

# Regional Labour Markets Bulletin 2013

December 2013

# Regional Labour Markets Bulletin 2013

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

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## Foreword

Regional labour market information is of vital importance in meeting the challenges of a changing economic environment, and adopting a stronger, data-driven approach to decision making at regional level requires an understanding of both the labour market and the business composition of each region's employment base. The Regional Labour Markets Bulletin 2013 has been produced by the Skills and Labour Market Research Unit in SOLAS on behalf of the Expert Group on Future Skills Needs. It is the second in a series of reports aimed at providing an analysis of the key labour market indicators for each of Ireland's eight administrative regions: Border, Dublin, Mid East, Midland, Mid West, South East, South West and West.



There is a growing demand for labour market intelligence that goes beyond national level and reflects the fact that geographical and sector variations occur in Ireland in terms of skills supply and demand. This report shows that while similarities exist across regions in terms of certain labour market indicators (such as vacancies advertised through the public employment services and job seekers), there is also evidence of differences across regions in areas such as employment/unemployment rates and the typical industries in each region. These variations and similarities in the composition of Ireland's workforce and business profile are an important consideration in any data driven decision making process relative to the labour market.

The data outlined in this report will serve as an important tool for those working in education and training provision, career guidance and services for jobseekers at a regional level.

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

Una Halligan  
Chairperson, Expert Group on Future Skills Needs



## Executive Summary

The *Regional Labour Markets Bulletin 2013* provides an overview of the Irish labour market at regional level with the objective of supporting the decision making process in the areas of education and training provision, labour market policies and career guidance. The report first presents labour market data relevant to each region, allowing a comparison between regions and the national average in terms of the supply and demand for skills. The subsequent sections of the report are devoted to each of Ireland's eight administrative regions: Border, Dublin, Mid East, Mid West, Midland, South East, South West and West.

When interpreting the data, it should be borne in mind that while the report aims to profile the regional labour markets, recruitment for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country. In other words, the supply emerging from education and training in a region is not confined to that region, just as the job opportunities in a region are not restricted to the local labour supply. There are also many differences across regional labour markets; e.g. contribution of agriculture to the regional employment, unemployment rate, labour force participation rate, share of high skilled employment, recent employment growth rates.

### Selected key points

- Employment: in quarter 1 2013,
  - Dublin and the West region had the highest employment rates at 62%, followed by the Mid East and South West regions (61%)
  - at least 30% of persons in each region were employed in high skilled occupations (managers, professionals and associate professionals); the share in Dublin was even higher at 48%
  - when compared to quarter 1 2012, the West and South West region had the highest rate of employment growth at 4% each, compared to a 1% change nationally and a 4% decline for the Mid East region
- Inter-regional employment: for some regions, where a person lives and where they work can vary; this is most evident in the Mid East region where only 55% of those who live in the Mid-East region actually work in that region
- Unemployment: in quarter 1 2013,
  - the highest rates were in the South East (18.4%) and the Midland region (17.1%), while the lowest rates were in the South West (11.1%) and Dublin (11.3%)
  - Dublin accounted for approximately one quarter of total national unemployment (70,000 persons), although it has a lower than average unemployment rate
  - unemployed persons had been mostly employed in skilled trades and elementary occupations across all regions
- Sector: in quarter 1 2013, industry was the largest sector in each region except Dublin, the Mid East and the Midland regions; human health was the largest in Dublin, while wholesale and retail was the largest in both the Mid East and the Midland regions
- Active enterprises:



- the wholesale and retail sector accounted for the largest share of active enterprises in most regions; professional activities accounted for the greatest share in Dublin and construction in the Mid East and West regions
  - in each region, the vast majority of enterprises employ fewer than 10 persons accounting for over 90% of enterprises in all but the Dublin region (88.9%)
- Medium to large businesses: Dublin accounted for more than three quarters of all medium to large financial businesses and more than two thirds of all medium to large ICT businesses
- The Dublin, South West and Mid East regions combined accounted for two thirds of all high tech manufacturing in Ireland
- Industrial output value: in 2011,
  - the South West accounted for €36.7 billion (or 36%) of the total national industrial output value of €100 billion; Dublin accounted for a further €19.2 billion (or almost a fifth)
  - the value of the industrial output in the modern sector alone was €58.8 billion; of this, two thirds was produced in the South West and Dublin combined
- Public Employment Service (PES) vacancies: although the highest number of PES vacancies was advertised for the Dublin region, the distributions of vacancies by occupational group varied little across regions, with most vacancies advertised for elementary, personal service and associate professional (mainly sales) occupations, and comparatively few for managers, professionals, admin/secretarial and operatives
- Live Register: the number of persons on the Live Register has increased in all regions since early 2008; when compared with August 2012, however, there was a 5% decline in the number of persons on the Live Register in August 2013; in terms of regions, the South-West region experienced the greatest decline at 7%, compared to a 2% decline for the Midland region
- Job seekers with the Public Employment Service (PES): the occupational distributions of job seekers was similar across regions; the highest share of job seekers in each region had previously been employed in skilled trades or elementary occupations; Dublin accounted for one quarter of all job seekers registered with the PES.

## Introduction

The *Regional Labour Markets Bulletin 2013* provides an overview of the labour market at regional level with the objective of supporting the decision making process in the areas of education and training provision, labour market policies and career guidance. This report sets out the key indicators relating to the supply and demand for skills in each of the regions in Ireland. The regional analysis presented here is based on the NUTS 3 regional classification, which is also used in the Central Statistics Office (CSO) when reporting data nationally and internationally (e.g. Eurostat). The NUTS 3 regions are: Border, Dublin, Mid East, Mid West, Midland, South East, South West and West<sup>1</sup>.

### NUTS 3 regions in Ireland

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

The regional analysis includes data from a variety of sources: CSO Quarterly National Household Survey (QNHS), CSO Census of Industrial Production, CSO Business Demography, CSO Live Register, CSO Census 2011, Datalreland (company database), Department of Social Protection (DSP) Jobs Ireland, DSP Job Seekers (Client Services System), IDA, newspapers, Higher Education Authority (HEA), and the Department of Education and Skills (DES) (for Post Leaving Cert (PLC) course data). When interpreting the data the following should be borne in mind:

- The report aims to profile the regional labour markets; however, recruitment for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country; in other words, the supply emerging from education and training in a region is not confined to that region, just as the job opportunities in a region are not restricted to the local labour supply
- The report uses the most recent data available at the time of analysis; however, the time periods associated with the latest available data vary across data sources (e.g. the latest employment data at occupational level is for quarter 1 2013, vacancy data covers the first nine months of 2013, the education and training data refers to enrolments in 2012, CSO Census data refers to 2011.)
- The units of measurements used differ across data sources (e.g. in the CSO, the QNHS uses the ILO definition of employment, Business Demography counts persons engaged in active enterprises, and

<sup>1</sup> The NUTS 3 classification differs from the Education and Training Boards (ETB) regions. In the NUT 3 classification, Tipperary is divided into Tipperary South and Tipperary North, with the former classified in the South East region, and the latter in the Mid West region; there is only one ETB for Co. Tipperary. In NUTS 3, Mayo is classified in the West region; in the ETB classification, Mayo is grouped with Sligo and Leitrim, which NUTS 3 classifies as the Border counties. In NUTS 3, Meath is classified in the Mid East region; in the ETB grouping, it is grouped with Louth, which NUTS 3 classifies as a Border county.

Census data refers to persons at work based on principal economic status); these are indicated when presenting the data

- In many instances, data at regional level is too small for statistical inferences and may be subject to statistical error (e.g. observation less than 1,000 cannot be reported for any statistics based on the QNHS; changes over time may be variation caused by sampling, not a trend)
- Occupational classifications differ across data sources and some accuracy is lost when mapping one classification to another (e.g. DSP uses MANCO, CSO uses Standard Occupational Classification (SOC) 2010, DataIreland uses Kompass classifications)
- In relation to vacancy data, **only** vacancies advertised through the Public Employment Service (DSP Jobs Ireland) are presented; the PES vacancy data is a subset of all vacancies and underrepresents the total vacancy market in the country
- In each region, recent examples are given of companies which announced, through the media (e.g. newspapers), the creation of jobs in the short-medium term; this is not an exhaustive list of all companies and is for illustrative purposes only; much of the job creation amongst micro or small companies may not be announced in the media
- The education and training overview covers only a sub-set of all provision and uses enrolments for all years of a course duration (e.g. 1 year or up to 5 years for some courses such as medicine) as a measure
- The term 'industry' should not be confused with 'manufacturing'; the industrial sector includes manufacturing, extraction/mining, and utilities, with the largest share being made up of manufacturing activities
- While cognisant of the fact that a share of healthcare and education is provided by the private sector, in a number of instances in the report, these two sectors (together with Public Administration and Defence (PAD)) are referred to as 'the public sector', given the significant share of State provision in these areas.

## Report Structure

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

## 1. Overview of the Regions

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

### Labour market indicators

Table 1 presents demographic and labour market statistics by region for quarter 1 2013. Dublin had the largest population at 1.3 million persons accounting for more than a quarter of the national population; it also had by far the largest density with over 1,000 persons per km<sup>2</sup>, compared to less than 100 persons per km<sup>2</sup> for all other regions.

Dublin and the West regions had the highest employment rates at 62%, followed by the Mid East and South West regions (61% each); the lowest employment rate was in the Border region (53%). In terms of unemployment, the highest rates were in the South East (18.4%) and the Midland region (17.1%), while the lowest rates were in the South West (11.1%) and Dublin (11.3%). The labour force participation rate in all regions was within two percentage points of the national average (59%), with the exception of the Border region (53%).

Table 1. Demographic and labour market statistics by region, q1 2013

	Area km <sup>2</sup>	POP 000s	P/km <sup>2</sup>	POP 15-64 000s	LF 000s	E 000s	UE 000s	E rate	UE rate	P rate
Border	12,200	510	42	324	209	177	32	53%	15.5%	52%
Dublin	900	1,268	1,408	866	617	547	70	62%	11.3%	60%
Mid East	6,100	542	89	354	257	221	37	61%	14.3%	62%
Midland	6,500	289	44	187	129	107	22	56%	17.1%	57%
Mid West	8,300	378	46	247	174	147	27	58%	15.6%	57%
South East	9,400	503	54	326	229	187	42	55%	18.4%	57%
South West	12,200	670	55	441	312	277	35	61%	11.1%	57%
West	13,800	439	32	285	211	184	27	62%	12.9%	59%
Ireland	69,400	4,599	66	3,030	2,087	1,796	291	59%	13.7%	58%

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

### Sectoral employment

Table 2 presents the sectoral distribution of employment in each region in quarter 1 2013. Industry was the largest sector in each region except Dublin, the Mid East and the Midland regions; human health was the largest in Dublin, while wholesale and retail was the largest in both the Mid East and the Midland regions. In terms of employment share, agriculture was negligible in the Dublin region, while it accounted for at least 10% in the South East and Border regions.

In each region, approximately one quarter of the total regional employment was in public administration, education and health with the share in the Midland region reaching 30%. Of the 280,000 persons employed in

the financial, ICT and professional services sectors nationally, 134,000 (or 48%) were in the Dublin region. In contrast, of the almost 100,000 persons employed in agriculture nationally, 38,000 were in the Border and South East regions.

