF: 4% of all difficult to fill mentions reported in October 2015 in areas including:

- chefs
- waiting/bar staff
- receptionists (hotel accommodation)
- sales & marketing roles (e.g. sales director)
- management (e.g. hotel revenue manager, hotel operations manager)
- beauty therapists.

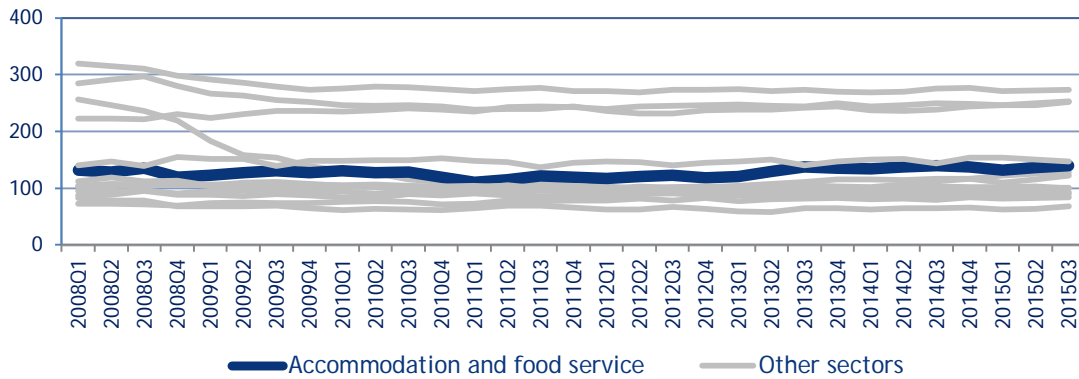
Job announcements: there were comparatively few job announcements in the media for positions in the accommodation and food sector; the jobs announced were chiefly for bar and catering staff, with a smaller number for chefs, customer service and HR roles.

Conclusions: despite relatively static employment numbers, this sector has experienced considerable churn, primarily for elementary occupations, taken up mainly by young cohorts with less than third level education; vacancies for chefs have been occurring frequently, although the high share of vacancy notifications through recruitment agencies rather than directly by employers leads to a difficulty in ascertaining the number of actual posts on offer.



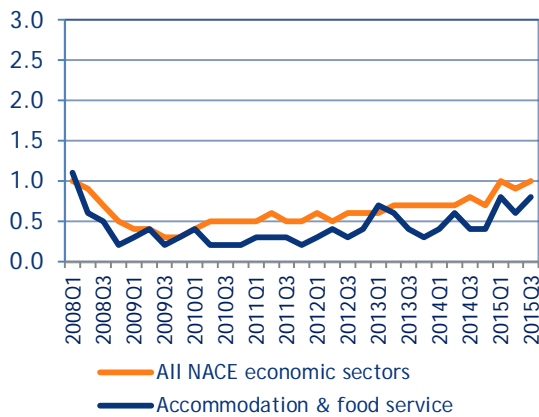
Key trends in the accommodation and food service sector

Figure 7.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



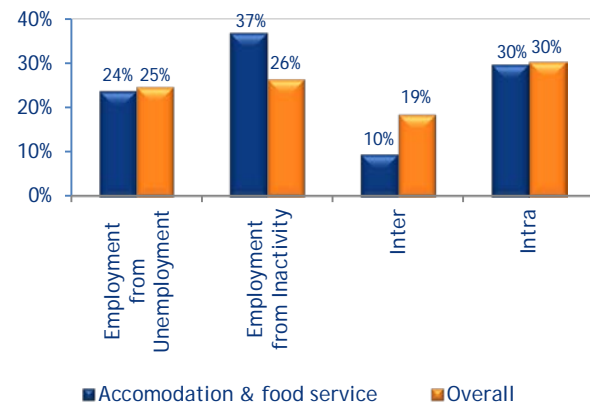
Source: SLMRU analysis of CSO QNHS

Figure 7.2: CSO Job Vacancies Rates, 2008-2015



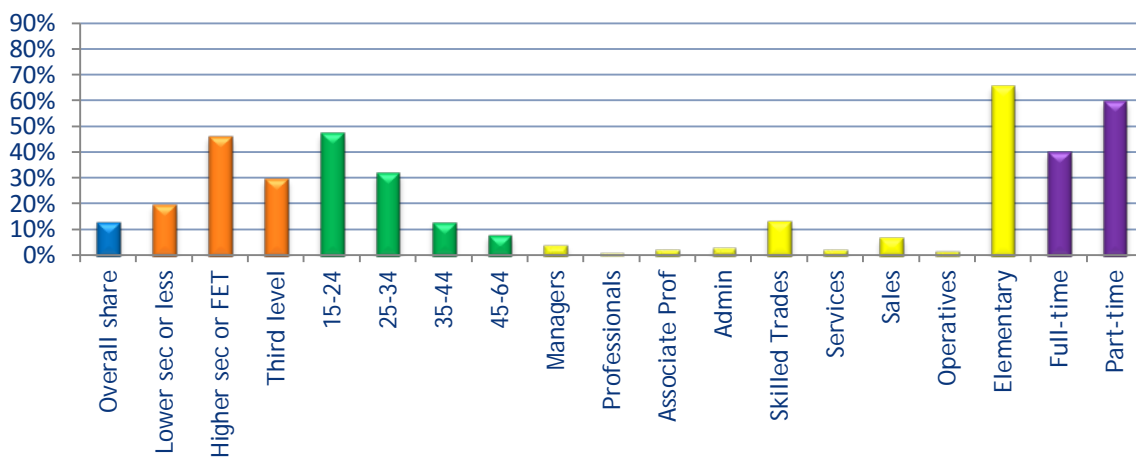
Source: SLMRU analysis of CSO EHECS data

Figure 7.3: Transitions, 2014

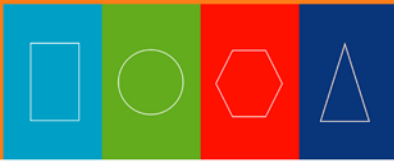


Source: CSO QNHS

Figure 7.3: Recent hires, 2015



Source: CSO QNHS



8. Information and communications

Employment change: there was a 6% increase in employment in this sector between quarter 3 2014 and quarter 3 2015, representing an additional 4,400 persons. (Figure 8.1)

Vacancy rates: along with the financial sector, this sector consistently had one of the highest vacancy rate across all sectors; in quarter 3 2015, this rate stood at 2.6%, compared to 1.0% for all sectors. (Figure 8.2)

Transitions: this sector accounted for 4% of all transitions in 2014: 42% of all transitions for this sector were for those already employed in the sector, compared to 30% for all sectors. (Figure 8.3)

Recent job hires: approximately 3,000-5,000 recent job hires have been recorded each quarter; of the combined 15,000 new hires in 2015 (Figure 8.5):

- over two thirds (67%) were for persons with third level qualifications
- a half were aged 25-34, with the remainder spread across all other age categories
- professionals and associate professional roles each accounted for a 32% share of new hires
- the majority (86%) of new hires were for full-time roles.

Employment permits: this sector accounts for the highest share of new employment permits issued each year indicating difficulties in sourcing skills for this sector from the available labour market; in 2015, 55% of new permits were for critical skills with a further fifth for intra-company transfers (Figure 8.4). This sector accounted for:

- 39% of all new employment permits, primarily for professional occupations (e.g. IT business analysts, programmers) and associate professional roles (e.g. IT technicians, sales executives)
- most were issued for employment in the Dublin area but also in Kildare and Cork
- most new employment permit holders had a degree or masters qualification
- over a half (51%) were for positions earning between €30,000 and €49,999.

IrishJobs.ie: this sector accounted for 15% of notified vacancies in 2015, with slight increases observed in the number of vacancies advertised in the last two years; almost all of the vacancies reported for this sector were for professional and associate professional roles.

Professionals	<ul style="list-style-type: none"> ▪ IT programmers (with Java, Oracle/SQL, .net) ▪ Other IT (systems analysts/engineers, technical architects, test engineers, web developers, applications developers/support, IT/cyber security analyst) ▪ Business professionals - business analysts (e.g. with skills in SAP), risk, business intelligence
Associate professionals	<ul style="list-style-type: none"> ▪ IT technicians - tech support (language skills often a requirement), administrators (database, systems, support) ▪ Analysts (business, technical, data), account managers



DSP Jobs Ireland: this sector accounted for 3% of all vacancies advertised through the DSP Jobs Ireland in 2015; although this represents a slight increase on the previous year, over the five year period from 2011 to 2015 a 40% decline occurred (related to a fall in the number of vacancies reported for IT technicians); the majority of vacancies advertised were for associate professional posts.

Associate professionals	<ul style="list-style-type: none"> ▪ Technical support (with languages)
Professionals	<ul style="list-style-type: none"> ▪ Software engineers/developers, vacancies related to games (testers, designers)

DTF: 38% of all difficult to fill mentions in October 2015 were for this sector, primarily for professional roles in software development:

- software developers: with skills/experience in .NET, C#, C++, Java, PHP, Python and UI/UX technologies; web and mobile app developers; database developers/engineers with Oracle/SQL
- engineers: network (LINUX, Open Source), quality assurance (security, digital forensics), test, backend (API), internet protocol
- systems architects
- business intelligence: BI solutions, big data analysts (e.g. Hadoop), ERP with SAP/Oracle; information security analyst
- tech support: with languages
- managerial roles: project managers, digital marketing.

Job announcements: this sector accounted for approximately one quarter of all job announcements made in the 2015; the most frequently mentioned roles were in data analytics, IT security, e-commerce (financial transactions/payments), cloud computing, telecommunications and Software as a Service (SaaS) along with a significant number of roles in IT contact centres; IT positions most frequently mentioned included:

- IT professionals: R&D specialists; IT project managers, data & business analysts, engineers (quality assurance, product development), software developers, testers
- IT associate professionals: IT user support technicians
- Skilled trades persons: telecommunication and other IT engineers

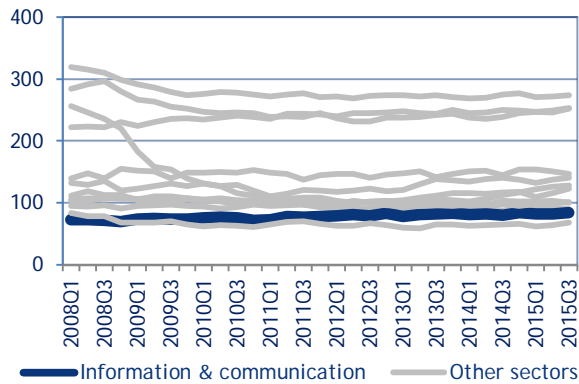
While most of the job mentions were for IT skills, there were also a substantial number of jobs announced for business developers, marketing and sales account executives, and HR staff in the IT sector.

Conclusions: the overall employment growth in this sector in recent years has been steady with some of the main indicators examined here (recent job hires, DTF, IrishJobs.ie etc.) pointing to a vibrant jobs market, with demand particularly for young, high skilled persons. While expansion was evident, a share of the job openings occurring was due to churn, with transitions data showing significant movement within the sector. The Recruitment Agency Survey and employment permit data indicate that significant shortages of persons with specific IT skills are presenting issues for the sector.