Table 2. Sectoral employment by region, (000s) q1 2013

Sector	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
Agriculture	18.2	1.9	9.7	6.1	8.5	19.7	17.6	14.5	96.2
Industry	24.5	41.3	27.0	15.1	23.0	30.5	45.5	31.1	238.0
Construction	11.5	17.6	15.6	5.7	9.2	13.0	14.2	9.6	96.3
Wholesale and retail	25.4	78.6	34.4	18.6	19.1	27.9	42.6	27.6	274.1
Transportation	8.4	32.6	11.0	5.5	7.3	5.7	11.3	6.9	88.8
Accomm. and food	11.4	35.0	14.8	6.4	10.3	10.5	19.5	12.4	120.3
ICT	4.7	35.5	11.7	3.3	4.9	3.1	8.0	6.2	77.4
Financial	6.3	53.6	12.2	2.6	5.7	6.1	8.4	4.7	99.7
Professional activities	7.3	44.9	12.1	3.4	6.3	8.3	14.8	6.7	103.9
Admin. and support	3.4	22.4	6.1	3.2	4.6	4.7	9.2	6.0	59.5
PAD	9.7	30.2	11.9	7.3	7.8	8.5	11.6	8.2	95.2
Education	14.9	37.3	18.3	8.9	13.4	14.9	23.4	16.4	147.5
Human health	23.4	82.0	23.0	15.5	18.3	23.0	37.6	24.6	247.5
Other NACE activities	7.8	34.2	12.7	5.2	8.2	10.6	13.4	9.6	101.8
<b>Total</b>	<b>176.8</b>	<b>547.1</b>	<b>220.6</b>	<b>106.8</b>	<b>146.6</b>	<b>186.5</b>	<b>277.1</b>	<b>184.5</b>	<b>1,846</b>

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

In 2011 there were approximately 185,000 active enterprises outside of agriculture and the public sector in Ireland. Nationally, the highest number of active enterprises was in wholesale and retail and construction; combined Dublin and the South West accounted for 41% of all wholesale and retail enterprises and over a third of all construction enterprises.

The wholesale and retail sector accounted for the largest share of active enterprises in all regions except Dublin; in Dublin, professional activities had the largest share at 23%, far higher than the national average of 16%. The Dublin region also accounted for over a half of all ICT enterprises nationally and over two thirds of all financial and insurance enterprises.

Table 3. Number of active enterprises by business economy sectors and region<sup>2</sup>, 2011

Region	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
Mining and quarrying	***	***	***	***	***	***	***	***	131
Manufacturing	1,513	2,483	1,447	795	1,102	1,459	1,931	1,093	11,793
Electricity, gas, supply	***	***	***	***	***	***	***	***	56
Water; sewerage, waste	115	179	97	***	***	87	135	82	804
Construction	4,346	7,348	4,661	2,312	3,095	4,157	5,934	4,114	35,966
Wholesale and retail	5,005	11,114	4,621	2,516	3,603	4,741	6,380	4,068	42,047
Transportation	1,294	2,535	1,356	585	840	1,148	1,511	791	10,060
Accomm. and food	2,075	3,418	1,436	938	1,650	1,972	2,871	1,909	16,269
ICT	449	5,484	1,089	248	559	521	1,060	642	10,052
Financial and insurance	250	3,504	319	96	222	190	418	221	5,220
Real estate activities	967	4,268	1,333	453	772	944	1,564	1,004	11,305
Professional activities	1,902	13,030	3,203	1,035	2,011	2,166	4,619	1,943	29,908
Admin. and support	758	3,819	1,264	517	1,123	1,002	1,517	952	10,951
<b>Total</b>	<b>18,994</b>	<b>57,312</b>	<b>20,895</b>	<b>9,618</b>	<b>15,101</b>	<b>18,496</b>	<b>28,048</b>	<b>16,922</b>	<b>185,386</b>

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

The following activities have been excluded: agriculture, public sector and the activities of holding companies  
 \*\*\* denotes small numbers which have been excluded to protect the confidentiality of individual enterprises

Table 4 presents the share of active enterprises (outside agriculture and the public sector), by size, for each region for 2011. In each region, the vast majority of enterprises employ fewer than 10 persons with over 90% in all but the Dublin region (88.9%). For all other enterprise sizes, Dublin had above the national average share.

Table 4. Active enterprises by enterprise size, 2011

Enterprise size by no of employees	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
<b>Under 10</b>	90.5%	88.9%	92.7%	92.3%	91.6%	91.1%	91.3%	91.4%	90.7%
<b>10 - 19</b>	2.7%	5.4%	4.3%	***	4.8%	3.8%	5.0%	4.3%	4.4%
<b>20 - 49</b>	2.7%	3.4%	2.0%	2.1%	2.4%	2.5%	2.4%	2.4%	2.7%
<b>50 - 249</b>	1.0%	1.9%	0.8%	0.9%	1.1%	1.0%	1.1%	1.2%	1.3%
<b>250 and over</b>	0.1%	0.5%	0.1%	***	0.2%	0.1%	0.2%	0.1%	0.2%

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

Table 5 shows the data on companies employing 50 persons or more by region for 2012<sup>3</sup>. With the exception of agriculture, the highest number of medium to large enterprises in each sector was located in the Dublin region. In particular, Dublin accounted for more than three quarters of all medium to large financial

<sup>2</sup>The geographical breakdown is approximate as it is based on the address at which an enterprise is registered for Revenue purposes, rather than where the business operates; the discrepancy in totals is due to a 'region unknown' category which has been excluded.

<sup>3</sup>The data in Table 5 includes companies with 50 employees or more; in contrast, the corresponding table in last year's edition, *Regional Labour Markets Bulletin 2012*, included only those companies employing 51 persons or more. The company data is therefore not comparable between the two reports.

enterprises and more than two thirds of all medium to large ICT enterprises. In contrast, Dublin accounted for less than one quarter of all medium to large industrial enterprises. With the exception of education and public administration and defence (PAD), the Midland region had the lowest number of medium to large enterprises in all sectors.

Table 5. Number of medium to large companies (employing 50 persons or over), 2012

Sector	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
Agriculture	6	3	5	-	-	6	3	1	24
Industry	99	183	76	51	62	99	112	70	752
Construction	3	26	14	4	11	13	12	15	98
Wholesale & retail	41	325	56	28	26	75	124	54	729
Transport & Storage	5	93	7	3	10	14	16	7	155
Accomm.& food	39	134	30	12	24	49	73	47	408
ICT	7	145	7	3	10	4	25	10	211
Financial	4	160	7	2	3	5	15	6	202
Professional activities	3	140	9	4	21	14	41	17	249
Admin. and support	8	97	12	3	15	12	23	5	175
PAD	15	71	10	14	15	14	12	16	167
Education	44	139	36	23	21	47	55	22	387
Health	40	112	25	18	29	36	47	26	334
Other	4	72	6	0	3	3	7	4	99
<b>Total</b>	<b>318</b>	<b>1,700</b>	<b>300</b>	<b>165</b>	<b>250</b>	<b>391</b>	<b>565</b>	<b>300</b>	<b>3,990</b>

Source: Data Ireland database

Table 6 presents employment in manufacturing by technology intensity type<sup>4</sup> and sector for quarter 1 2013. Of the 212,000 persons employed in manufacturing in quarter 1 2013, the highest share (20%) was in the South-West region. Combined Dublin, the South West and the Mid East regions accounted for two thirds of all high tech manufacturing in Ireland. The lowest share of high tech manufacturing was in the Midland region at 4%. The West region had the highest number of persons employed in medium-high tech manufacturing at over 12,000 (or 31%).

<sup>4</sup> High tech manufacturing comprises the manufacture of: pharmaceuticals and computer, electronic & optical products  
 Medium-high tech manufacturing: chemicals, electrical equipment, machinery & equipment, motors and other transport equipment  
 Medium-low tech manufacturing: coke/refined petroleum, rubber/plastics, non-metallic mineral products, basic metals and fabricated metal products  
 Low-tech manufacturing: food and beverages, tobacco, textiles, wood, paper, furniture and printing

Table 6. Employment in manufacturing by technology type and region, q1 2013

Sector	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
High tech	3,000	15,300	7,400	2,200	5,400	4,600	15,500	5,000	58,400
Medium-high	3,300	2,700	2,500	2,500	4,900	4,600	6,300	12,100	38,900
Medium-low	4,900	3,400	3,000	2,900	4,600	5,300	4,900	2,500	31,500
Low tech	11,200	15,000	10,000	5,500	5,700	13,000	14,800	8,300	83,500
<b>Total</b>	<b>22,400</b>	<b>36,500</b>	<b>23,000</b>	<b>13,000</b>	<b>20,500</b>	<b>27,500</b>	<b>41,500</b>	<b>27,900</b>	<b>212,300</b>
High tech	5%	26%	13%	4%	9%	8%	27%	8%	100%
Medium-high	8%	7%	6%	7%	13%	12%	16%	31%	100%
Medium-low	16%	11%	9%	9%	14%	17%	16%	8%	100%
Low tech	13%	18%	12%	7%	7%	16%	18%	10%	100%
<b>Total</b>	<b>11%</b>	<b>17%</b>	<b>11%</b>	<b>6%</b>	<b>10%</b>	<b>13%</b>	<b>20%</b>	<b>13%</b>	<b>100%</b>

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

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

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

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

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

Source: CSO (Census of Industrial Production)\*

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

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

Source: CSO (Census of Industrial Production)\*

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



## Occupational employment

Table 8 presents regional employment by occupational group for quarter 1 2013. Of the 1.85 million persons in employment in Ireland in quarter 1 2013, professionals accounted for the largest number (354,000) followed by skilled tradespersons (269,000). Of all those employed in professional occupations, Dublin accounted for a third. Almost a fifth of all skilled tradespersons were employed in the South West region with a further 15% in Dublin. At least 30% of persons in each region were employed in high skilled occupations (managers, professionals and associate professionals); however, the share in Dublin was even higher at 48%.

Table 8. Regional employment by occupational group (000s), q1 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	10.6	54.3	18.9	7.4	10.4	15.7	21.5	11.7	150.5
Professionals	28.2	127.3	41.6	18.9	28.0	25.3	48.9	36.0	354.2
Associate professionals	15.3	82.7	27.2	10.7	15.5	15.9	29.4	17.2	213.9
Administrative and Secretarial	16.5	70.5	27.2	10.7	16.6	19.3	25.6	15.5	201.9
Skilled Trades	37.8	40.7	33.8	15.2	24.8	37.1	48.7	31.1	269.2
Caring, Leisure and Other Service	14.8	38.6	15.0	9.8	11.1	18.0	21.6	14.1	143.0
Sales and Customer Services	16.7	46.9	18.8	9.4	12.6	14.2	26.5	17.0	162.1
Operatives	16.7	27.2	16.9	12.5	13.7	16.1	24.1	19.5	146.7
Elementary Occupations	20.2	58.9	21.2	12.3	13.9	24.9	30.8	21.9	202.2
<b>Total</b>	<b>176.8</b>	<b>547.1</b>	<b>220.6</b>	<b>106.8</b>	<b>146.6</b>	<b>186.5</b>	<b>277.1</b>	<b>184.0</b>	<b>1,846</b>

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

## Inter-regional employment/residence

The employment data outlined thus far has been based on where a person resides, rather where the person works. Table 9 shows that for some regions, where a person lives and where they work can vary. This is most evident in the Mid East region where only 55% of those who live in the Mid-East region actually work in that region; those who resided in the Mid East region but worked elsewhere (primarily in Dublin), were more likely to be in high skilled occupations (managers, professionals and/or associate professionals), to have third level qualifications and to be working in information and communication and financial activities, and less likely to be employed in construction, than those who both lived and worked in the Mid East region. Conversely, for the South-West region, 95% of those who lived in this region also worked in the same region.

This analysis shows that the skill levels of those living in the region does not necessarily reflect the skills demand and supply of the region, and this is an important factor to consider when examining regional skills levels and sectors of work.

Table 9. Region of employment by region of residence, q1 2013

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Employed in same region	83%	94%	55%	75%	87%	84%	95%	85%	85%
Employed elsewhere	7%	3%	39%	18%	7%	10%	2%	9%	10%
No Answer	10%	3%	6%	7%	6%	6%	3%	6%	5%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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

## Vacancies

Although considerably below the peak in 2007, vacancies continued to arise during 2013. In the first nine months of 2013, almost 50,000 vacancies were advertised on DSP Jobs Ireland internet portal (Table 10). Of these the highest numbers nationally were for elementary, personal service and associate professional occupations; Dublin had the highest number of vacancies across all occupational groups. Indeed, Dublin accounted for 39% (19,509 vacancies) of all vacancies while the Midland region accounted for just 5% (2,653).

Although the highest number of vacancies was advertised for the Dublin region, the distributions of vacancies by occupational group varied little across regions with most vacancies advertised for elementary, personal service and associate professional (mainly sales) occupations, and comparatively few for managers, professionals, admin/secretarial and operatives. This could also be a consequence of the occupational bias in advertising, as many employers recruiting for these positions use advertising channels other than Jobs Ireland.

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

Occupation	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Total
Managers	71	349	83	36	47	67	176	92	921
Professionals	235	1,038	281	129	199	111	401	201	2,595
Associate professionals	654	2,801	821	407	568	892	1,033	578	7,754
Administrative and Secretarial	244	1,120	237	113	178	160	350	145	2,547
Skilled Trades	644	1,682	789	482	473	555	1,029	548	6,202
Caring, Leisure and Other Service	812	4,080	933	337	441	434	913	687	8,637
Sales and Customer Services	662	2,730	393	326	363	464	775	470	6,183
Operatives	242	1,233	500	258	281	380	447	238	3,579
Elementary Occupations	863	4,476	1,125	565	655	1,031	1,814	823	11,352
<b>Total</b>	<b>4,427</b>	<b>19,509</b>	<b>5,162</b>	<b>2,653</b>	<b>3,205</b>	<b>4,094</b>	<b>6,938</b>	<b>3,782</b>	<b>49,770</b>

Source: DSP Jobs Ireland database

## Sourcing from outside the European Economic Area (EEA)

The data on new employment permits issued to non-EEA workers in 2012 shows that some vacancies continue to prove difficult to fill from the Irish labour supply<sup>5</sup>. Approximately 3,000 new employment permits were issued to non-EEA workers in 2012 (Table 11). New employment permits were issued in all regions although the majority (61%) were issued in Dublin, particularly for professional occupations. For all other regions the numbers issued were relatively small particularly for non-professional occupations.

Table 11. Number of employment permits by occupation and region, 2012

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
<b>Managers</b>	8	191	16	6	9	4	22	5	261
<b>Professionals</b>	61	1,047	87	90	70	18	177	149	1,699
<b>Associate professionals</b>	2	46	6	4	2	3	14	2	79
<b>Administrative and Secretarial</b>	-	9	3	-	-	-	-	-	12
<b>Skilled Trades</b>	8	31	7	15	1	3	8	7	80
<b>Caring, Leisure and Other Service</b>	3	43	17	3	10	4	12	11	103
<b>Sales and Customer Services</b>	2	51	1	-	1	-	2	-	57
<b>Operatives</b>	2	9	4	-	2	11	-	-	28
<b>Elementary Occupations</b>	15	126	29	7	20	19	15	23	254
<b>All other occupations</b>	9	221	22	14	10	7	36	6	325
<b>Total</b>	<b>110</b>	<b>1,774</b>	<b>192</b>	<b>139</b>	<b>125</b>	<b>69</b>	<b>286</b>	<b>203</b>	<b>2,898</b>

Source: DJEI

Note: Figures do not include a small number of new work permits for which a NUTS 3 region was, for various reasons, not assignable; occupation classifications are based on classifications assigned by the DJEI and are therefore not directly comparable with data presented in the National Skills Bulletins

## Replacement demand and labour market transitions

Replacement demand refers to the skills demand that results from retirements and other exits from employment (excluding vacancies arising from turnover within an occupation). Given the on-going employment challenges in Ireland's economy, in the short-term job opportunities for many occupations are expected to arise mainly due to replacement demand. Based on the employment levels in quarter 1 2013 and a conservative annual replacement rate of 2%<sup>6</sup>, it is estimated that the employment opportunities arising from replacement demand will be approximately 37,000 per annum (Table 12). Employment opportunities will arise in all regions and across all occupational groups.

<sup>5</sup> When interpreting employment permit data, it should be noted that the number of work permits issued for most occupations represents an over-estimation of the true annual inflow of non-EEA workers into the Irish labour market because not all new employment permits are issued to first time applicants; for instance, when an employment permit holder is made redundant, a new permit is issued rather than the old permit being renewed.

<sup>6</sup> The annual replacement rate varies according to occupation; for example, it may be as low as 2.5% for professional occupations or up to 3.9% for labourers (*FÁS/ESRI Manpower Forecasting Studies. Report No. 9. Estimating Labour Force Flows, Job Openings and Human Resource Requirements*. April 2001). During a recession, replacement rates are likely to be lower and therefore a conservative estimate of 2% was used here.

Table 12. Estimated replacement demand by occupational group and region, q1 2013

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Total
<b>Managers</b>	200	1,100	400	100	200	300	400	200	3,000
<b>Professionals</b>	600	2,500	800	400	600	500	1,000	700	7,100
<b>Associate professionals</b>	300	1,700	500	200	300	300	600	300	4,300
<b>Administrative &amp; Secretarial</b>	300	1,400	500	200	300	400	500	300	4,000
<b>Skilled Trades</b>	800	800	700	300	500	700	1,000	600	5,400
<b>Caring/Leisure</b>	300	800	300	200	200	400	400	300	2,900
<b>Sales &amp; Customer Service</b>	300	900	400	200	300	300	500	300	3,200
<b>Operatives</b>	300	500	300	300	300	300	500	400	2,900
<b>Elementary occupations</b>	400	1,100	400	200	300	500	600	400	4,000
<b>Total</b>	3,500	10,900	4,400	2,100	2,900	3,700	5,500	3,700	36,800

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

Note: Estimates based on 2% annual attrition rate and q1 2013 employment levels

Exits from employment to inactivity can be further examined by analysing national labour market transitions. The National Skills Bulletin 2013<sup>7</sup> showed that in 2012 transitions to inactivity were mostly due to retirement, education or home duties. For some occupations, the share exiting due to retirement was large (e.g. farmers, nurses, teachers and managers in general), while it was small for other occupations (e.g. sales occupations); the share of exits to education was greater for lower skilled occupations (e.g. sales and elementary occupations), while the share of exits to home duties was highest for clerical and personal services occupations. Table 13 shows the share of persons in employment for an occupation who exited employment in 2012. The share of exits was particularly high for elementary occupations (e.g. bar staff, waiters and agricultural labourers), personal services (e.g. childminders, care workers) and sales occupations (e.g. sales assistants). These national patterns in exits from employment by occupation are a useful reference for examining replacement demand at regional level.

Table 13. Exits to inactivity from employment for selected occupations, 2012

Occupational group	Exit to inactivity				
	No.	% of emp	No.	% of emp	
Functional managers	1,700	4%	Other construction trades	2,300	13%
Managers & proprietors in services	2,000	8%	Chefs & cooks	2,300	10%
Nurses & midwives	3,100	5%	Childminders	3,700	20%
Secondary teachers	2,600	9%	Care workers, home workers, etc.	5,400	11%
Primary & nursery teachers	1,800	5%	Hairdressers & beauticians, etc.	1,400	7%
Other educational professionals	1,600	11%	Housekeepers & caretakers, etc.	1,400	10%

<sup>7</sup> National Skills Bulletin 2013, Behan et al (2013)

Exit to inactivity					
Occupational group	No.	% of emp		No.	% of emp
Artistic, literary & media occupations	2,500	18%	Sales assistants	19,000	15%
Business sales executives	1,600	7%	Routine operatives	2,000	8%
Government admin. occupations	1,600	4%	Road transport drivers	2,900	5%
Financial administrative occupations	4,000	7%	Elementary agricultural occupations	2,600	22%
Other administrators	6,900	13%	Elementary construction occupations	3,700	13%
Personal assistants	3,100	10%	Elementary cleaning occupations	4,700	12%
Receptionists	1,600	13%	Elementary sales & storage	2,100	10%
Farmers	4,300	7%	Kitchen & catering assistants	2,100	10%
Horticultural, agricultural trades n.e.c.	1,400	11%	Waiters & waitresses	4,800	23%
Electrical & electronic trades etc.	1,500	4%	Bar staff	4,600	27%
Carpenters & joiners	1,800	12%			

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

### Employment growth - trends and expected expansion demand

Employment trends by sector are often used to indicate expected future employment growth. Therefore in this section we examine employment change by sector over the five year period quarter 1 2008 to quarter 1 2013. We also look at the most recent employment change between quarter 1 2012 and quarter 1 2013. The labour market outlook for selected occupations, based in part on employment growth trends and forecasts, is also provided.

### Employment change 2008-2013

Between quarter 1 2008 and quarter 1 2013, employment in Ireland decreased by 300,000 (Table 14). Over the five year period, employment declined in each region, with the most pronounced decreases, in absolute terms, recorded in the Dublin, Border, South East and Mid East regions, at -89,000, -42,000, -37,000 and -34,000 respectively. The smallest decline was recorded in the Midland region (less than 19,000). In relative terms, the greatest decline was recorded in the Border and South East regions (at -19% and -16% respectively).

Despite the overall decline nationally, employment in information and communication activities grew by 5,200, education grew by almost 8,000 and health by over 25,000; Dublin accounted for almost half of all growth in the health sector. In each region, the greatest decline in employment, in absolute terms, was recorded in construction. Indeed, construction accounted for at least 45% of the fall in employment in each

region, except the West, South West and Midland regions where it was considerably higher at 83%, 69% and 63% respectively.

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

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Total
Agriculture, forestry and fishing	*	*	-5.3	-3.7	-4.3	*	-2.5	-4.8	-20.2
Industry	-6.1	-16.6	-9.5	-4.0	-6.9	-4.1	-2.5	3.4	-46.1
Construction	-20.0	-40.7	-15.9	-11.6	-12.4	-18.9	-22.9	-17.2	-159.5
Wholesale and retail trade; repair of motor vehicles and motorcycles	-6.5	-15.6	-3.2	*	-7.2	-7.1	-2.6	-2.0	-45.5
Transportation and storage	*	-3.3	*	*	-1.9	-2.3	*	*	-6.1
Accommodation and food service activities	-2.3	-2.3	*	-1.6	*	-1.8	-4.0	*	-12.0
Information and communication	*	*	2.0	*	*	*	*	2.3	5.2
Financial, insurance and real estate activities	-1.7	-3.8	*	*	2.0	*	*	*	-5.0
Professional, scientific and technical activities	*	-2.0	*	-2.1	*	*	*	-1.6	-7.9
Administrative and support service activities	-4.3	-10.1	-1.9	*	-1.6	-2.5	-3.3	*	-23.6
Public administration and defence; compulsory social security	*	-3.8	*	*	*	*	*	-2.8	-8.2
Education	1.8	*	*	*	*	1.9	*	1.6	7.8
Human health and social work activities	*	11.5	*	4.5	2.1	*	5.5	*	25.4
Other NACE activities	-3.1	-2.3	*	*	*	*	*	*	-5.2
<b>Total</b>	<b>-41.8</b>	<b>-89.3</b>	<b>-34.1</b>	<b>-18.3</b>	<b>-26.7</b>	<b>-36.7</b>	<b>-33.1</b>	<b>-20.8</b>	<b>-300.8</b>

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

### Employment change 2012-2013

Total national employment grew by 19,000 between quarter 1 2012 and quarter 1 2013 (Table 15).

Employment levels increased across all regions except the Mid East and Mid West which declined by over 8,000 and over 4,000 respectively. The largest growth in absolute and relative terms was in the South West and West which combined accounted for almost 17,000 additional persons in employment year on year.

In terms of sectors, agriculture recorded the largest growth (+15,700) particularly in the Border and South West regions<sup>8</sup>. Employment in health grew by almost 8,000, more than 6,000 of which was in the Dublin region alone. More than a third of the employment growth in the South West was due to increases in industry (+3,700 persons). Construction recorded the largest decline (-7,000) with declines across all regions except the South East and the Mid East. The largest sectoral decline in any given region was in Dublin where education fell by 6,000.

<sup>8</sup> Estimates of employment in agriculture have been shown to be sensitive to sample changes over time, and growth rates in this sector should be interpreted with caution.