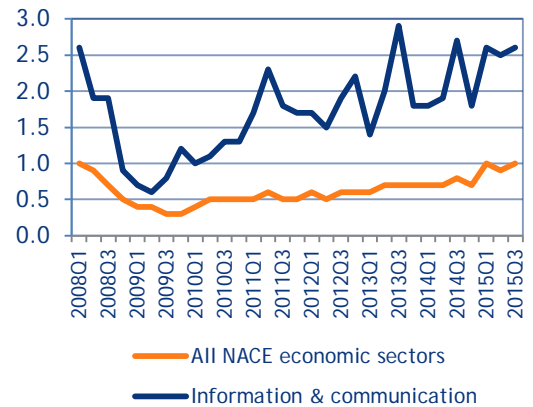
Key trends in the information and technology sector

Figure 8.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



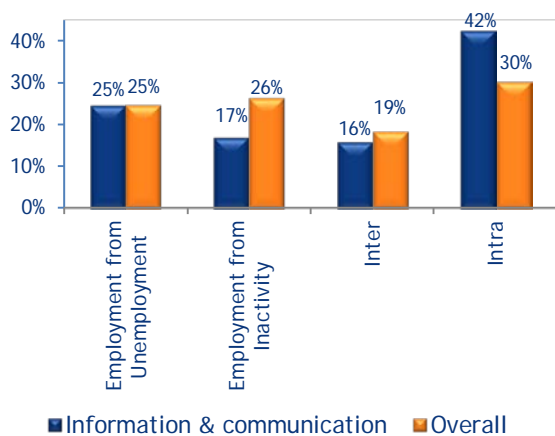
Source: SLMRU analysis of CSO QNHS

Figure 8.2: CSO Job Vacancies Rates, 2008-2015



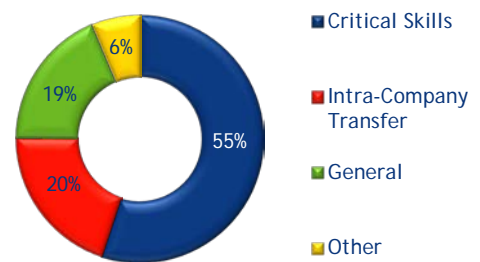
Source: SLMRU analysis of CSO EHECS data

Figure 8.3: Transitions, 2014



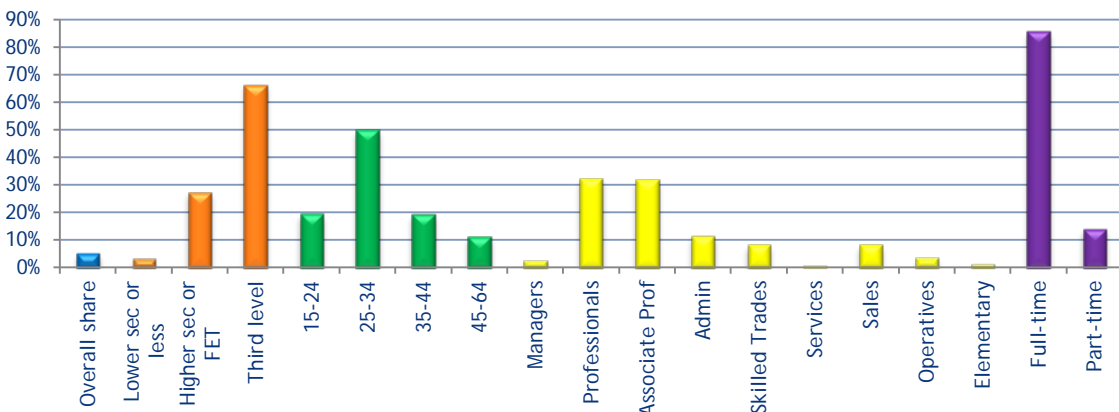
Source: SLMRU analysis of CSO QNHS

Figure 8.4: Employment permits by type, 2015



Source: DJEI

Figure 8.5: Recent hires, 2015



Source: CSO QNHS



9. Financial, insurance and real estate

Employment change: this sector experienced a 3% decline in employment between quarter 3 2014 and quarter 3 2015 representing 3,300 fewer persons, primarily related to a fall in the numbers employed in professional and administrative roles. (Figure 9.1)

Vacancy rates: along with the IT sector, this sector consistently had the highest vacancy rate across all sectors; in quarter 3 2015, this rate stood at 2.4%, compared to 1.0% for all sectors. (Figure 9.2)

Transitions: this sector accounted for 5% of all transitions in 2014, with 39% of all transitions for this sector for those already employed in the sector (compared to a rate of 30% for all sectors). (Figure 9.3)

Recent job hires: in 2015, there were 14,300 recent hires in this sector (Figure 9.5):

- most persons (70%) recently hired held third level qualifications, with a further 27% holding higher secondary or FET qualifications
- those aged 25-34 accounted for the largest share of recent hires at 39%, with the remainder divided between the other age categories
- most were engaged in administrative (40%) or associate professional positions (26%)
- the majority of new hires were in full-time posts (81%).

Employment permits: this sector accounted for 6% of new permits issued in 2015:

- two-thirds were for critical skills employment permits (Figure 9.4)
- permits were issued primarily for professional and associate professional roles in:
 - IT: software engineer/developer, analyst (IT support, cyber-crime, QA)
 - financial: senior audit, risk analysts, financial/data analysts
- almost all (91%) employment permit holders had a degree or higher
- 39% were earning salaries of €60,000 or more.

IrishJobs.ie - 12% of all vacancies notified in 2015 were for this sector; a sustained growth was observed in the number of vacancies reported in recent years, primarily attributed to associate professional, professional and administrative roles. In particular, this growth has been most notable in increased notifications for IT professional occupations and associate professional/admin in finance related areas.

Professionals	<ul style="list-style-type: none">▪ IT - analysts (business, operations, security, systems), software developers/engineers▪ Finance - risk analysts, business analysts, project managers and financial accountants
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Associate professionals	<ul style="list-style-type: none"> Analysts (business, financial, data) Claims officers (with languages), underwriters, tax advisors, credit risk officers, transfer agents
Administrative	<ul style="list-style-type: none"> Fund accountants Administrators in banking, pensions, claims
Other	<ul style="list-style-type: none"> Managers (financial, banking etc.) Customer/client services

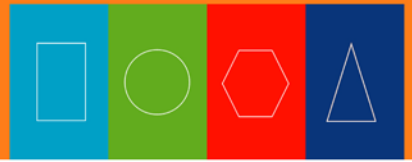
DSP Jobs Ireland - there were no notified vacancies for this sector in 2015.

DTF: this sector accounted for 4% of all difficult to fill mentions in October 2015 in areas such as:

- fund industry - financial accountants, fund accounting supervisory roles, administrative and technical support roles
- regulatory & compliance skills - investment protection and regulation
- deposit and treasury management roles
- risk analysts and actuaries
- financial clerks (credit control, accounts payable and debt recovery); a foreign language was often required for these posts.

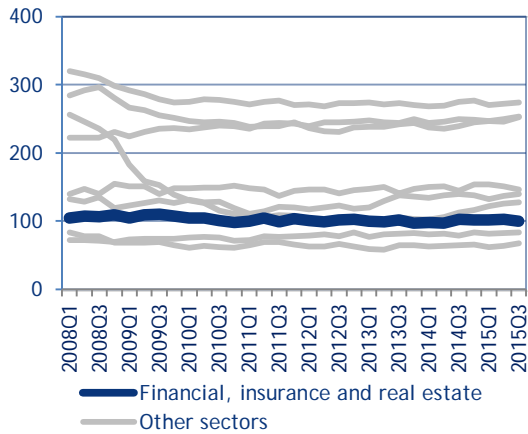
Job announcements: job announcements that appeared in the media for this sector included positions for financial and risk analysts, qualified financial advisors, and sales associate professionals; many roles also called for IT expertise, including data and business analytics, cyber security, and software development.

Conclusions: the high vacancy rates for this sector were in contrast with the fall in employment levels; the transitions data, which shows a high level of movement within the sector, suggests that while opportunities may exist in this sector at the associate professional/administrative level, a high level of churn may be a contributing factor to this. The appearance of this sector in employment permit data and difficult to fill vacancies indicate that employers were still having issues with finding suitably qualified staff in some areas.



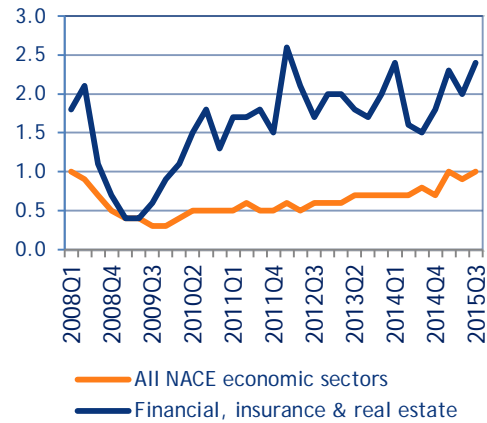
Key trends in the financial, insurance and real estate sector

Figure 9.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



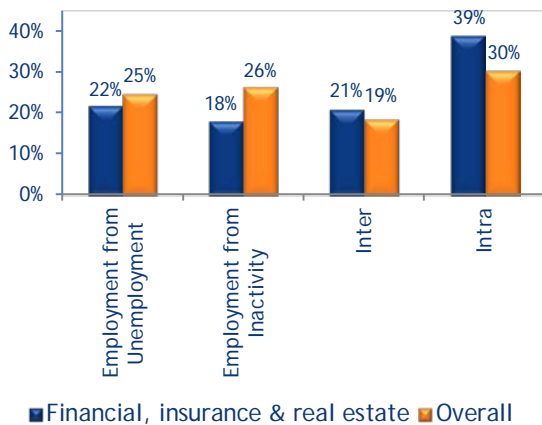
Source: SLMRU analysis of CSO QNHS

Figure 9.2: CSO Job Vacancies Rates, 2008-2015



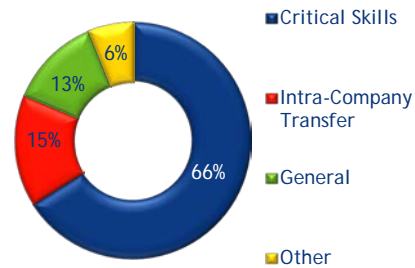
Source: SLMRU analysis of CSO EHECS data

Figure 9.3: Transitions, 2014



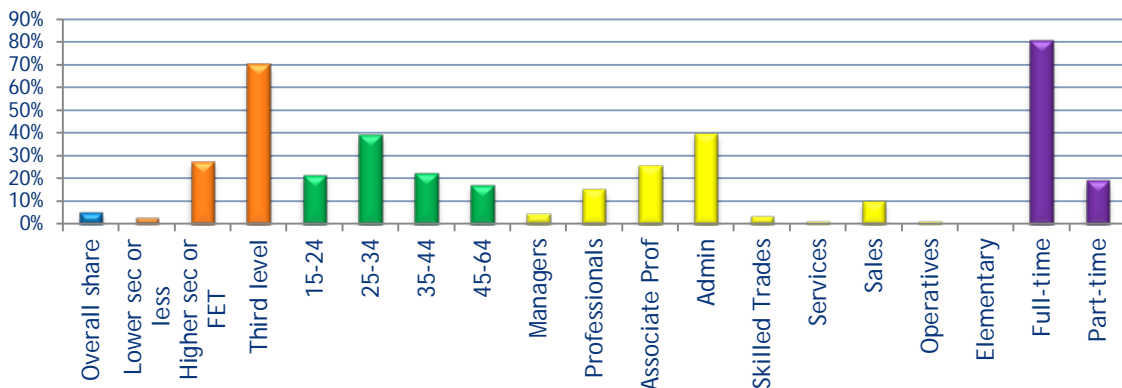
Source: CSO QNHS

Figure 9.4: Employment permits by type, 2015

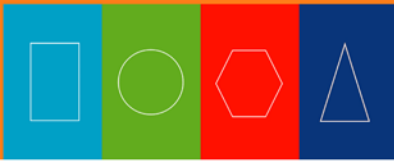


Source: DJEI

Figure 9.5: Recent hires, 2015



Source: CSO QNHS



10. Health and social work

Employment change: at 250,000, this sector accounts for a significant share of employment in Ireland; there was a 2% increase in employment in the year since quarter 3 2014 amounting to 3,900 additional persons. (Figure 10.1)

Vacancy rates: vacancy rates for this sector have been broadly in line with that of all sectors for most of the period examined (quarter 1 2008 to quarter 3 2015). (Figure 10.2)

Transitions: this sector accounted for 10% of all transitions in 2014 with significant movement between employers (39% compared to 30% for all sectors). (Figure 10.3)

Recent job hires: there were approximately 28,400 recent hires reported in 2015 (Figure 10.5):

- at 52%, the highest share of recent hires held third level qualifications; a further 37% held higher secondary education or FET qualifications
- over a third (37%) of recent hires were aged 25-34
- almost a half (48%) of recent hires were in services (care workers) with a further 29% for professionals (e.g. doctors and nurses)
- almost two thirds (57%) had attained full-time posts, although there was significant differences between occupational groups where 83% of professional posts were fulltime compared to 45% for those in personal services (e.g. care workers).