Table 15. Employment change by sector and region (000s), Q1 2012 - Q1 2013

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Total
Agriculture, forestry and fishing	4.2	*	1.8	-1.1	*	3.7	5.4	1.8	15.7
Industry	*	*	-3.0	*	*	*	3.7	2.0	2.0
Construction	*	-3.4	1.5	-2.2	-1.0	2.2	-3.2	*	-7.0
Wholesale and retail trade; repair of motor vehicles and motorcycles	*	2.8	-2.3	1.8	-2.1	*	*	2.4	2.8
Transportation and storage	*	-1.1	1.8	1.0	-1.7	-2.2	*	1.2	-1.5
Accommodation and food service activities	*	3.7	3.0	*	*	-1.2	-2.7	*	2.7
Information and communication	1.1	-2.9	*	*	*	*	*	*	-1.1
Financial, insurance and real estate activities	1.8	1.8	-3.5	*	*	1.0	*	-1.4	-1.3
Professional, scientific and technical activities	1.3	3.6	*	*	*	*	2.6	-1.1	5.9
Administrative and support service activities	-2.6	*	-1.9	*	*	*	*	1.7	-3.0
Public administration and defence; compulsory social security	*	1.0	*	*	-1.3	*	-1.1	-1.2	-4.3
Education	*	-6.0	*	*	2.9	*	1.9	*	*
Human health and social work activities	*	6.4	-5.8	3.2	1.6	*	2.7	*	7.9
Other NACE activities	-2.2	-2.7	*	*	*	2.7	2.2	*	*
<b>Total</b>	<b>2.3</b>	<b>5.0</b>	<b>-8.3</b>	<b>2.1</b>	<b>-4.1</b>	<b>5.0</b>	<b>10.1</b>	<b>6.8</b>	<b>19.0</b>

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

## Employment outlook by occupation

Table 16 presents a list of occupations with a higher than average medium term employment growth prospect. The list is intended to indicate areas in which job opportunities are expected to be greater than elsewhere. The numbers employed in each occupation are provided to contextualise the relative magnitude (hundreds or thousands) of job opportunities which may arise through potential replacement and expansion demand. The share of third level graduates currently employed in these occupations serves as a guide for the level of education and training provision required for these occupations. An indication of unemployment is given where numbers are sufficiently large. The employment growth prospects are based on an assumed optimistic recovery scenario, and any issues such as a delayed recovery in the EU and/or issues with credit flow in the Irish economy will result in less optimistic growth rates.

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

Occupation	Number Employed	% Third Level Graduates	Unemployment	Employment growth prospects
Functional managers & directors	47,800	56%	Below average	Above average
Financial managers & directors	4,000	80%	n/a	Above average
Advertising, marketing & sales directors	5,600	67%	n/a	Above average
Human resource managers	5,300	93%	n/a	Above average
ICT specialist & project managers	13,900	88%	Below average	Above average
Financial institution managers & directors	5,900	82%	Below average	Above average
Managers & directors in transport & logistics	7,200	35%	Below average	Above average
Managers & directors in retail & wholesale	15,000	51%	Below average	Above average
Restaurant managers	5,700	50%	n/a	Above average
Managers & proprietors in other services	25,800	40%	Below average	Above average
Electrical & electronic engineers	4,500	84%	n/a	Above average
IT Business analysts & systems designers	*	82%	n/a	Above average
Programmers & software developers	17,300	95%	Below average	Above average
Web designers & developers	*	90%	n/a	Above average
ICT professionals n.e.c.	7,600	95%	Below average	Above average
Legal professionals	12,100	98%	Below average	Above average
Accountants & tax experts	33,100	95%	Below average	Above average
Mgt. consultants, business analysts & project managers	7,400	83%	Below average	Above average
Actuaries, economists & statisticians; other business professionals	7,500	88%	Below average	Above average
Media professionals	4,400	86%	n/a	Above average
Other technicians	4,800	82%	n/a	Above average
IT operations technicians	8,300	66%	Below average	Above average
IT user support technicians	3,800	78%	n/a	Above average
Sports & fitness occupations	7,500	58%	Below average	Above average
Brokers & insurance underwriters	4,400	71%	n/a	Above average
Finance & investment analysts	7,500	90%	Below average	Above average
Financial & accounting technicians	3,600	89%	n/a	Above average
Financial accounts managers	8,600	72%	Below average	Above average
Other business associate professionals	6,500	81%	Below average	Above average
Marketing associate professionals	4,700	83%	n/a	Above average
Sales accounts & business development managers	16,800	74%	Below average	Above average
Estate agents etc.; conference and exhibition managers	4,800	62%	n/a	Above average
Regulations inspectors; health & safety officers	3,600	70%	n/a	Above average
Financial administrative occupations	56,000	51%	Below average	Above average
Office managers & supervisors	6,700	60%	Below average	Above average
Metal machining, fitting & instrument making trades	23,000	32%	Below average	Above average
Electrical & electronic trades etc.	35,500	39%	Below average	Above average
Leisure & travel service occupations	8,400	51%	Average	Above average
Hairdressers & beauticians, etc.	21,300	21%	Below average	Above average
Sales related occupations	10,300	35%	Below average	Above average
Sales supervisors	3,800	24%	n/a	Above average
Customer service occupations	17,300	51%	Below average	Above average
Road transport drivers	57,100	9%	Below average	Above average
Other drivers & transport operatives	4,100	10%	n/a	Above average

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

\*Numbers are less than 3,000



## Job announcements

Monitoring of recent announcements in the media shows that job creation announcements continue to arise. Between January and September 2013, the number of job creation announcements exceeded the number of job loss announcements. There were job creation announcements across all regions, but were nonetheless concentrated in the Dublin region and, to a lesser extent, the South West.

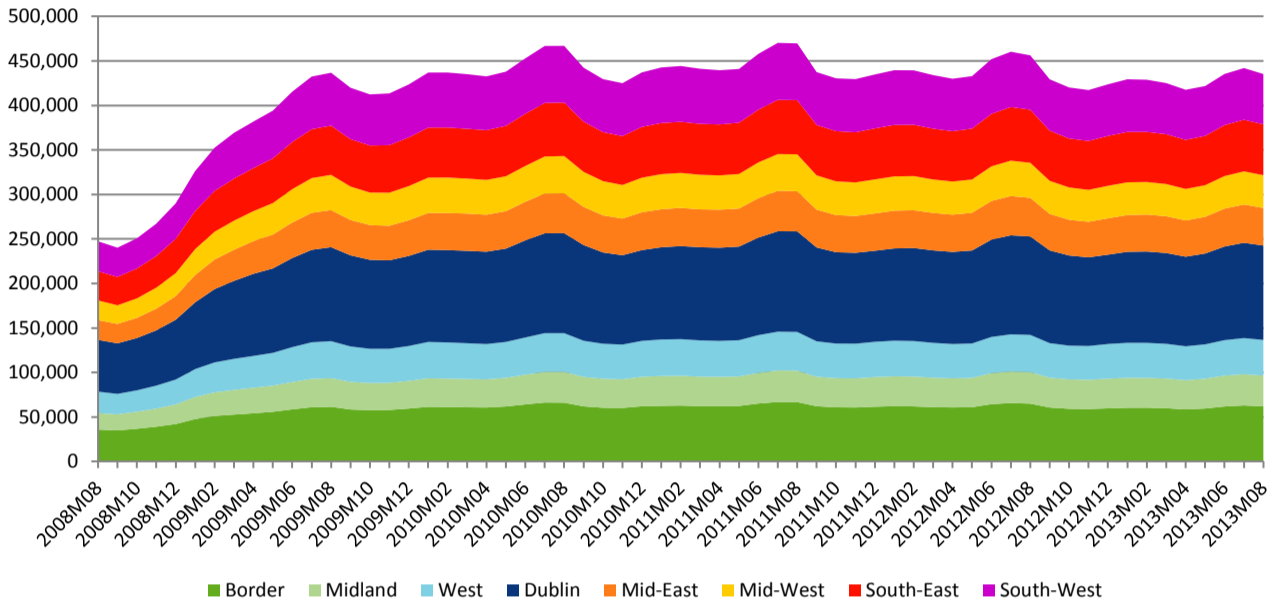
## Live Register

The Live Register is a count of the number of persons registering for unemployment assistance and other statutory entitlements with the Department of Social Protection; although not an official measure of unemployment it provides a timely indication of trends in unemployment. In August 2013, there were 435,000 persons on the Live Register; approximately a quarter of all persons on the Live Register were from the Dublin region.

The number of persons on the Live Register has increased in all regions since early 2008 (Figure 1). Since mid-2010, the numbers on the Live Register in each region have remained relatively stable at a level significantly higher than those observed prior to the downturn in the economy. There is a pronounced seasonality in the numbers signing on the Live Register in each region, with numbers increasing in each region (by approximately 5%) during the summer months and declining in September every year.

When compared with August 2012, there was a 5% decline in the number of persons on the Live Register in August 2013; in terms of regions, the South-West region experienced the greatest decline at 7%, compared to a 2% decline for the Midland region.

Figure 1. Persons on Live Register by region, August 2008-August 2013



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

The age distributions of persons on the Live Register were broadly similar across regions (Table 17a). In each region, the share of persons aged under-25 on the Live Register ranged between 15% and 18% (Table 17b). The highest share of under-25s on the Live Register (18%) was in the Midland and Border regions, with the lowest share in the South-West region.

Table 17a. Live Register by age group and region, August 2013

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	11,067	17,391	6,826	6,244	6,168	9,566	8,381	6,302	71,945
25 years and over	50,842	88,618	35,358	28,373	30,723	47,510	48,150	33,761	363,335
<b>Total</b>	<b>61,909</b>	<b>106,009</b>	<b>42,184</b>	<b>34,617</b>	<b>36,891</b>	<b>57,076</b>	<b>56,531</b>	<b>40,063</b>	<b>435,280</b>

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

Table 17b. % Distribution of Live Register by age group and region, August 2013

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	18%	16%	16%	18%	17%	17%	15%	16%	17%
25 years and over	82%	84%	84%	82%	83%	83%	85%	84%	84%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

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

The gender distributions of persons on the Live Register in August 2013 (outlined in Table 18) were broadly similar across the regions with males accounting for an average of 61% in each region. The highest share of males was recorded in Dublin (63%) and the lowest share in the West region (59%). While the number of females on the Live Register increased in some regions, the number of males declined across all regions when compared with August 2012.

Table 18. Number of persons on the Live Register by gender and region, August 2013

Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	37,701	66,889	25,255	20,891	22,393	34,909	34,613	23,792	266,443
Female	24,208	39,120	16,929	13,726	14,498	22,167	21,918	16,271	168,837
<b>Total</b>	<b>61,909</b>	<b>106,009</b>	<b>42,184</b>	<b>34,617</b>	<b>36,891</b>	<b>57,076</b>	<b>56,531</b>	<b>40,063</b>	<b>435,280</b>

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

## Official unemployment

In this section Quarterly National Household Survey (QNHS) data is used to report on the official unemployment statistics. While the Live Register data is frequently mentioned in discussions on unemployment, it is not specifically designed to measure unemployment.

Table 19 presents unemployment by sector and region for quarter 1, 2013. Almost a quarter of persons unemployed did not state a previous sector of employment. Of the 222,000 unemployed persons who stated a previous sector of employment, one in four had previously been employed in the construction sector; in each region, the number (and share) of unemployed persons previously employed in construction was higher than for any other sector. Similarly, in each region, industry and the wholesale/retail sectors each accounted for over a 10% share of persons unemployed, with the exception of Dublin, where a 9% share of the unemployed had previously worked in industry).

Dublin accounted for approximately one quarter of total national unemployment (70,000 persons), although it has a lower than average unemployment rate. Dublin had the highest number of persons unemployed from each sector although its share of unemployed persons was lower than the national average for most sectors excluding information and communication, financial, professional and administrative activities.

Table 19. Unemployment by sector and region, (000s) q1 2013

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	State
Agriculture, forestry and fishing	1.1	*	*	*	*	*	*	*	4.1
Industry	4.0	6.6	4.4	2.9	3.0	4.4	3.8	2.7	32.0
Construction	6.4	10.2	8.5	4.2	5.6	10.0	8.1	5.4	58.5
Wholesale and retail trade; vehicle repair	3.3	9.1	4.6	4.0	3.2	5.2	3.4	3.4	36.2
Transportation and storage	*	1.8	1.0	*	*	1.8	*	*	8.4
Accommodatio/food service	1.6	3.6	1.6	1.3	1.4	2.7	2.2	1.8	16.1
Information and communication	*	2.7	1.2	*	*	*	*	*	7.0
Financial, insurance & real estate	*	3.6	*	*	*	*	*	*	7.2
Prof., scientific & techactivities	*	2.5	*	*	*	1.0	*	*	7.8
Admin. and support service activities	*	2.7	1.0	*	1.1	1.2	1.4	*	9.5
PAD	*	*	*	*	*	*	*	*	3.0
Education	*	1.0	*	*	*	*	*	*	5.5
Human health and social work	1.5	3.1	1.9	1.6	1.4	1.3	1.6	2.0	14.5

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	State
Other NACE activities	1.4	3.1	1.4	1.0	1.0	1.5	1.8	1.2	12.4
No sector given	8.9	19.2	7.2	3.9	6.2	10.0	7.6	6.8	69.8
<b>Total</b>	<b>32.4</b>	<b>70.0</b>	<b>36.7</b>	<b>22.0</b>	<b>27.0</b>	<b>42.0</b>	<b>34.7</b>	<b>27.2</b>	<b>292.0</b>

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

Unemployment by occupational group and region for quarter 1, 2013 is presented in Table 20. Almost a quarter of unemployed persons did not state a previous occupation; for those who did state an occupation, unemployed persons had been mostly employed in skilled trades and elementary occupations. Dublin accounted for the highest number of persons unemployed in each occupational grouping excluding operatives; for operatives, the number was highest in the South East (5,600 unemployed). The Mid-East's share of persons previously employed in skilled trades (24%) was higher than that of any other region; the shares of unemployed persons previously employed in elementary occupations was highest in the Midland and South-West regions.

Table 20. Unemployment by occupational group and region, (000s) Q1 2013

Occupation	Border	Dublin	Mid East	Midland	Mid-West	South East	South West	West	Ireland
Managers	1.2	3.0	1.6	*	*	1.6	1.8	1.3	11.5
Professionals	*	2.6	1.4	*	1.3	1.1	1.6	1.0	10.8
Associate professionals	1.7	6.6	2.5	1.4	1.1	1.5	1.8	1.5	18.1
Administrative & secretarial	1.5	6.4	2.7	1.1	1.6	2.1	1.9	2.0	19.2
Skilled trades	6.7	10.8	8.8	4.3	6.1	8.8	7.6	5.3	58.4
Caring/leisure	1.7	2.0	1.3	1.3	1.5	2.0	1.6	2.0	13.6
Sales & customer service	2.0	5.3	3.3	2.4	2.6	3.7	2.9	1.4	23.5
Operatives	3.5	4.1	3.0	2.8	2.5	5.6	2.6	2.3	26.4
Elementary occupations	4.4	9.9	4.8	3.4	3.5	5.6	5.3	3.5	40.5
No occupation	8.9	19.3	7.2	4.0	6.2	9.9	7.6	6.8	69.9
<b>Total</b>	<b>32.4</b>	<b>70.0</b>	<b>36.7</b>	<b>22.0</b>	<b>27.0</b>	<b>42.0</b>	<b>34.7</b>	<b>27.2</b>	<b>292.0</b>

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

Table 21 shows the distribution of unemployed persons by region and education level. Those with higher secondary education levels accounted for the highest number of unemployed persons in each region in quarter 1, 2013. Unemployed persons from Dublin accounted for the largest numbers for each educational level, although in terms of shares, Dublin was lower than the national average for all educational levels excluding third level honours degree or above; indeed, the South-West region was the only other region to have a higher than average share of persons with a third level honours degree or above while the South-East and West region had the lowest share of unemployed persons at this educational level.

Of all unemployed persons in Ireland who hold lower secondary qualifications or less, the highest shares were located in the Mid-East and West regions (at 32% and 30% respectively).

Table 21. Unemployment by education and region, (000s) Q1 2013

	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Total
No formal/primary	3.2	5.8	3.2	1.9	2.7	5.1	2.5	3.3	27.7
Lower secondary	5.8	12.1	7.7	4.3	3.9	7.3	5.3	5.1	51.5
Higher secondary	9.3	19.7	8.9	8.0	8.3	12.4	9.6	7.8	84.0
Post leaving cert	6.1	11.6	8.0	3.3	5.1	7.7	6.7	3.3	51.7
3 <sup>rd</sup> level non honours degree	3.1	7.7	4.0	1.8	2.3	4.3	4.6	4.6	32.5
3 <sup>rd</sup> level honours degree or above	3.3	12.0	3.7	2.3	3.3	3.5	5.4	2.3	35.8
Other/not stated	1.6	0.9	1.2	0.4	1.3	1.8	0.6	1.0	8.8
<b>Total</b>	<b>32.4</b>	<b>70.0</b>	<b>36.7</b>	<b>22.0</b>	<b>27.0</b>	<b>42.0</b>	<b>34.7</b>	<b>27.2</b>	<b>292.0</b>

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

### Job seekers with the Public Employment Service (PES)

Table 22 presents data on persons registered with the Public Employment Service (PES) who were seeking employment, in receipt of unemployment benefit (allowance or credits), with previous occupations and who were ready to take up employment in September 2013. There was a similarity in the occupational distributions of job seekers across regions. Similar to the unemployment data, the highest share of job seekers in each region had previously been employed in skilled trades or elementary occupations; those previously employed as managers, professionals and in caring occupations accounted for relatively low shares of jobseekers across the regions.

Dublin accounted for one quarter of all job seekers registered with the PES; its share amongst job seekers who had previously worked as managers, professionals and associate professionals was higher than any other region. The South-West's share of job seekers previously employed in skilled trades and the Mid-West's share previously employed as operatives were higher than any other region.

Table 22. Number of job seekers by occupational group and region, Sep 2013

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	310	1,129	446	169	240	347	340	275	3,257
Professionals	1,052	2,906	918	366	802	1,001	1,158	1,076	9,282
Associate professionals	1,780	5,539	1,908	751	1,381	1,923	2,079	1,602	16,965
Administrative & Secretarial	2,274	5,380	2,454	1,085	1,812	2,528	2,167	1,784	19,487
Skilled Trades	4,573	7,797	3,764	2,180	3,051	5,315	4,793	3,581	35,059
Caring/Leisure	1,746	2,732	1,353	927	1,248	2,000	1,655	1,239	12,901
Sales & Customer Service	1,745	4,056	1,598	987	1,266	2,125	1,915	1,312	15,007
Operatives	3,377	5,967	2,771	1,728	2,790	4,092	3,339	2,630	26,701
Elementary occupations	4,946	8,686	3,594	2,322	3,359	5,843	4,693	3,677	37,129
Other	50	153	57	39	58	72	149	43	622
<b>Total</b>	<b>21,853</b>	<b>44,345</b>	<b>18,863</b>	<b>10,554</b>	<b>16,007</b>	<b>25,246</b>	<b>22,288</b>	<b>17,219</b>	<b>176,410</b>

Source: DSP Client database

### Supply from education and training system

The data on numbers of students enrolled in education and training provides an indication of the supply expected to emerge from the system over the short to medium term. There were over 285,000 students enrolled in further and higher education and training courses in 2012 (Table 23). There were further and higher education enrolments in all regions, although the highest numbers (particularly at third level) were in the Dublin region. Further education and training enrolments were more evenly spread across the regions, with the highest numbers again in the Dublin region.

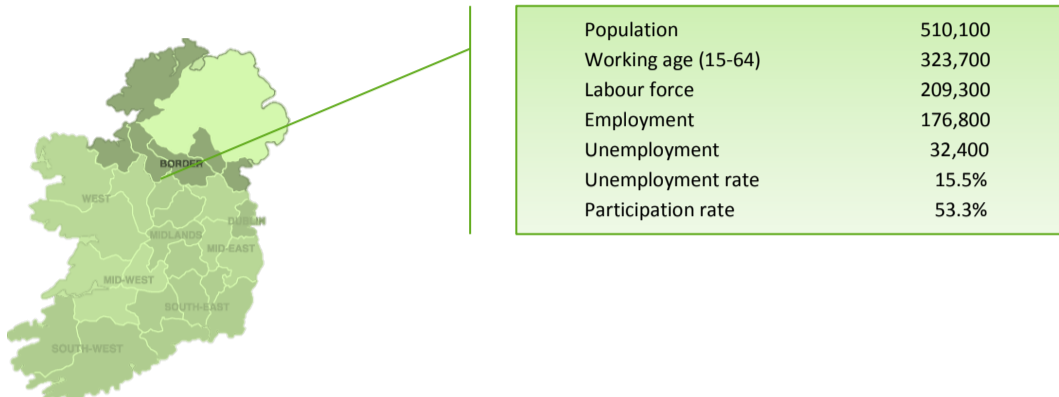
Table 23. Number of students engaged in education and training by region, 2012\*

Region	Border	Dublin	Mid East	Midland	Mid West	South East	South West	West	Ireland
FET (FAS)	7,983	19,717	1,996	3,614	5,118	6,372	7,527	3,851	56,178
FET (PLC)	4,554	12,001	2,094	1,350	2,671	3,767	6,255	2,858	35,550
Undergraduate	12,441	63,024	7,347	4,206	17,128	11,611	24,391	18,715	158,863
Postgraduate	896	19,370	2,055	279	3,087	950	4,541	3,553	34,731
<b>Total</b>	<b>25,874</b>	<b>114,112</b>	<b>13,492</b>	<b>9,449</b>	<b>28,004</b>	<b>22,700</b>	<b>42,714</b>	<b>28,977</b>	<b>285,322</b>

Source: DES, HEA, FÁS/SOLAS

\*Higher education enrolments refer to the 2011/2012 academic year ; PLC enrolments to the 2012/2013 academic year. FÁS enrolments refer to the 2012 calendar year.

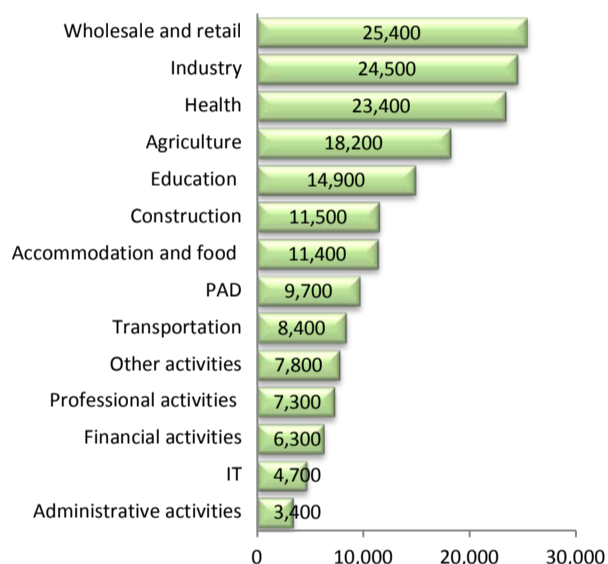
## 2. Border



### Employment by sector

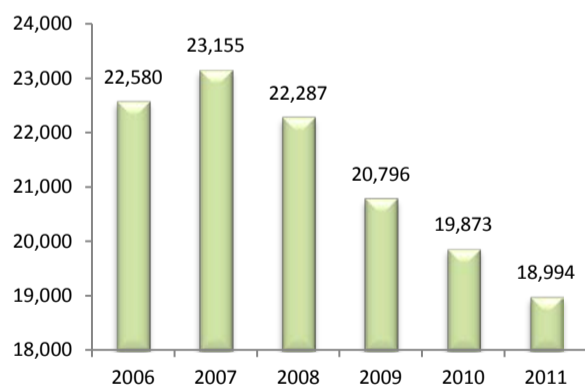
- In quarter 1 2013, the wholesale/retail and industry sectors were the largest employers, with 28% of the total workforce in the Border region
- The public sector combining PAD, health and education employed 48,000 persons, or almost 27% of the region's employment with agriculture accounting for a further 8%
- High value added sectors (professional, financial and IT activities) accounted for a combined share of 10% of all employed persons in the region.