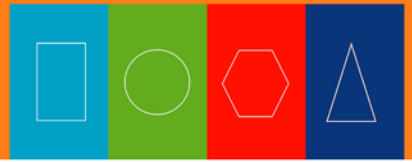
Employment permits: in 2015, 31% of all new employment permits were issued for this sector; 78% of new permits issued were general with a further 17% for critical skills (Figure 10.4):

- almost all (95%) were for professional occupations (mostly doctors) and held a minimum of a third level qualification
- most (60%) were paid between €30,000 and €49,999
- Dublin accounted for 29% of new permits issued with the remainder spread across all other regions.

DSP Jobs Ireland: this sector accounted for 17% of all vacancies advertised through the DSP Jobs Ireland website in 2015, with vacancies for care workers accounting for 80% of these.

Care workers*	▪ Relates to both those providing care in the home and in nursing homes
Professionals	▪ Nurses (staff, registered, psychiatric/mental health services, elderly)
Associate professionals	▪ Youth workers

*Care workers: recruitment agencies accounted for a large share of the vacancies posted; almost three quarters of the vacancies were for part-time work and only a small share (11%) required persons to be fully experienced (a further 70% required some experience and 16% required no experience).



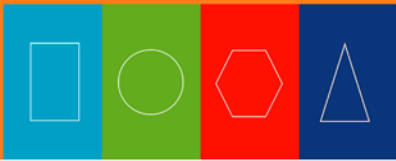
IrishJobs.ie: this sector accounted for 8% of all vacancies advertised in 2015 primarily for nurses, care workers, pharmacists and doctors along with sales and administrative roles; there has been a large increase in the number of health-related vacancies advertised in recent years, primarily related to an increase for professional roles.

Professionals	<ul style="list-style-type: none"> ▪ Nurses (staff, clinical nurses, theatre and to a lesser extent, community, cancer, psychiatric, paediatric) ▪ Medical practitioners (paediatric, oncology, orthopaedic), pharmacists, physiotherapists, psychologists, radiographers, speech and language therapist and medical scientists
Associate professionals	<ul style="list-style-type: none"> ▪ Lab technicians, pharmacy technicians
Personal services	<ul style="list-style-type: none"> ▪ Care workers

DTF: 12% of all difficult to fill mentions in October 2015, primarily for professional roles:

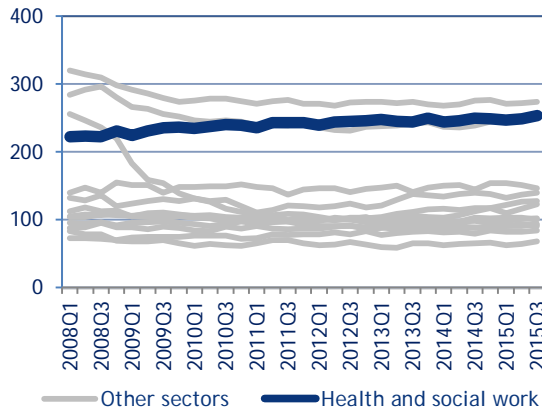
- Medical doctors: locum/NCHD doctors and registrars/SHO in general and emergency medicine, anaesthetists, and paediatrics; doctors for GP practices
- Radiographers (clinical specialists; MRI and CT radiographers)
- Nurses - advanced nursing practitioners (intensive care, operating theatre, oncology, cardiovascular care); general nurses, especially for older people care; intellectual disability nurses
- Specialised medical technicians - cardiac technicians
- Care workers.

Conclusions: although this sector is not experiencing significant growth (due primarily to budgetary restrictions), replacement demand alone is contributing to a high level of job openings; employment permit data indicates difficulties sourcing sufficient skilled staff particularly in relation to doctors and nurses, while other indicators point to issues with retention, particularly regarding care workers.



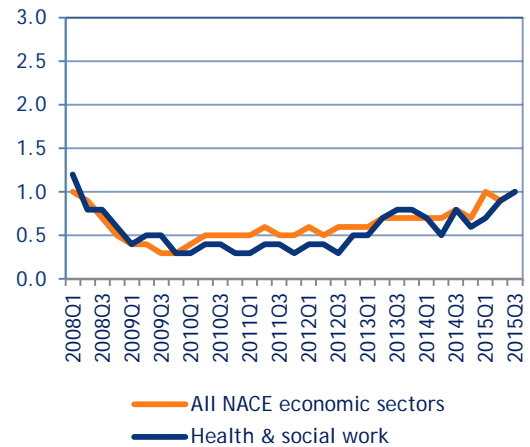
Key trends in the health and social work sector

Figure 10.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



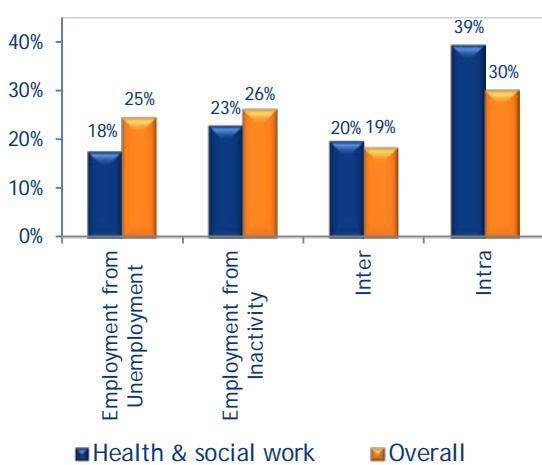
Source: SLMRU analysis of CSO QNHS

Figure 10.2: CSO Job Vacancies Rates, 2008-2015



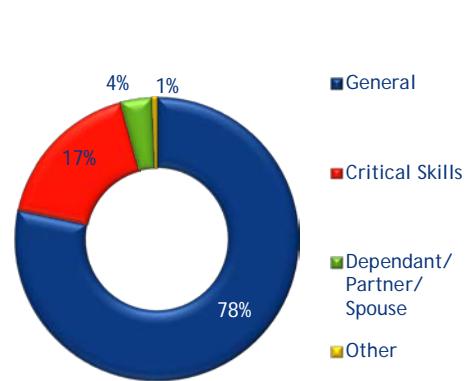
Source: SLMRU analysis of CSO EHECS data

Figure 10.3: Transitions, 2014



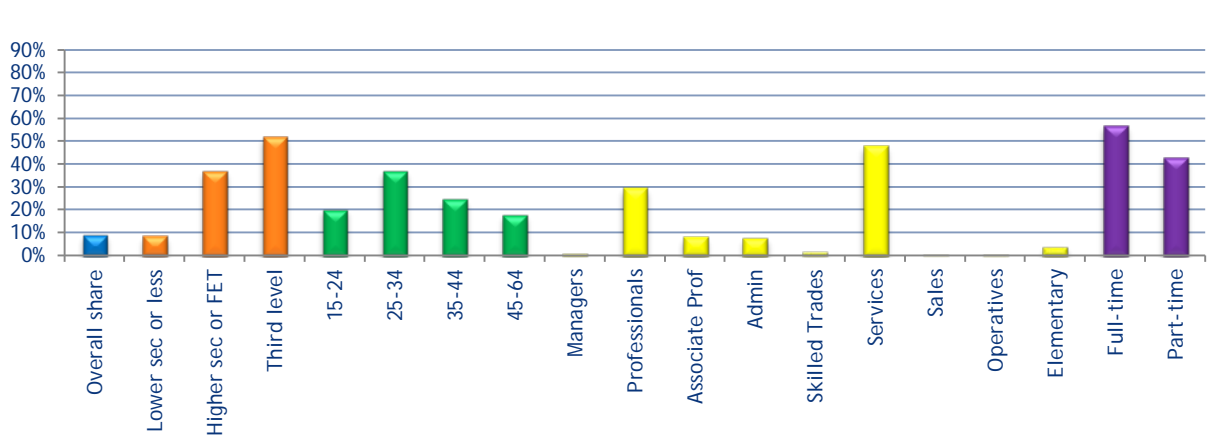
Source: CSO QNHS

Figure 10.4: Employment permits by type, 2015



Source: DJEI

Figure 10.5: Recent hires, 2015



Source: CSO QNHS



11. Professional, scientific and technical activities

Employment change: this sector saw employment increase by 5%, or 5,700 persons, in the year since quarter 3 2014. (Figure 11.1)

Vacancy rates: at 2.1%, this sector recorded the third highest vacancy rate in quarter 3 2015; there have been clear signs of growth in recent quarters. (Figure 11.2)

Transitions: this sector accounted for 6% of all transitions in 2014, with the highest shares for those transitioning within the sector (37%) or between sectors (25%); it had a lower than average share of persons transitioning into this sector from unemployment or inactivity. (Figure 11.3)

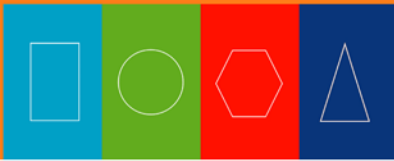
Recent job hires: the number of recent job hires has been increasing in recent years with 19,600 recorded in 2015 (Figure 11.4):

- almost three quarters (71%) of recent hires in this sector held third level qualifications
- most were in the younger age cohorts, primarily 15-34 (combined accounting for 64%)
- most recent hires were in professional (43%), associate professional (21%) and administrative (15%) roles
- at 81%, most were in full-time positions.

Employment permits: in 2015, 1% of all new employment permits were issued for this sector, across a variety of professional roles.

IrishJobs.ie: at 37%, this sector accounted for the highest share of vacancies reported through IrishJobs.ie in 2015 and indeed over the previous five years. The number of vacancies reported has been increasing steadily since 2013 with most vacancies for professionals, associate professionals and, to a lesser extent, administrative roles. The largest growth in recent years relates to vacancies for professional occupations which accounted for over a third of all vacancies in this group in 2015.