Figure 2.1 Employment by broad economic sector (Border), Q1 2013



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

Figure 2.2 Active enterprises\* (Border)



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

\*Excludes public sector and agriculture

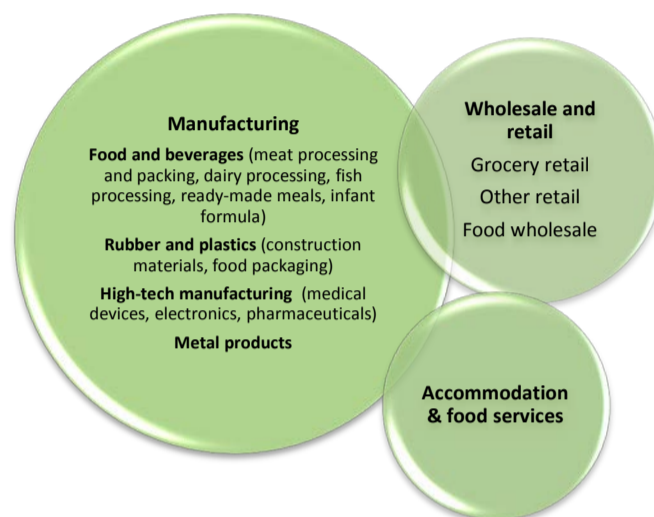
### Active enterprises

- In 2011 there were almost 19,000 active enterprises outside agriculture and the public sector in the Border region
- The number of active enterprises has continued to decline from its peak of 23,155 in 2007
- The majority (91%) of active enterprises employed fewer than 10 persons in 2011; less than 1% employed 250 persons or more
- Wholesale/retail had the largest number of enterprises at almost 5,500, followed by construction (approx. 4,000)
- The number of active enterprises in construction declined by approximately 500 between 2010 and 2011.

Figure 2.3 Sectors with largest enterprises (Border), 2012

**Medium to large enterprises by sector**

- Outside the public sector, the highest number of medium to large enterprises (employing 50 persons or more) in the Border region is found in manufacturing, wholesale/retail and accommodation and food services
- There is also a number of medium to large sized enterprises engaged in the manufacture of metal products.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 2.4a Industrial units (Border)

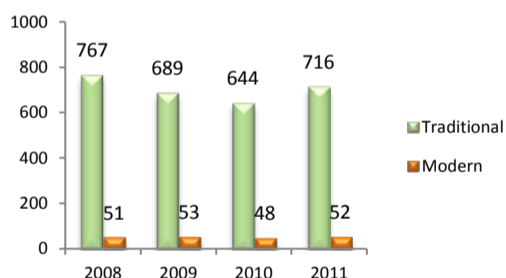
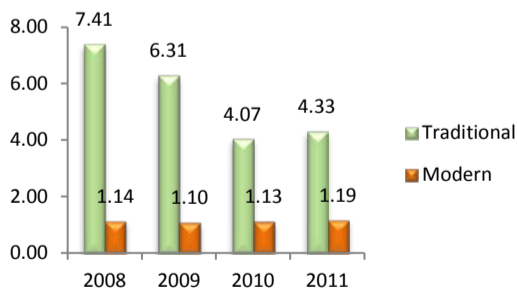


Figure 2.4b Gross output in industrial units (Border), € billion



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

**Industrial activity**

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



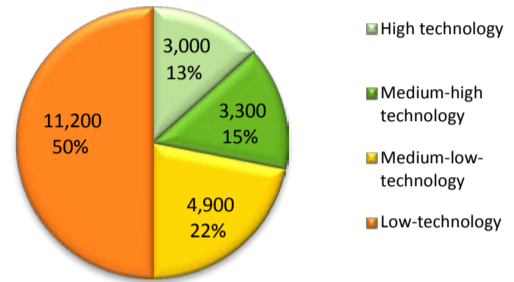


Border

### Manufacturing employment

- In quarter 1 2013, 22,400 persons in the Border region were employed in manufacturing
- One half were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.); 22% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) combined accounted for 28%
- The Border was the only region where low tech manufacturing reached 50% of total regional manufacturing employment.

Figure 2.5 Manufacturing employment (Border), Q1 2013



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

Figure 2.6 Employment by broad occupation (Border), Q1 2013

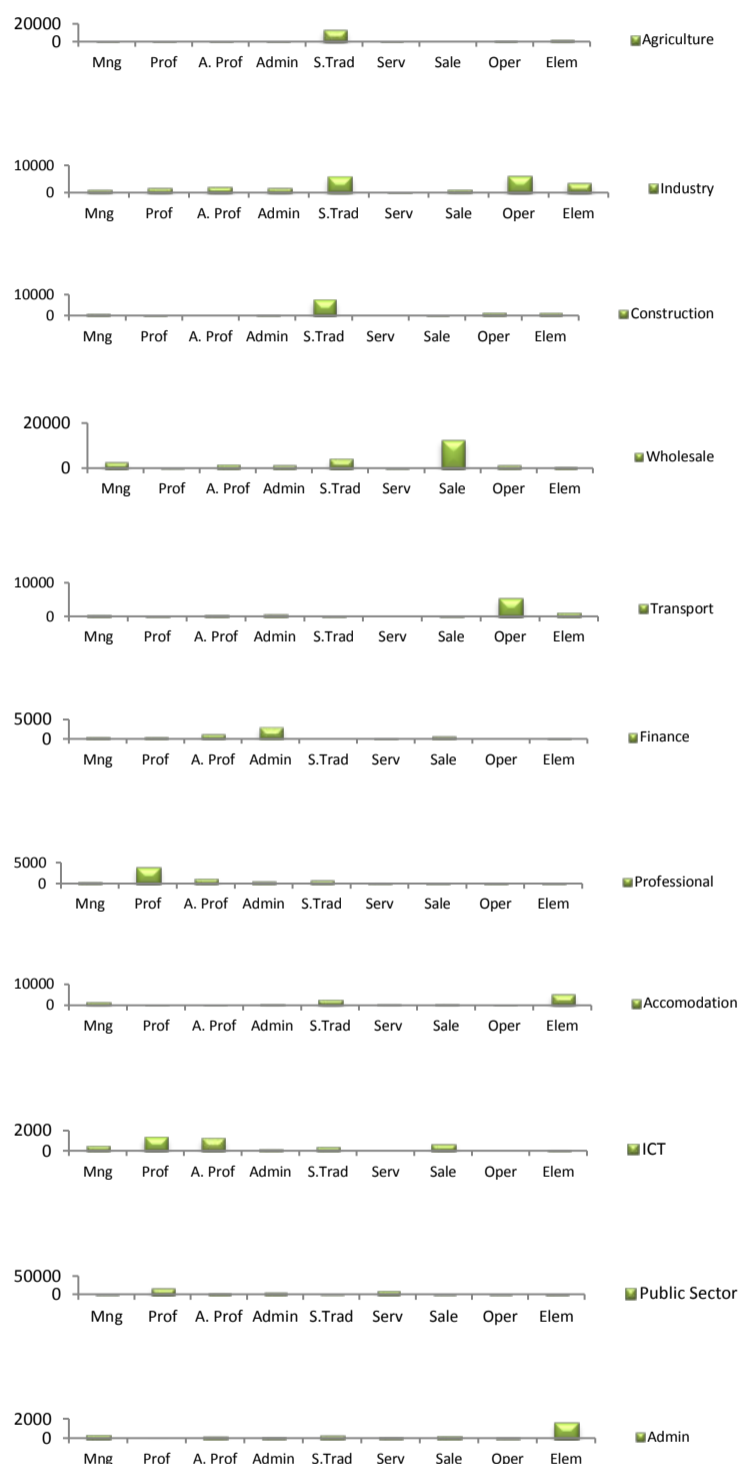


Source: Analysis by SOLAS (SLMRU) based on CSO data

### Employment by occupation

- In quarter 1 2013, professional occupations accounted for 16% of all those employed in the Border region
- Total white collar occupations (professionals, associate professionals, managers and admin) accounted for almost 40% of persons in employment in the Border; this is the lowest share for white collar employment observed across all regions; a substantial share of white collar workers were employed in the public sector
- Skilled trades occupations totalled 37,800 persons or 21% of the total workforce in the Border region; just over one third of these were farmers
- Elementary workers and operatives accounted for 11% and 9% of the total regional employment respectively.

Figure 2.7 Employment by broad occupation and sector (Border) (000s), Q1 2013



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

### Employment by occupation and sector

- In quarter 1 2013, most persons employed in industry were either in operative and elementary occupations or in skilled trades; most of the remainder were in white collar jobs (as managers, professionals, associate professionals or in admin)
- Low skilled persons (working in sales, operative or elementary occupations) dominate in four sectors: wholesale and retail, transport, accommodation/food services and administrative/support services
- Professionals and associate professionals made up the majority of those working in the public sector, as well as comprising a large share of the professional services & ICT sectors.
- Managers were primarily employed in one of three sectors: wholesale/retail, accommodation and food (proprietors), and admin services
- Within occupational groups, the highest employment was in the following occupations
  - **Managers:** functional managers
  - **Professionals:** teachers, nurses, and accountants
  - **Associate professionals:** business sales executives, sales accounts managers, and gardaí
  - **Administrative and secretarial:** government clerks, PAs, and finance admin occupations (e.g. bank and wages clerks)
  - **Skilled trades:** farmers, fitters, electricians, chefs and mechanics
  - **Caring and services occupations:** childminders, care workers, and hairdressers and beauticians
  - **Sales:** sales and retail assistants
  - **Operatives:** drivers, assemblers and routine operatives, and food processing operatives
  - **Elementary:** elementary construction workers, cleaners, catering staff.

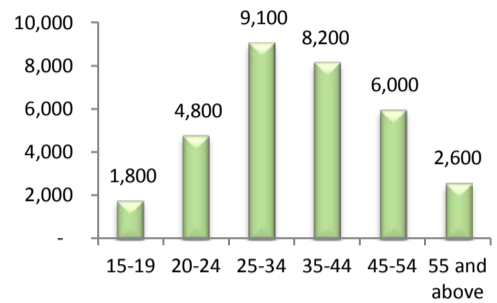


## Border

### Unemployment

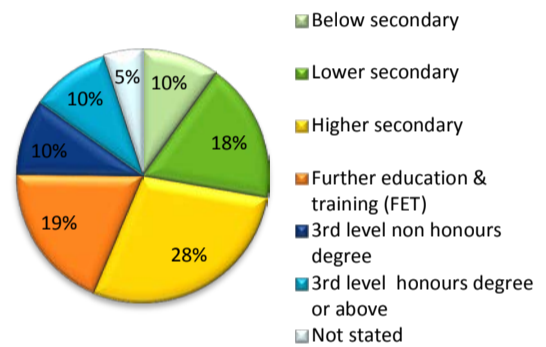
- In August 2013, there were almost 62,000 persons on the Live Register in the Border region (a decline of 5% since August 2012); of these, 18% were under 25 and 61% were male
- In quarter 1 2013, there were over 32,000 unemployed persons in ILO terms (Figure 2.8)
- **Age:** 20% of all unemployed in this region were aged under 25, higher than the national average of 18%; those aged 25-34 accounted for the largest share at 28%
- **Education:** 28% of those unemployed in this region had attained lower secondary education or less; 10% held a third level honours degree
- **Sector:** one fifth of all unemployed persons had previously been employed in the construction sector, with a further 22% from industry and wholesale/retail combined
- **Occupation:** unemployed persons in this region were previously employed primarily in skilled trades, elementary occupations and as operatives.

Figure 2.8 Unemployment by age (Border), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 2.9 Unemployment by education (Border), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 2.10a PES job seekers (Border), Sept 2013

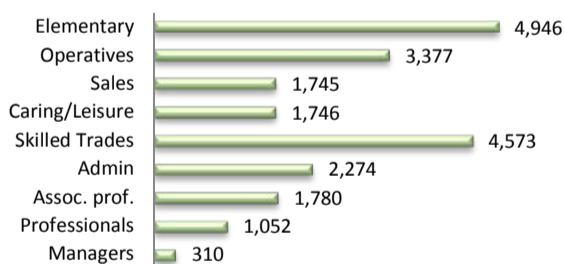
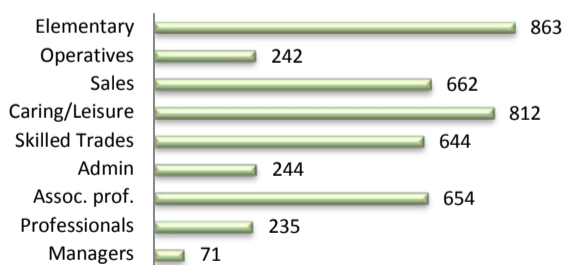


Figure 2.10b PES vacancies (Border), Jan-Sept 2013

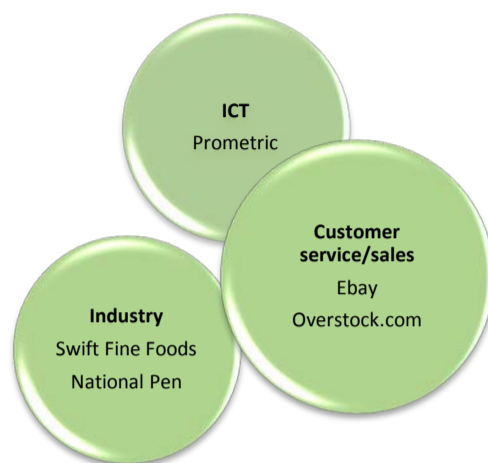


Source: Analysis by SOLAS (SLMRU) based on DSP data

### PES job seekers and vacancies

- In September 2013, almost 22,000 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (in process plant and construction occupations), skilled trades (carpenters, bricklayers, plasterers) and as operatives (process operatives, HGV/van drivers)
- Between Jan-Sept 2013, 4,400 vacancies were advertised through DSP Jobs Ireland; the highest number of vacancies was in elementary (security guards, cleaners, kitchen assistants, waiters), caring (care workers, nursing assistants), sales (collector salespersons, sales assistants) and associate professional (business sales executives, IT user support technicians) occupations.

Figure 2.11 Job creation announcements (Border), 2013

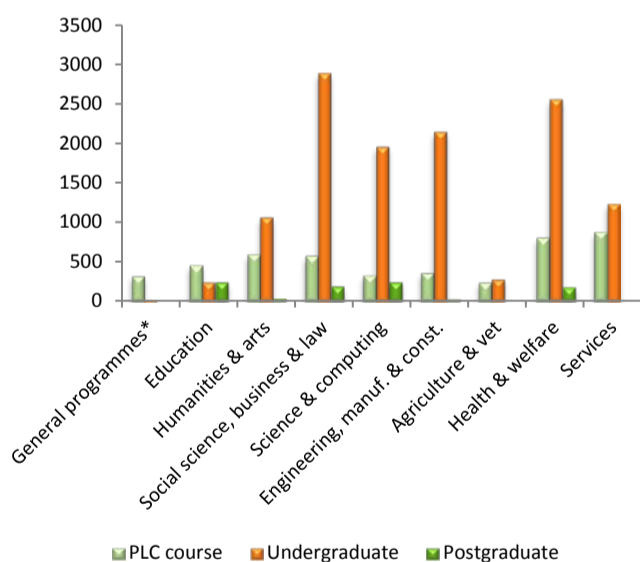


Source: Analysis by SOLAS (SLMRU) based on various sources

### Employment growth and job creation

- An overall increase in employment of 1% occurred between q1 2012 and q1 2013 for the Border region; employment in agriculture grew strongly followed by ICT, finance, and professional activities; in contrast, employment in administrative/support activities declined by 44%, the largest percentage decline for this sector across all regions
- Job announcements for the Border region were primarily for roles in customer services and sales
- There have also been indications of job creation in food manufacturing and in the ICT sector.

Figure 2.12 PLC course & higher education enrolments (Border), 2012



Source: DES, HEA

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

### Education and training enrolments

- There were over 16,000 student enrolments in the Border region in selected further/higher education and training in 2012; of these, there were
  - almost 4,000 PLC enrolments
  - over 11,000 undergraduates
  - almost 900 at postgraduate level
- In the PLC sector, the highest number of enrolments was for services courses (e.g. hairdressing, sport/recreation), which accounted for almost a fifth of total PLC enrolments; this was followed by health and welfare, which accounted for almost a further fifth
- At undergraduate level, the highest number of enrolments was in social science, business and law, making up almost a quarter; a further fifth were in health and welfare
- More than one half of all postgraduate enrolments were either in education or in science/computing.



## Border

### Census (2011) data by county

Table 2.1. Persons at work and unemployed in the Border region by county, Census 2011

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

Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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

### 3. Dublin



#### Employment by sector

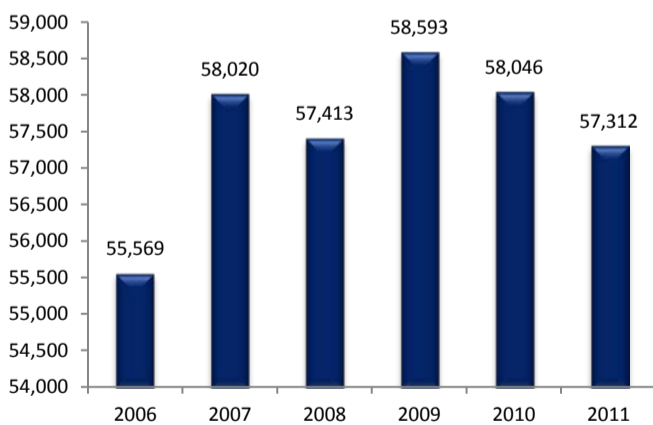
- In quarter 1 2013, employment in the public sector (PAD, health and education) accounted for over a quarter of all those employed in the Dublin region
- Wholesale/retail was the second largest employer in the Dublin region with almost 79,000 persons or 14% of all employment in Dublin
- High value added sectors (professional, financial and IT activities) accounted for almost 25% of the region’s employment.

Figure 3.1 Employment by broad economic sector (Dublin), Q1 2013



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

Figure 3.2 Active enterprises\* (Dublin)



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

\* Excludes public sector and agriculture

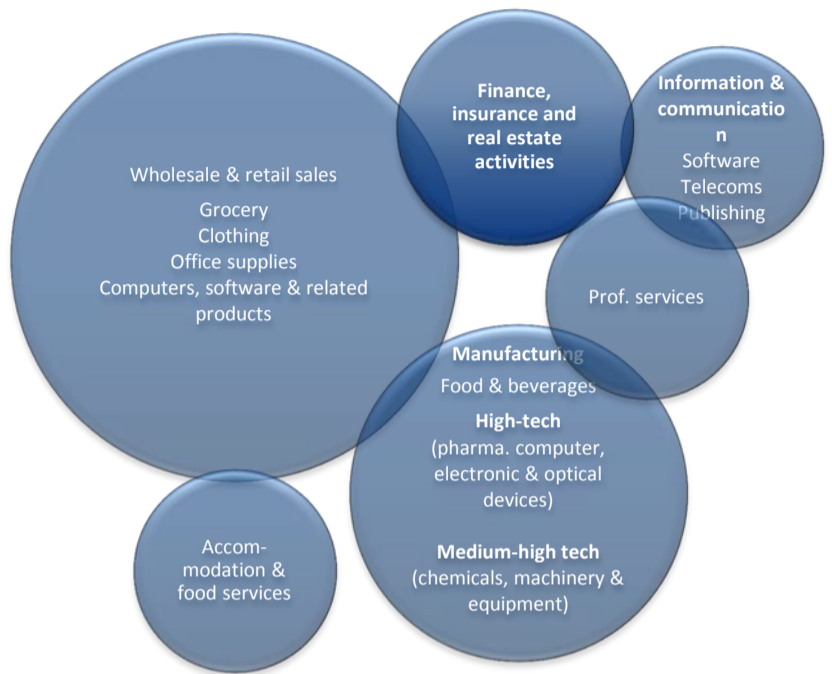
#### Active enterprises

- In 2011, there were over 57,000 active enterprises outside agriculture and the public sector in the Dublin region
- The number of active enterprises declined by almost 1,300 between 2009 and 2011; despite this, the number was broadly in line with 2008
- Less than 0.5% of active enterprises employed 250 persons or more; almost 90% employed fewer than 10 persons
- Professional activities had the largest number of active enterprises (13,000), followed by wholesale and retail at just over 11,000.

Figure 3.3 Sectors with largest enterprises (Dublin), 2012

**Medium to large enterprises by sector**

- The highest number of medium to large enterprises (employing at least 50 persons) in the Dublin region is found in wholesale/retail and manufacturing
- There are also some medium to large companies in finance, ICT, professional services, and accommodation/food service activities.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 3.4a Industrial units (Dublin)

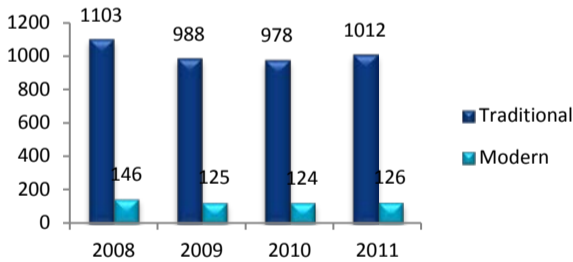
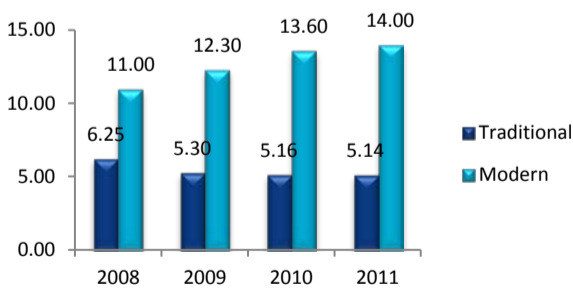


Figure 3.4b Gross output in industrial units (Dublin), € billion



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

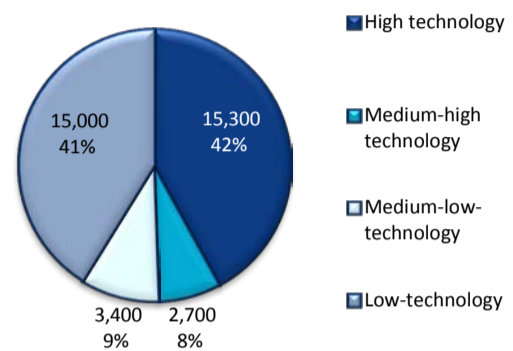
**Industrial activity**

- In 2011, 89% of all industrial units (manufacturing, energy and utilities) in the Dublin region were in the traditional sector
- The number of industrial units increased in both sectors (traditional and modern) between 2010 and 2011, a change in the pattern of decline during the previous 2 years
- While just over 10% of industrial units were in the modern industry sector, they accounted for 73% of the regional gross industrial output value in 2011
- The value of gross output in the modern sector increased from €13.6 billion to €14 billion between 2010 and 2011 while the traditional sector remained almost unchanged.

### Manufacturing employment

- In quarter 1 2012, 36,500 persons in the Dublin region were employed in manufacturing
- Combined, the medium-high and high tech manufacturing accounted for a half of all manufacturing employment in this region; less than 10% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) with a further 41% in low-tech manufacturing (e.g. food processing, wood, printing etc.)
- Dublin was the only region where high tech manufacturing represented over 40% of total regional manufacturing employment.