Managers	<ul style="list-style-type: none"> ▪ Operations and manufacturing
Professionals	<ul style="list-style-type: none"> ▪ Engineering - primarily process engineers but also project, design, structural and R&D ▪ Business - accountants (mainly financial but also management), project managers, business/risk analysts ▪ IT - engineers (validation, software, systems) ▪ Quality roles - quality assurance engineers, regulatory affairs, compliance
Associate professionals	<ul style="list-style-type: none"> ▪ Financial - financial analyst/controller, tax managers, audit manager, accounts manager, credit and collections agent, data analyst, FP&A (financial planning and analysis) analysts, AR analysts (accounts receivable)



	<ul style="list-style-type: none"> HR generalists, advisors, recruitment coordinators and health and safety officers Sales and marketing - product/brand management, business development, supply chain analyst, sales managers Technicians - laboratory, engineering (commissioning & qualification, manufacturing, mechanical), quality assurance, field service technician
Administrative	<ul style="list-style-type: none"> Financial - fund accountants, accounts payable/receivable, payroll, credit controller, administrator (financial, pensions etc.) General admin (document controller, billing, HR)
Skilled trades	<ul style="list-style-type: none"> Validation and C&Q (commissioning & qualification) engineer
Operatives	<ul style="list-style-type: none"> Automation engineer

DSP Jobs Ireland: this sector accounted for 4% of all vacancies in 2015 primarily in associate professional roles; the 39% growth on the previous year relates to marketing associate professionals, although these vacancies originated almost entirely from one company.

Associate professionals	<ul style="list-style-type: none"> Sales and marketing (brand ambassadors/promotional staff, sales executives) Interpreters, recruitment consultants, CAD technicians, graphic designers
Professionals	<ul style="list-style-type: none"> Accountants (mainly financial but also management), civil/site engineers, quantity surveyors
Administrative	<ul style="list-style-type: none"> Accounts technician, payroll administrator, credit controller, bookkeeper

DTF: 3% of all difficult to fill mentions in October 2015:

- accountants - in corporate finance (audit, financial restructuring, and solvency), taxation and regulatory compliance (e.g. BEPS)
- experienced regulatory and compliance professionals.

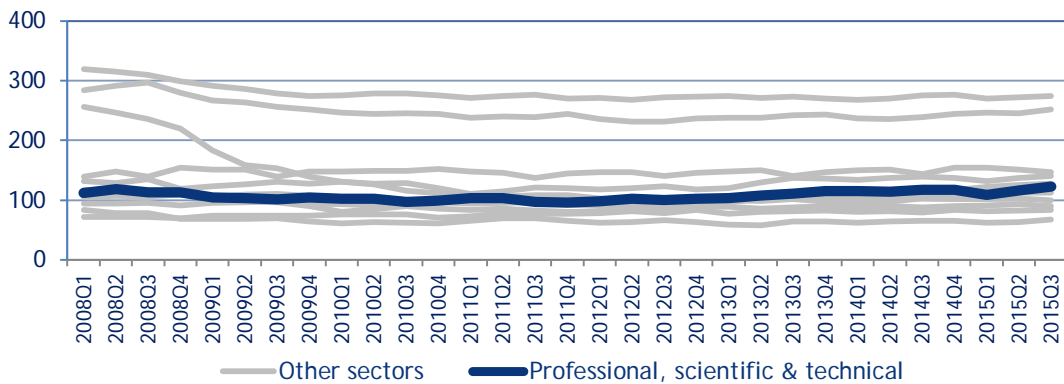
Job announcements: after ICT, this sector had the second highest share of jobs mentioned in the media. Jobs announced spanned a number of areas including business process management (e.g. management consultants, project manager), legal services (solicitors and legal assistants), accountants, marketing, and recruitment.

Conclusions: many of the indicators point to a sector experiencing growth with opportunities in high skilled roles; the transitions data, however, indicates that a share of the job openings relates to churn rather than expansion; difficulty in sourcing suitably qualified persons for this sector has been identified in a small number of niche areas.



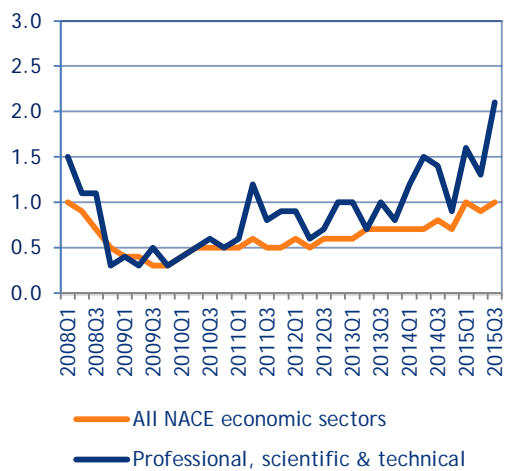
Key trends in the professional, scientific and technical activities sector

Figure 11.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



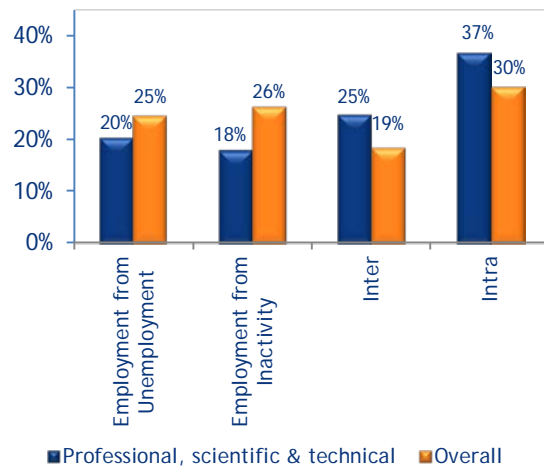
Source: CSO QNHS

Figure 11.2: CSO Job Vacancies Rates, 2008-2015



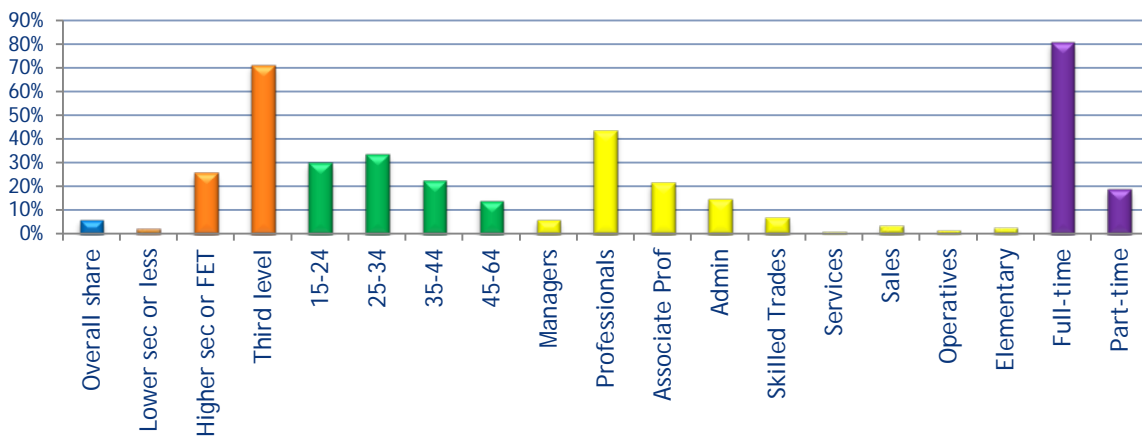
Source: SLMRU analysis of CSO EHECS data

Figure 11.3: Transitions, 2014



Source: CSO QNHS

Figure 11.4: Recent hires, 2015



Source: CSO QNHS



12. Administrative and support services

Employment change: employment in this sector grew by 4% in the year since quarter 3 2014 resulting in an additional 2,800 persons. (Figure 12.1)

Vacancy rates: the vacancy rate has been consistently higher than or equal to the average for all NACE sectors since 2012, standing at 1.2% in quarter 3 2015. (Figure 12.2)

Transitions: this sector accounted for 4% of all transitions in 2014, with a high share (31%) entering employment in this sector from unemployment, compared to a 25% share for all sectors. (Figure 12.3)

Recent job hires: at 15,300 recent job hires, this sector accounted for 5% of all new hires broken down as follows (Figure 12.4):

- most new hires were for persons who held either higher secondary/FET (45%) or third level qualifications (37%)
- over a third (35%) were aged 25-34
- elementary positions accounted for over a third (36%) of new hires (e.g. cleaners, security guards) with the remainder spread across all other occupational groups
- almost two thirds of new hires (62%) were for full-time positions.

DSP Jobs Ireland: this sector accounted for 17% of all vacancies notified in 2015. The large jump since 2014 relates to the advertisement of enumerators for Census 2016; if these vacancies are excluded, any increases in notifications related to cleaning and security positions (primarily notified through recruitment agencies, thus masking the number of actual open posts).

Administrative	▪ Apart from census related openings, administrator (office, accounts, sales), receptionist
Sales	▪ Telesales, contact/call centre representatives, lead generation representatives (language skills required for all of these)
Security guards*	▪ Retail security guards were the most frequently mentioned but also door supervisors, event and static security
Cleaning	▪ Primarily part-time positions advertised, over half were based in Dublin, with some experience a requirement for over half of the vacancies.

* Security guards: half of the jobs advertised were for part-time positions, with a varying level of experience required (a third for each none, some and full); many vacancies were advertised through recruitment agencies.

IrishJobs.ie: 8% of all vacancies notified in 2015 were for this sector, mainly in the areas of customer service and call centres. The number of jobs advertised has remained relatively steady in recent years. At 49% in 2015, this sector accounted for the highest share of advertised vacancies that indicate a requirement for a foreign language, primarily in German and French, but also Italian,



Spanish, Dutch, Turkish and Russian. Most vacancies in this sector were for administrative, sales and associate professional roles.

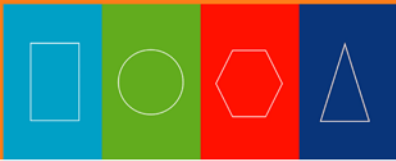
Associate Professionals	▪ Customer/technical support (with languages)
Administrative	▪ General administrator, receptionists, executive assistants
Sales	▪ Customer service/care/representative (with languages)

DTF: 7% of all difficult to fill vacancies in October 2015, primarily for administrative roles:

- Call centre, customer support, telesales and CRM roles requiring European languages (Nordic, Dutch and German) and relevant product knowledge
- Accounts clerks
- Office administration/secretarial roles.

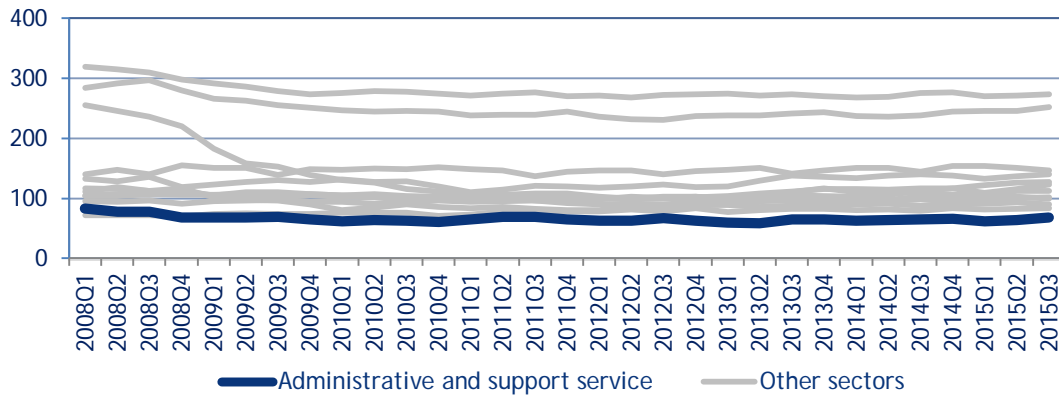
Job announcements: contact centre roles accounted for a significant share of all jobs announced; the vast majority of positions were for sales/customer care and technical support, mostly in IT, but with some also in the utilities sector (e.g. energy sales); on average, job announcements for contact centres were for approximately 200 positions, to come on stream over the next two to three years.

Conclusions: the main area of demand in this sector relates to contact centre roles with language skills; the low employment growth in this sector would indicate that churn is a larger factor than expansion; there is also evidence of cleaning and security guard roles appearing frequently in the vacancy data, although this is thought to be primarily related to a high level of turnover for these positions.



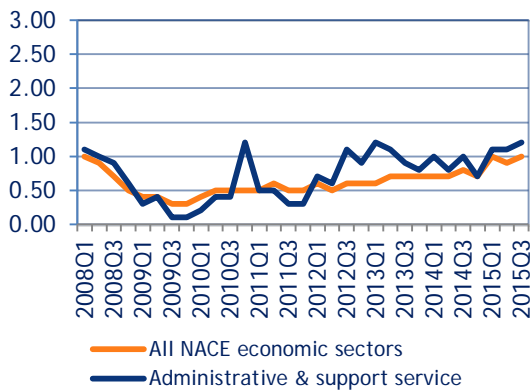
Key trends in the administrative and support services sector

Figure 12.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



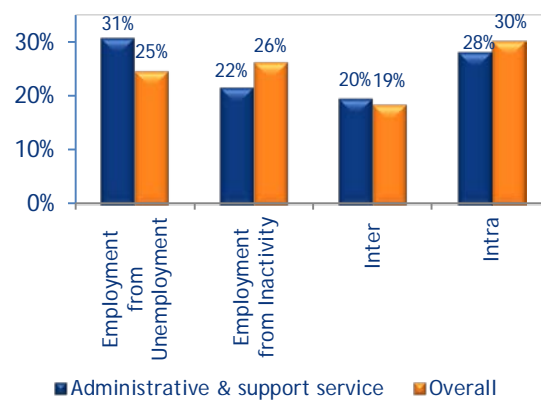
Source: CSO QNHS

Figure 12.2: CSO Job Vacancies Rates, 2008-2015



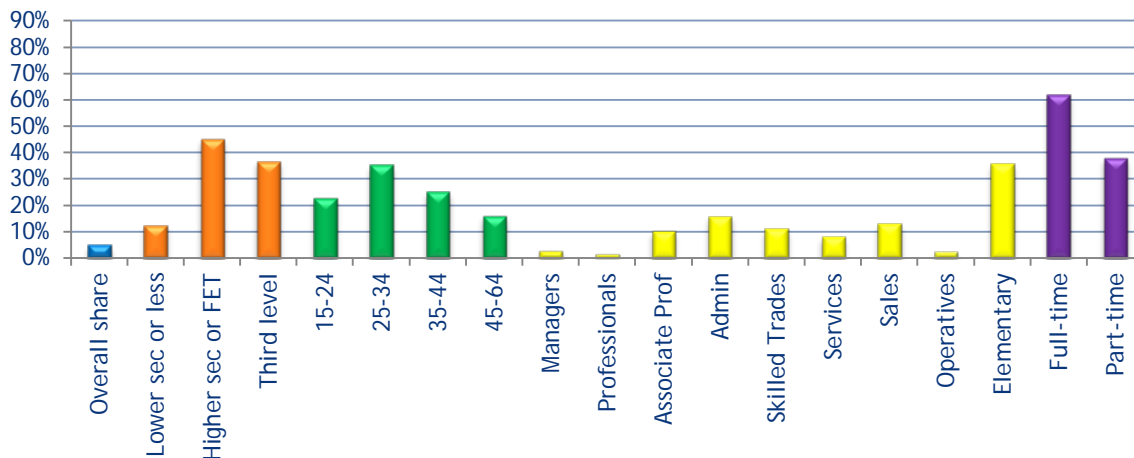
Source: SLMRU analysis of CSO EHECS data

Figure 12.3: Transitions, 2014

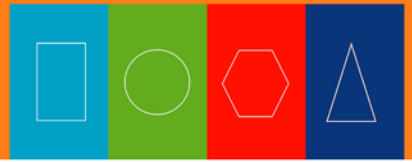


Source: CSO QNHS

Figure 12.4: Recent hires, 2015



Source: CSO QNHS



13. Transportation and storage

Employment change: there was a 3% growth in employment in the year since quarter 3 2014, representing an additional 2,500 persons employed in the sector. (Figure 13.1)

Vacancy rates: despite rates showing signs of growth since the middle of 2013, they have been in decline since the fourth quarter of 2014. (Figure 13.2)

Transitions: this sector accounted for 3% of all transitions in 2014, almost equally divided between those transitioning from the various methods. (Figure 13.3)

Recent job hires: there were approximately 10,900 new job hires reported in 2015, representing 3% of all recent hires (Figure 13.4),

- almost a half (47%) of new hires held higher secondary or FET education
- a large share (36%) were aged 45-64
- operatives accounted for almost a half (47%) of new hires e.g. large goods vehicle drivers
- 71% of the new hires were for full-time positions.

Employment permits: in 2015, less than 1% of all new employment permits were issued for this sector.

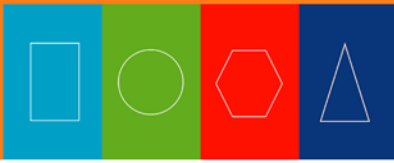
DSP Jobs Ireland: this sector accounted for 6% of all vacancies advertised through DSP Jobs Ireland in 2015; almost all positions were for operatives and elementary occupations.

Large goods vehicle drivers	<ul style="list-style-type: none"> ▪ artic, HGV, rigid, multidrop
Other drivers	<ul style="list-style-type: none"> ▪ delivery, van, bus and coach drivers
Elementary storage	<ul style="list-style-type: none"> ▪ warehouse operatives, general operative, order picker, stock-takers (with some of these positions in retail)
Air transport	<ul style="list-style-type: none"> ▪ cabin crew and ramp agents

IrishJobs.ie vacancies: this sector accounted for 1% of all vacancies notified, primarily for operative roles: drivers (artic, multi-drop, HGV), air freight coordinator/specialist, warehouse operatives.

DTF: 1% of all difficult to fill mentions in October 2015, primarily for operative roles

- DTF mentions were limited to HGV drivers (with E+, CI licence) and motor mechanics (limited to niche areas such as HGV mechanics).



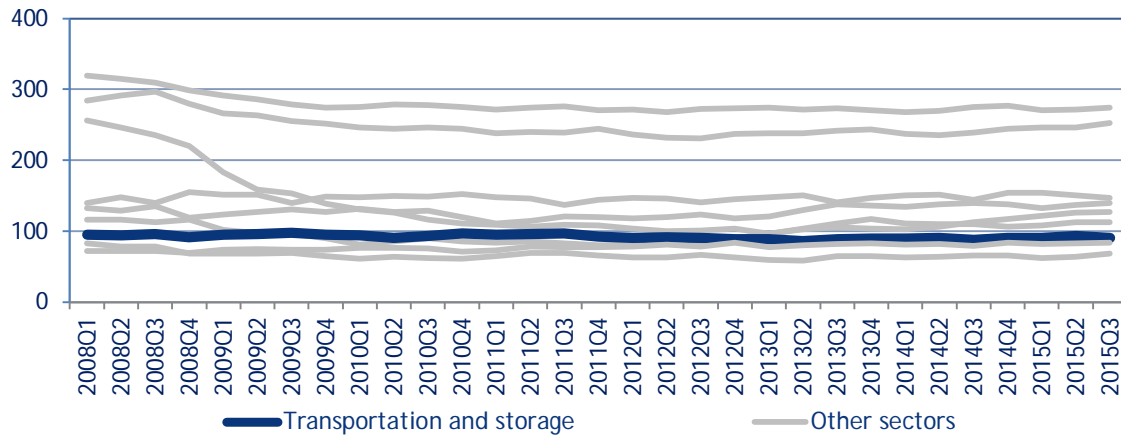
Job announcements: jobs announced in the media were associated primarily with passenger transport (e.g. pilots, bus drivers, and taxi drivers); there were also support roles announced, including sales, customer service and IT for transport and distribution related activities.

Conclusions: this is a sector which is not registering significant activity, either growth or turnover, although difficulty in sourcing HGV drivers and mechanics was identified.



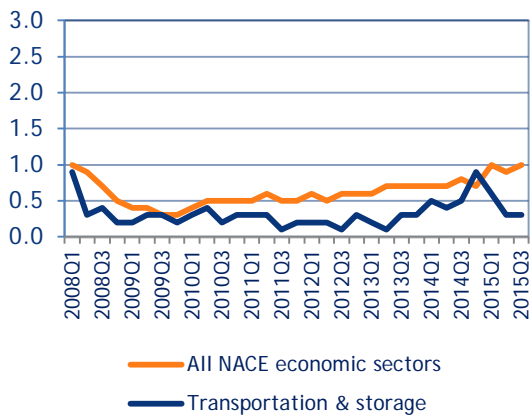
Key trends in the transportation and storage sector

Figure 13.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



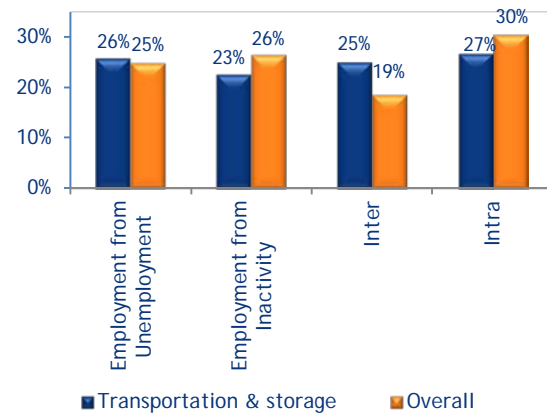
Source: SLMRU analysis of CSO QNHS

Figure 13.2: CSO Job Vacancies Rates, 2008-2015



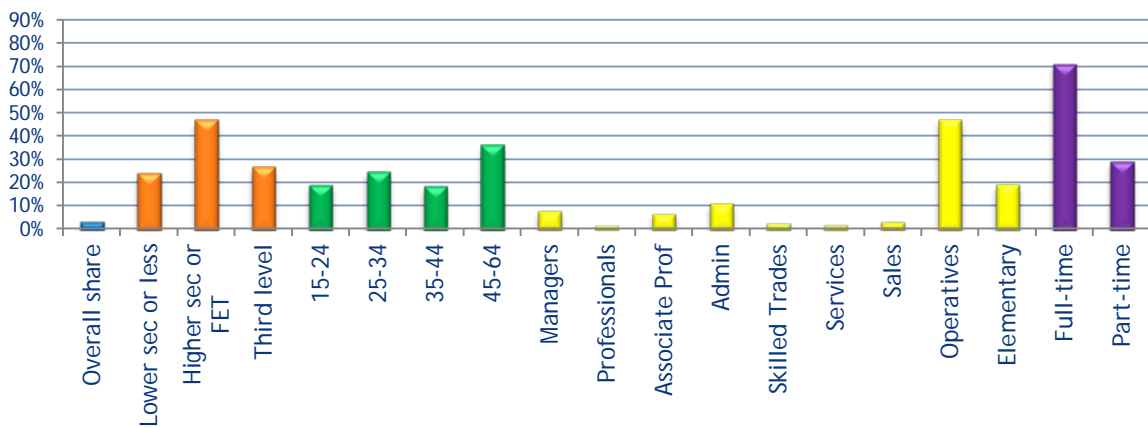
Source: SLMRU analysis of CSO EHECS data

Figure 13.3: Transitions, 2014

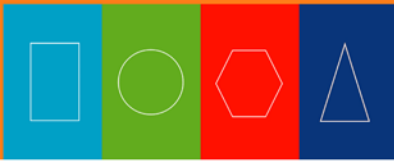


Source: CSO QNHS

Figure 13.4: Recent hires, 2015



Source: CSO QNHS



14. Public administration and defence

Employment change: there was a 3% increase in employment in the year since quarter 3 2014, representing an additional 3,200 persons. (Figure 14.1)

Vacancy rates: for most of the period examined, the vacancy rate for this sector was below the rate for all sectors, most likely related to the cap on hiring during the recession, although 2015 has seen some signs of growth. (Figure 14.2)

Transitions: there were very few transitions in this sector (2% in 2014). (Figure 14.3)

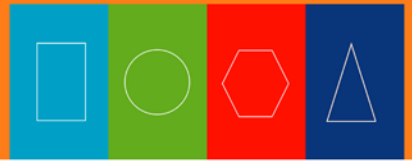
Recent job hires: a small number of job hires have been reported in this sector - primarily for persons with third level qualifications and in associate professional/administrative roles.

DSP Jobs Ireland - there were no notifications for this sector.

IrishJobs.ie - this sector accounted for 1% of notifications in 2015 primarily for professionals (researchers, medical specialists) and associate professionals (HR officers, lab technicians).

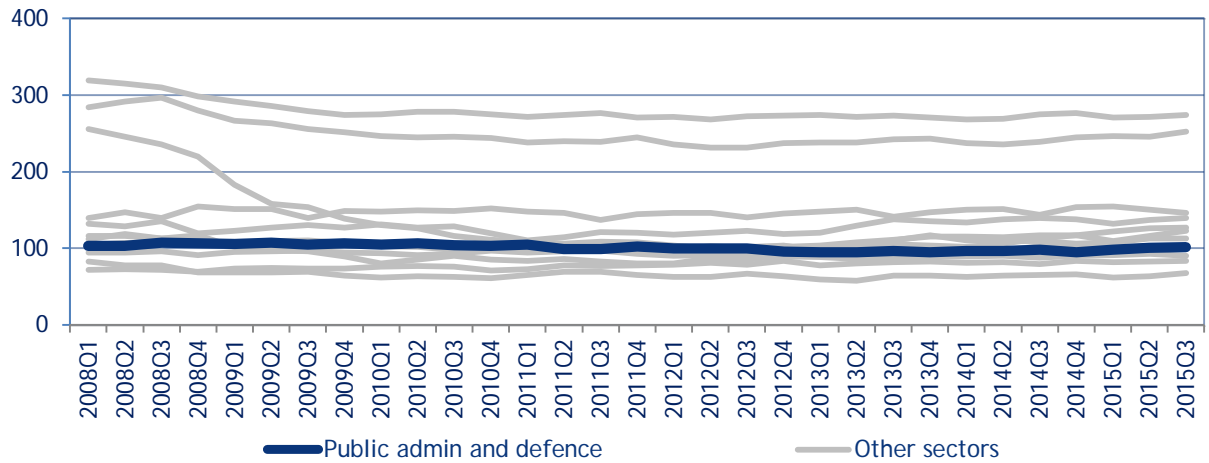
Job announcements: relatively, these jobs accounted for a smaller proportion of all those made, but jobs announced in the media in 2015 included positions with the defence forces (Gardaí, Air Corps), mostly at professional (engineer) and associate professional level (technologist, aircraft technician).

Conclusions: a limited amount of opportunities as this sector is particularly influenced by government policy and budgetary restrictions.



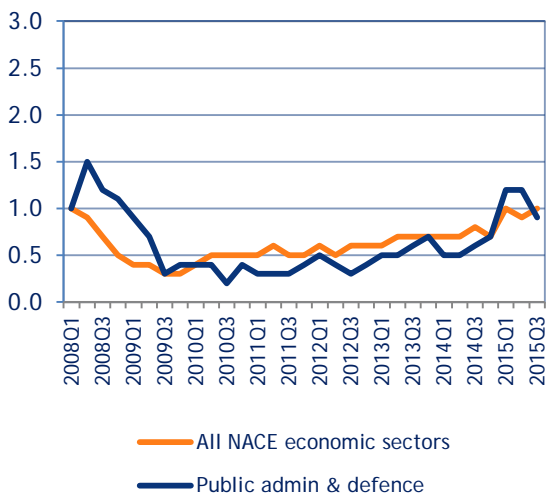
Key trends in the public administration and defence sector

Figure 14.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



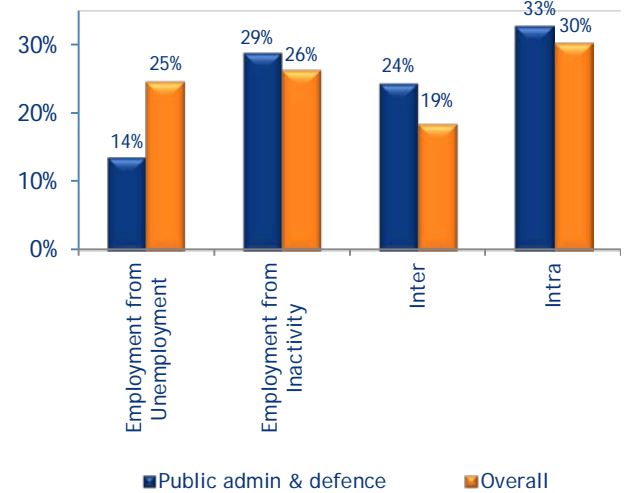
Source: SLMRU analysis of CSO QNHS

Figure 14.2: CSO Job Vacancies Rates, 2008-2015

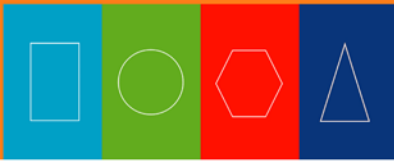


Source: SLMRU analysis of CSO EHECS data

Figure 14.3: Transitions, 2014



Source: CSO QNHS



15. Education

Employment change: there was a 2% increase in employment in the year since quarter 3 2014, representing an additional 2,500 persons. (Figure 15.1)

Vacancy rates: the rate for this sector was consistently below the rate for all NACE sectors over the period examined, most likely related to economic and budgetary restraints. (Figure 15.2)

Transitions: in 2014, this sector accounted for 6% of all transitions, with a higher share than average entering employment from inactivity (33% compared to an overall share of 26%) indicating difficulty in gaining long term contracts. (Figure 15.3)

Recent job hires: amounted to 17,700 in 2015:

- three quarters of new hires held third level education
- most were aged 25-44 (combined they totalled 61%)
- professional occupations (e.g. primary and secondary teachers) accounted for almost two thirds (61%) of new hires
- almost two thirds (62%) were for full-time positions.

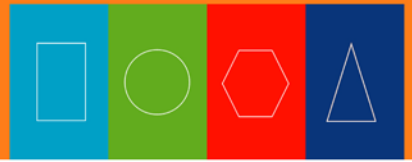
Employment permits: this sector accounted for 1% of all new permits issued in 2015, most of which were for professional roles (e.g. lecturers, researchers).

DSP Jobs Ireland - 4% of notifications in 2015; one company accounted for over a quarter of all vacancies notified in this sector, almost all of which were for part-time positions. The main occupations included:

- Tutors (e.g. in healthcare, horticulture, childcare)
- Childcare workers (primarily advertised through recruitment agencies).

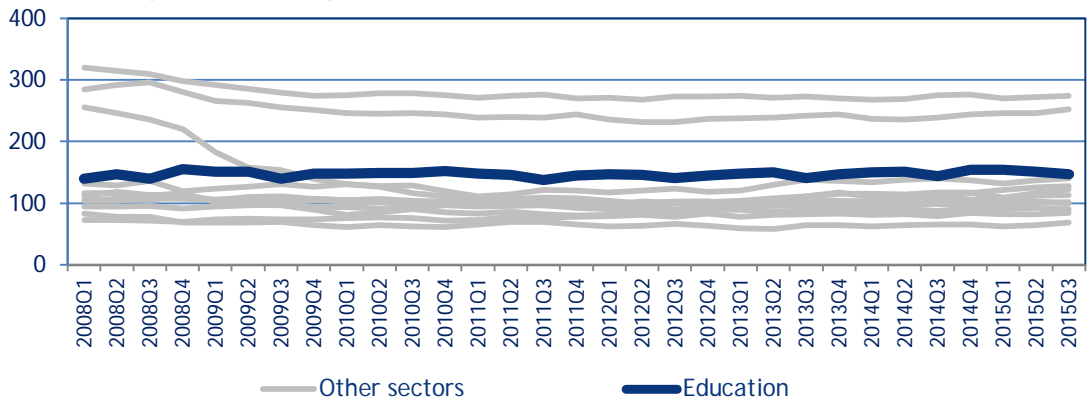
IrishJobs.ie - this sector accounted for 1.5% of notifications primarily for professionals (lecturers, course tutors, researchers) and associate professionals (instructors, training managers, assistant lecturers) along with childcare workers.

Conclusions: this sector has been experiencing slow growth, with most opportunities occurring due to replacement demand.



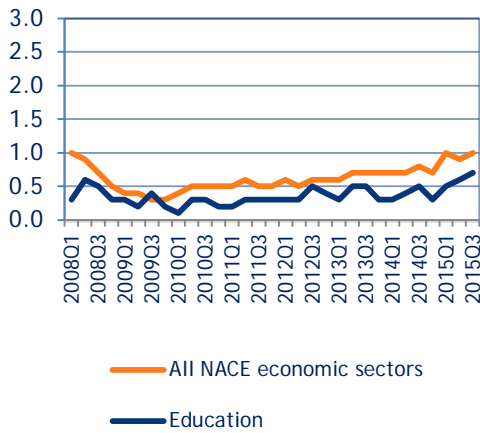
Key trends in the education sector

Figure 15.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



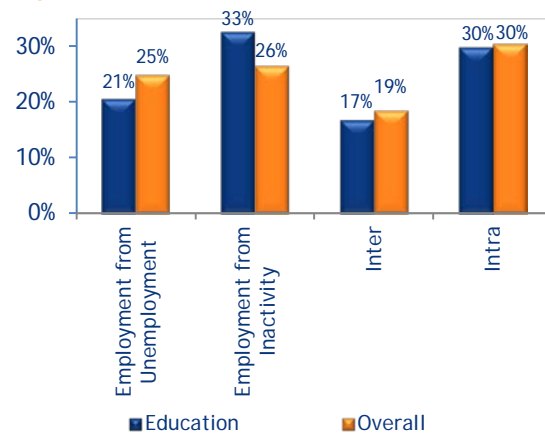
Source: SLMRU analysis of CSO QNHS

Figure 15.2: CSO Job Vacancies Rates, 2008-2015



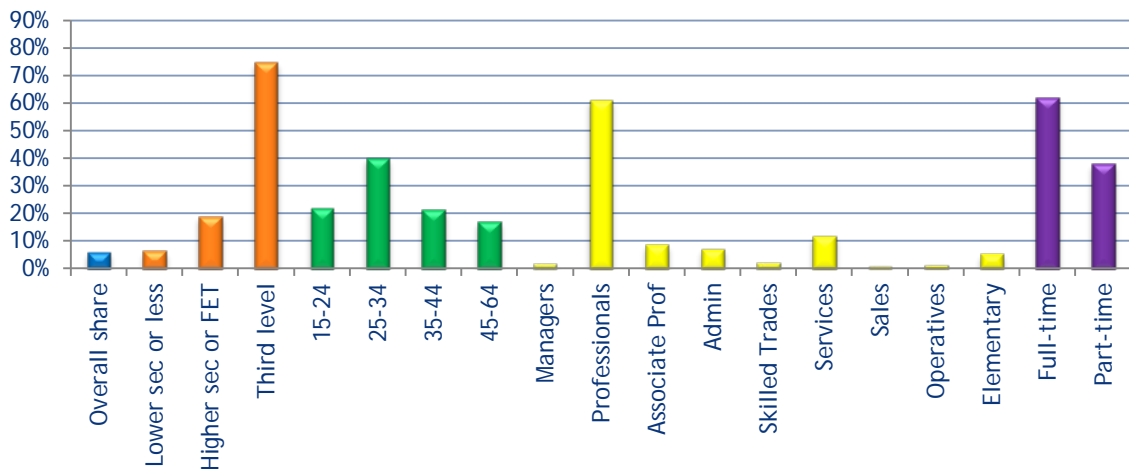
Source: SLMRU analysis of CSO EHECS data

Figure 15.3: Transitions, 2014

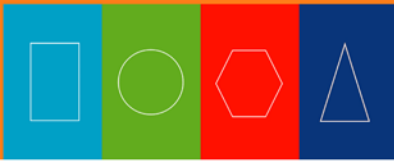


Source: CSO QNHS

Figure 15.4: Recent hires in education, 2015



Source: CSO QNHS



16. Arts, entertainment & other service

Employment change: there was a 5% increase in employment since quarter 3 2014, in areas such as leisure/sports managers, sports coaches, representing an additional 4,300 persons. (Figure 16.1)

Vacancy rates: fluctuated over the period examined but broadly in line with the rate for all NACE sectors. (Figure 16.2)

Transitions: this sector accounted for 3% of all transitions in 2014, with a high share (59%) entering employment in this sector from either unemployment or inactivity. (Figure 16.3)

Recent job hires: 15,300 new hires occurred for this sector in 2015 (Figure 16.4):

- most held higher secondary or FET education (42%) or third level qualifications (39%)
- three quarters were aged under 35
- over a third were employed in personal services (e.g. hairdressers, barbers)
- just over a half (54%) were employed in part-time positions.

Employment permits: this sector accounted for 5% of all new employment permits issued in 2015

- 44% were for critical skills permits, with a further 21% for general employment permits
- 42% of new permits issued were for professional occupations including software engineers⁶ and business analysts with a further 34% for associate professionals in sales (account managers, marketing), sports players and coaches.

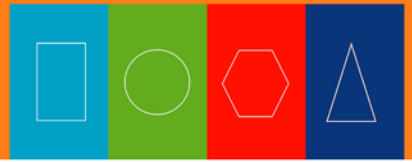
DSP Jobs Ireland - 2% of notifications in 2015 in occupations including:

- hairdressers/barbers
- beauty therapist, nail technician
- fitness instructor, leisure centre attendant.

IrishJobs.ie - 1% of notifications in 2015 primarily in associate professional roles (graphic designers) along with media and sports-related roles.

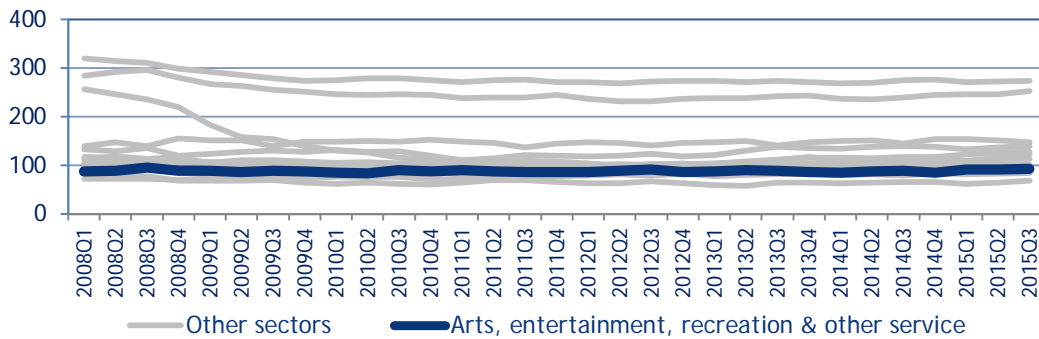
Conclusions: relatively few vacancies have been notified for positions within this sector, with most opportunities occurring for personal services occupations.

⁶ This sector includes the repair of computers and personal and household goods.



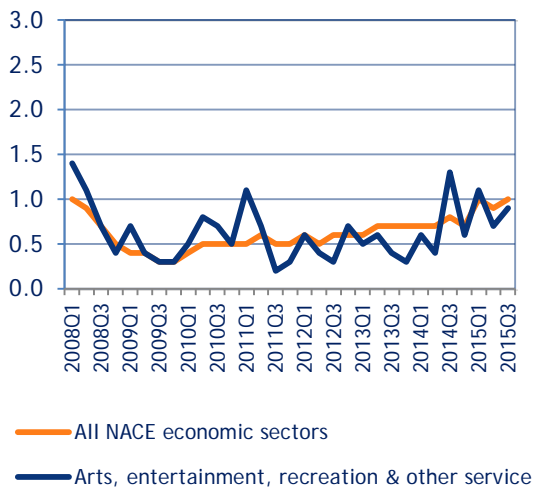
Key trends in the arts, entertainment and other services sector

Figure 16.1: Employment (000s) by sector, quarter 1 2008-quarter 3 2015



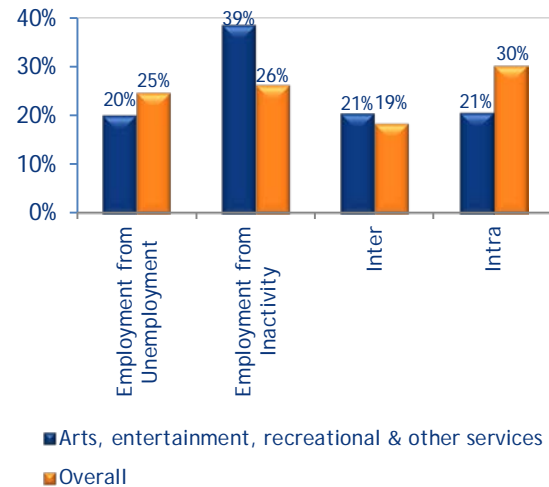
Source: CSO QNHS

Figure 16.2: CSO Job Vacancies Rates, 2008-2015



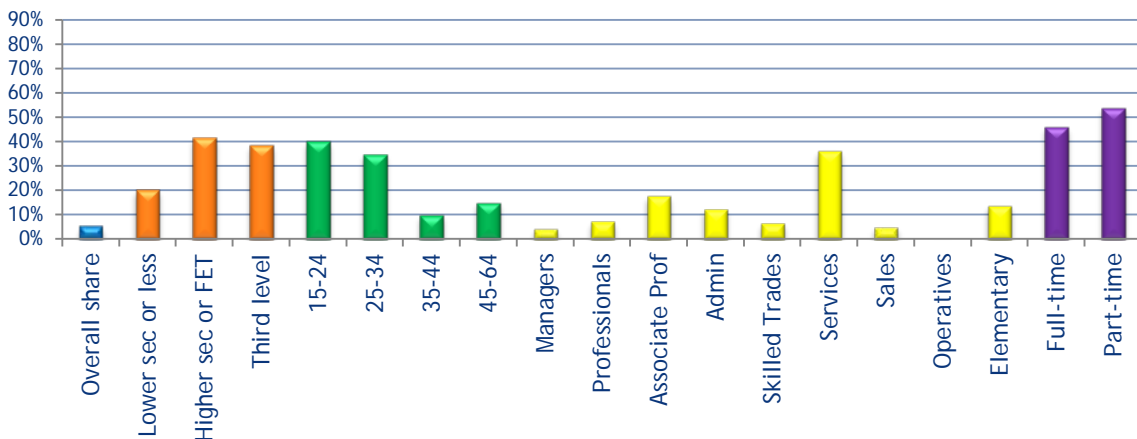
Source: SLMRU analysis of CSO EHECS data

Figure 16.3: Transitions, 2014

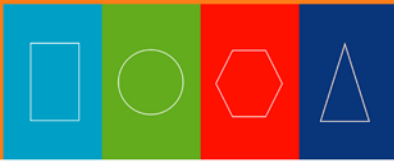


Source: CSO QNHS

Figure 16.4: Recent hires, 2015



Source: CSO QNHS

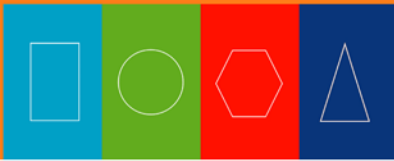


Appendix A. NACE Classification of Sectors

Industry
Mining and quarrying
Manufacture of food products
Manufacture of beverages
Manufacture of wearing apparel
Manufacture of wood and of products of wood and cork, except furniture; manufacture of articles of straw and plaiting materials
Printing and reproduction of recorded media
Manufacture of chemicals and chemical products
Manufacture of basic pharmaceutical products and pharmaceutical preparations
Manufacture of rubber and plastic products
Manufacture of other non-metallic mineral products
Manufacture of basic metals
Manufacture of fabricated metal products, except machinery and equipment
Manufacture of computer, electronic and optical products
Manufacture of machinery and equipment n.e.c.
Manufacture of motor vehicles, trailers and semi-trailers
Manufacture of furniture
Other manufacturing
Repair and installation of machinery and equipment
Electricity, gas, steam and air conditioning supply
Waste collection, treatment and disposal activities; materials recovery
Construction
Development of building projects
Civil engineering
Specialised construction activities
Wholesale and retail trade
Wholesale and retail trade and repair of motor vehicles and motorcycles
Wholesale trade, except of motor vehicles and motorcycles
Retail trade, except of motor vehicles and motorcycles
Transportation and storage
Land transport and transport via pipelines
Water transport
Air transport
Warehousing and support activities for transportation
Postal and courier activities
Accommodation and food service
Accommodation
Food and beverage service activities



Information and communications
Publishing activities
Motion picture, video and television programme production, sound recording and music publishing activities
Programming and broadcasting activities
Telecommunications
Computer programming, consultancy and related activities
Information service activities
Financial, insurance and real estate
Financial service activities, except insurance and pension funding
Insurance, reinsurance and pension funding, except compulsory social security
Activities auxiliary to financial services and insurance activities
Real estate activities
Professional, scientific and technical activities
Legal and accounting activities
Activities of head offices; management consultancy activities
Architectural and engineering activities; technical testing and analysis
Scientific research and development
Advertising and market research
Other professional, scientific and technical activities
Veterinary activities
Administrative and support services
Rental and leasing activities
Employment activities
Travel agency, tour operator reservation service and related activities
Security and investigation activities
Services to buildings and landscape activities
Office administrative, office support and other business support activities
Public admin and defence
Education
Health and social work
Human health activities
Residential care activities
Social work activities without accommodation



Appendix B. Earnings, Hours and Employment Costs Survey Methodology

Each quarter the Earnings, Hours and Employment Costs Survey (EHECS) undertakes an examination of all enterprises with 50 or more employees; a further stratified sample by sector is used for enterprises with less than 50 employees, with the following proportions by size class for all sectors:

Size Class	3-9 employees	10-19 employees	20-49 employees
Sampling Fraction	4%	7%	33%

The overall sample is in excess of 6,900 enterprises which represents approximately 9% of all enterprises and accounts for approximately 66% of all employees across NACE sectors B-S⁷.

The distribution of persons employed by sector is detailed below.

No of persons engaged, 2012

	Under 10	10 - 19	20 - 49	50+
Industry	11%	6%	11%	71%
Construction	69%	10%	10%	11%
Wholesale and retail trade	27%	14%	15%	44%
Transportation and storage	24%	9%	9%	58%
Accommodation & food service	26%	14%	19%	40%
Information & communication	20%	7%	13%	60%
Financial, insurance & real estate	20%	5%	6%	69%
Professional, scientific & technical	47%	12%	11%	30%
Administrative and support service	17%	6%	10%	67%

Source: CSO Business Demography, 2012

⁷ Excludes agriculture, forestry and fishing along with activities of households as employers and of extraterritorial organisations and bodies



Appendix C. Recruitment Agency Survey October 2015 - Detailed results

Industry

Managers	<ul style="list-style-type: none"> production planning managers in high tech manufacturing (mostly in biopharma) supply chain managers, especially with inventory control/planning/ERP skills, APICS, and IIPMM
Engineers	<ul style="list-style-type: none"> production and process engineers, automation & system control (e.g. process optimisation utilising software control systems, lean manufacturing), control and instrumentation engineers and process safety engineers design and development engineers - especially for medical devices sector and associated R&D activities quality control and assurance (including standards and regulatory compliance), validation (e.g. Six-Sigma Black-Belt, CQE certification - Statistical Engineering) and commissioning CQV engineer roles chemical engineers (production process & supply chain planning and integration for roles in biotech/pharmaceutical industry)
Scientists	<ul style="list-style-type: none"> chemical and biological scientist, research and design scientists analytical scientists and quality control analysts, mostly for roles in biopharma and MedTech scientists for niche areas (pharmacovigilance scientists - legislation and processes specialists), food scientists, validation & process scientists
Supply chain professionals	<ul style="list-style-type: none"> specialist roles, including supply chain analysts and forecasting professionals, usually requiring both technical (e.g. e-Sourcing solutions, SAP, inventory control with ERP systems) and business skills and relevant professional/industry certification (e.g. APICS) supply chain administrative roles for supporting supply chain activities, e.g. EDI/SAP administration with languages, freight forwarding etc.
Accountants	<ul style="list-style-type: none"> industry experts (specific ERP System & Reporting Tools including Oracle) and business and financial management accountants (including interaction of financial management with IT systems e.g. Oracle Financials Applications; ORACLE/ERP migration to SAP)
Technicians	<ul style="list-style-type: none"> especially biotech technicians (e.g. computerised processes, SOPs/EWI and GMP Engineering systems technicians, and 'cleanroom' technicians) and extrusion technicians, usually for MedTech/medical devices segment
Skilled trades	<ul style="list-style-type: none"> limited to TIG/MIG (Tungsten/Metal Inert Gas) and ARC welding
Sales executives	<ul style="list-style-type: none"> niche roles - technical sales representatives for the pharmaceutical and medical device industries
Operatives	<ul style="list-style-type: none"> CNC and SMT/PTH Rework operators

Wholesale and retail

<ul style="list-style-type: none"> Limited to highly specialised roles in sales and marketing and in procurement/management of purchasing operations in retail (e.g. marketing managers - product strategy development and management)
<ul style="list-style-type: none"> Fork lift operators/drivers (niche areas - VNA/turret/Reach truck)

Construction

Project managers	<ul style="list-style-type: none"> niche areas, with specific skill set and relevant experience
Quantity Surveyors	



BIM	<ul style="list-style-type: none"> ▪ building information modelling, CAD
Skilled trades	<ul style="list-style-type: none"> ▪ steel fixers, pipe layers, shuttering carpenters, and electricians with specific skills, e.g. electrical maintenance, computer based industrial control systems PLC & SCADA programming and fault-finding, microgeneration and solar photovoltaic systems
Operatives	<ul style="list-style-type: none"> ▪ tower crane operator / banksman, site dumper truck drivers

Accommodation and food

<ul style="list-style-type: none"> ▪ Chefs
<ul style="list-style-type: none"> ▪ Waiting / bar staff
<ul style="list-style-type: none"> ▪ Receptionists (hotel accommodation)
<ul style="list-style-type: none"> ▪ Sales & marketing roles (e.g. sales director)
<ul style="list-style-type: none"> ▪ Management (e.g. hotel revenue manager, hotel operations manager)
<ul style="list-style-type: none"> ▪ Beauty therapist (with ITEC, CIBTAC, CIDESCO qualifications)

Information and communication

IT specialist managers	<ul style="list-style-type: none"> ▪ project managers ▪ digital marketing (e.g. customer acquisition & engagement via SEO/SEM, email marketing, social media)
Programmers and software designers and developers	<ul style="list-style-type: none"> ▪ web applications (e.g. Java, Summit, JavaScript and CSS); object oriented AD client computing (JSP, Ruby on Rails, FLEX, and PHP); web development, design and publishing (e.g. CSS, HTML), Front End/User online experience (UX) and user interaction (UI) related applications (e.g. JSP, AJAX, Jscript, HTML), .Net MVC Developer (ASP skills complemented by HTML, CSS, JavaScript, JQuery) ▪ systems QA - IT system testing of performance & reliability (with demand for both senior and middle ranking posts) especially for commercial software applications) ▪ distributed computing architecture, interoperability, workflow-enabled applications, (.NET Framework / Sharepoint) and interdependence DevOps (Agile) ▪ database (DB) / Data Warehouse architecture - DB & Data architecture for financial services / business analysis - extraction, transformation, and loading (ETL) tools (e.g. ORACLE ETL Design / Tools, SQL, MSSQL; PL/SQL developers, Data migration and management) ▪ data analyst/business intelligence roles - (BI solutions, Oracle OBIEE, ODI, ETL Design), Big data analysts (e.g. Hadoop & MapReduce), Micro Strategy Specialist (e.g. Websphere); demand remains strong for analysts with programming, modelling, and DB skills for big data and real-time web applications (e.g. SQL, Hadoop, NoSQL, Cassandra, Storm, Node.js, R); ORACLE apps (Oracle Process Manufacturing Modules, Oracle EBS SQL loader, etc.) ▪ IT and Business resource planning (ERP with SAP, Azure, CRM), CRM developer (Microsoft Dynamics CRM, Microsoft SSIS/SSAS; IT System Accountant Analyst (SAP Business Objects and SAP BPC, ERP) ▪ IT Solutions Architect (e.g. financial software technology environment: MS.Net Technologies (Visual Studio, C#, ASP.Net), SQL Server) ▪ backend engineer - business / enterprise infrastructure software - application programming interface API (RESTful web services APIs - e.g. SOAP with JSON) ▪ network engineers - Internet / Network Protocols, Ethernet, Security) ▪ embedded software developers, primarily for telecommunications (Java C / C++ for embedded software solutions for telecoms) ▪ mobile technology applications - Apple iphone and android platforms (Objective-C and xCode for OS X and iPhone applications and Java C++ & Eclipse for Android apps development)



Technical sales	<ul style="list-style-type: none"> IT Software B2B sales, SaaS products, Salesforce.com, etc.
Technical support/ customer support	<ul style="list-style-type: none"> often with both technical and language skills for supporting multinational operations (e.g. German / French Cloud apps related support roles, SAP on demand portfolio skills); IT platforms including network and server infrastructure support roles

Financial and insurance

Fund industry	<ul style="list-style-type: none"> accounting and administration related (financial accountants, fund accounting supervisory roles (e.g. NAV, transfer agency client services, etc.), and administrative and technical support roles
Regulatory & compliance skills	<ul style="list-style-type: none"> investment protection and regulation - e.g. professionals with AIFMD (Alternative Investment Fund Managers [European] Directive)
Financial clerks	<ul style="list-style-type: none"> credit control, accounts payable and debt recovery); additional skills, a foreign language is often required for these posts
Management	<ul style="list-style-type: none"> deposit and treasury management roles credit and risk management in finance and insurance (e.g. risk analysts and actuaries)

Health and social care

Medical doctors	<ul style="list-style-type: none"> specialists (e.g. general, emergency medicine, psychiatry) and non-specialists e.g. locum/NCHD doctors and registrars/SHO in general and emergency medicine, anaesthetists, and paediatrics); doctors for GP practices
Radiographers	<ul style="list-style-type: none"> clinical specialists; MRI and CT radiographers
Nurses	<ul style="list-style-type: none"> advanced nursing practitioners (intensive care, operating theatre, oncology, cardiovascular care); general nurses, especially for older people care; intellectual disability nurses
Specialised medical technicians	<ul style="list-style-type: none"> cardiac technicians
Care workers	

Professional, technical and scientific

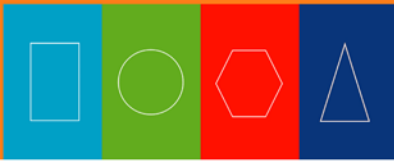
Accountants (ACCA/ACA)	<ul style="list-style-type: none"> corporate finance (audit, financial restructuring, and solvency), taxation and regulatory compliance (e.g. BEPS)
Professionals	<ul style="list-style-type: none"> Experienced regulatory and compliance professionals (with skills in, Basel, MiFID etc.)
Business analysts	<ul style="list-style-type: none"> especially business intelligence solutions and resources - e.g. Oracle OBIEE, ERP with SAP)

Administrative services

<ul style="list-style-type: none"> Call centre, customer support, telesales and CRM roles requiring European languages (Nordic, Dutch and German) and relevant product knowledge
<ul style="list-style-type: none"> Accounts clerks
<ul style="list-style-type: none"> Office administration/secretarial roles

Transport and storage

<ul style="list-style-type: none"> limited to HGV drivers (with E+, CI licence) and motor mechanics (limited to niche areas such as HGV mechanics)



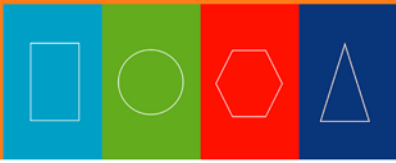
Appendix D. Members of the Expert Group on Future Skills Needs

Ms. Una Halligan	Chairperson
Mr. William Parnell	Manager, EGFSN Secretariat and Principal Officer, Department of Jobs, Enterprise and Innovation
Ms. Inez Bailey	Director, National Adult Literacy Agency
Mr. Peter Baldwin	Assistant Secretary, Department of Education and Skills
Mr. Ray Bowe	IDA Ireland
Mr. John Burke	Principal Officer, Department of Public Expenditure and Reform
Ms. Liz Carroll	Training and Development Manager, ISME
Mr. Mark Christal	Manager, Client Development, Mentoring and Skills, Enterprise Ireland
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
Mr. Paul Healy	CEO, Skillnets
Mr. Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Mr. Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Dr. Brendan Murphy	President, Cork Institute of Technology
Dr. Vivienne Patterson	Head of Skills and Engagement, Higher Education Authority
Dr. Peter Rigney	Industrial Officer, ICTU



Appendix E. Recent Expert Group on Future Skills Needs Publications

Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard+ 2016	February 2016
Assessment of Future Skills Requirements in the Hospitality Sector in Ireland, 2015-2020	November 2015
Regional Labour Markets Bulletin 2015	October 2015
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2015	August 2015
National Skills Bulletin 2015	July 2015
Vacancy Overview 2014	May 2015
Lifelong Learning among Adults in Ireland, Quarter 4 2014	May 2015
A Study of the Current and Future Skills Requirements of the Marine/Maritime Economy to 2020	April 2015
The Expert Group on Future Skills Needs Statement of Activity 2014	April 2015
Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015 - 2020	February 2015
Regional Labour Markets Bulletin 2014	September 2014
Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2014	August 2014
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	April 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



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