Figure 3.5 Manufacturing employment (Dublin), Q1 2013



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

Figure 3.6 Employment by broad occupation (Dublin), Q1 2013



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

### Employment by occupation

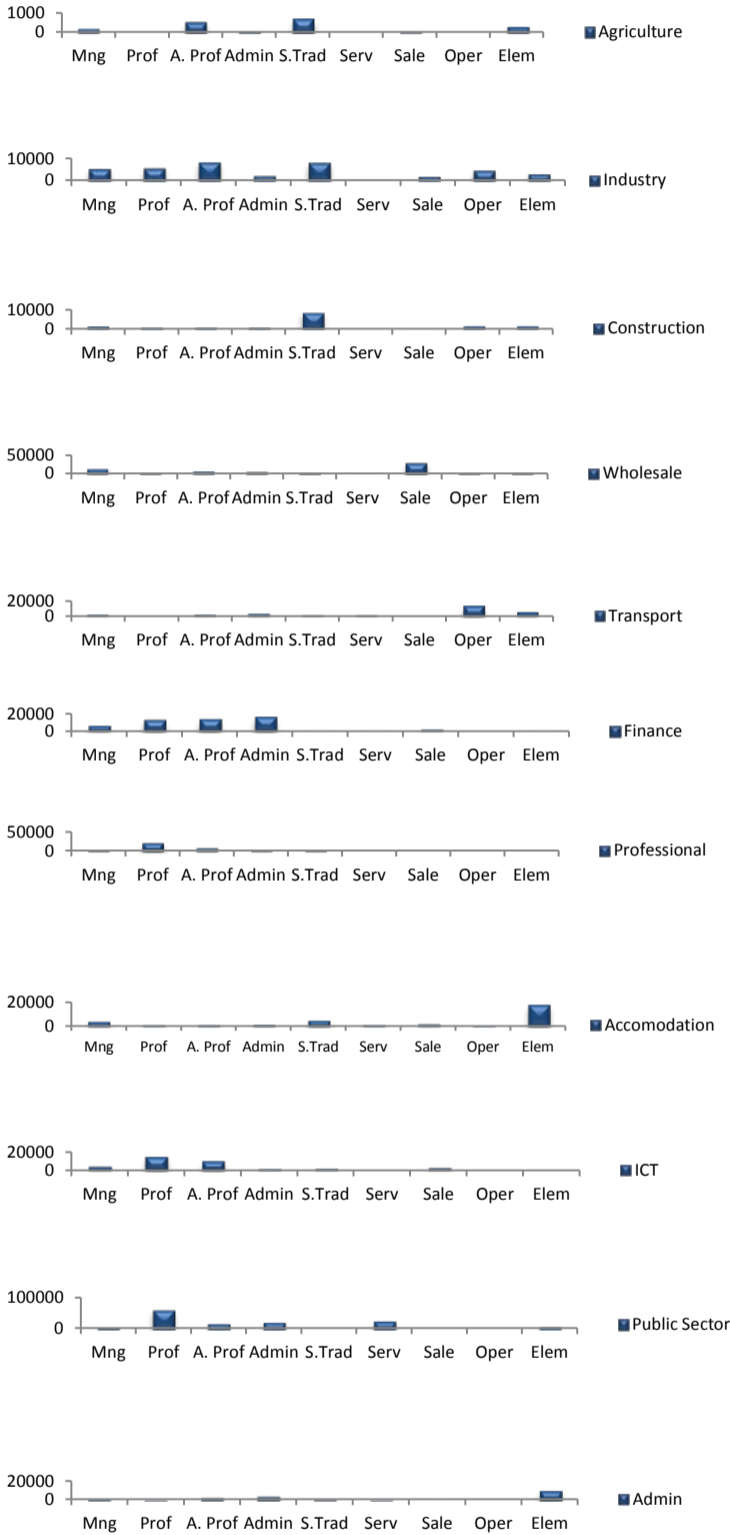
- In quarter 1 2013, 23% of all those employed in the Dublin region were employed in the professional occupations - the largest share compared with other regions; other white collar workers (associate professionals, managers and admin) combined accounted for a further 38%
- Skilled trades occupations employed over 40,000 persons or 7% of all those employed in the region, by far the lowest share in this occupation when compared to all other regions
- Elementary and operative occupations accounted for 16% of the total employment in the Dublin region.





Dublin

Figure 3.7 Employment by broad occupation and sector (Dublin) (000s), Q1 2013



Source: SLMRU analysis of CSO data

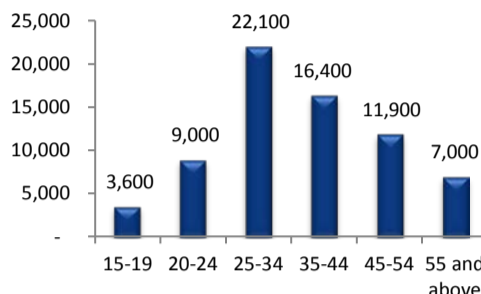
### Employment by occupation and sector

- In quarter 1 2013, high skilled workers (managers, professionals and associate professionals) made up the larger share (approximately 89% of total sectoral employment) of those in ICT and professional services; they also made up a significant share of those in the public and financial sectors (between 57% and 62%)
- Industry had the most even spread of occupations: with the exception of services occupations, all other occupation types accounted for between 6% and 20% of total sectoral employment each
- Low skilled workers (i.e. elementary, operative and sales occupations) accounted for a larger share of employment in the transport, accommodation/food services, and wholesale/retail sectors
- Within occupational groups, the highest employment was found in the following occupations:
  - **Managers:** functional managers, shopkeepers/proprietors, managers in hospitality/leisure services
  - **Professionals:** IT professionals, teachers, nurses, accountants, doctors
  - **Associate professionals:** business sales executives, sales accounts managers, financial accounts managers
  - **Admin/secretarial:** Government clerks, personal assistants, and finance admin occupations (e.g. bank clerks, wages clerks)
  - **Skilled trades:** chefs, fitters, electricians
  - **Services:** care workers, hairdressers, childminders
  - **Sales:** sales and retail assistants
  - **Operatives:** taxi drivers, truck/van drivers
  - **Elementary:** cleaners, catering staff.

### Unemployment

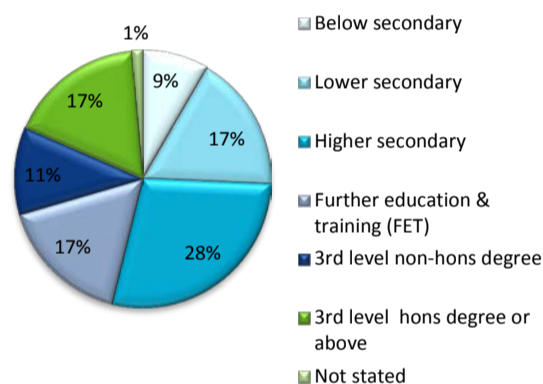
- In August 2013, there were 106,000 persons on the Live Register in the Dublin region (a decline of 4% on August 2012); of these, 16% were under 25 and 63% were male
- In quarter 1 2013, there were almost 70,000 unemployed persons in the Dublin region in ILO terms (Figure 3.8)
- **Age:** Dublin had the highest share of unemployed persons aged 25-34 (32%); 18% were under 25
- **Education:** Dublin had the highest share of unemployed persons with at least a third level honours degree (17%) and a lower than average share with lower secondary education or less
- **Sector:** Unemployment was primarily from sectors such as construction and wholesale/retail; Dublin had a higher share than average of persons previously employed in ICT, finance, and professional activities
- **Occupation:** Dublin had a higher share of persons previously employed in associate professional and admin occupations than other regions, and a lower than average share of persons previously employed in skilled trades and as operatives.

Figure 3.8 Unemployment by age (Dublin), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 3.9 Unemployment by education (Dublin), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 3.10a PES job seekers (Dublin), Sept 2013

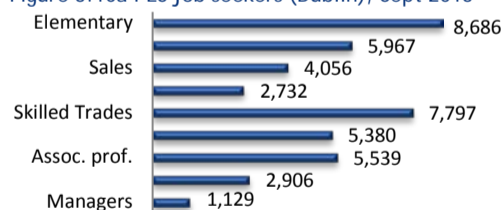
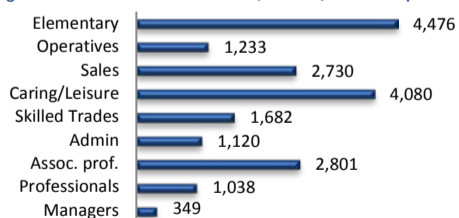


Figure 3.10b PES vacancies (Dublin), Jan-Sept 2013



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

### PES job seekers and vacancies

- In September 2013, more than 44,000 job seekers were registered with the PES; the highest number had previously worked in elementary occupations (construction, process and elementary storage), skilled trades (carpenters, electricians, painters) and operatives (process operatives, drivers)
- Between Jan - Sept 2013, over 19,500 vacancies were advertised through DSP Jobs Ireland; the highest number was for elementary occupations (security guards, catering assistants, cleaners), caring positions (care workers, nursing assistants) sales associate professionals (business sales executives, IT support technicians), and sales staff (credit collectors and sales assistants).



Figure 3.11 Job creation announcements (Dublin), 2013

**Employment growth and job creation**

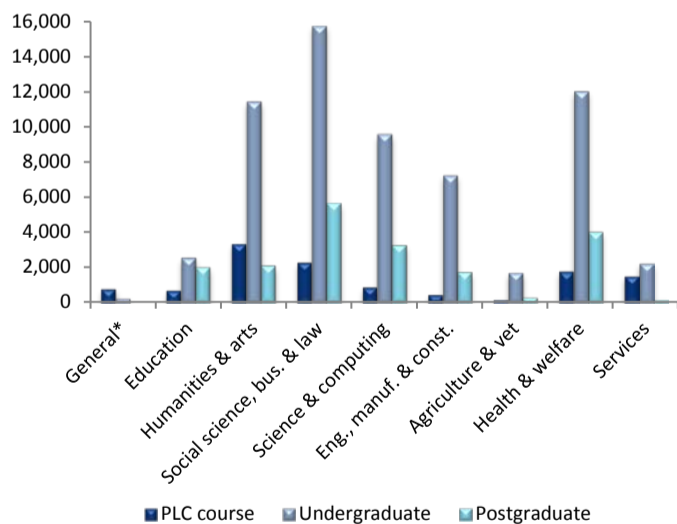
Over the period quarter 1 2012 to quarter 1 2013, employment grew by 1%, in line with the national average; however:

- employment in PAD increased by 4% - the only region where an increase in employment in PAD occurred; employment levels also grew for accommodation/food services, professional activities and health
- education employment declined by 14%; only one other region (South-East) experienced a decline in this sector; there were also declines in the number employed in the construction (-16%), ICT (-7%), and transport (-3%) sectors; despite the decline in ICT employment levels, they remained above those of q1 2011.
- Recent job announcements suggest there will be job opportunities in the ICT and business services sectors in the short-medium term; many roles will require a blend of IT and business/sales skills, or experience in HR, finance and customer care.



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

Figure 3.12 PLC course & higher education enrolments (Dublin), 2012



Source: DES, HEA

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

**Education and training enrolments**

- In 2012, there were almost 95,000 student enrolments in the Dublin region
  - approximately 12,000 PLC course enrolments
  - approximately 63,000 undergraduates
  - more than 19,000 at postgraduate level
- The highest number of PLC enrolments was in humanities/arts (over 3,300 learners, almost half of which were in media production), followed by social science, business and law; combined these two fields accounted for almost one half of all PLC enrolments
- One quarter of undergraduates were in social science, business & law (almost 16,000 learners, mostly in business related areas); a further fifth were either in health & welfare or humanities & arts
- Two thirds of postgraduate enrolments were in one of three fields: social science, business & law (29%), health and welfare (21%), and science and computing (17%).

## Census (2011) data by county

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

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

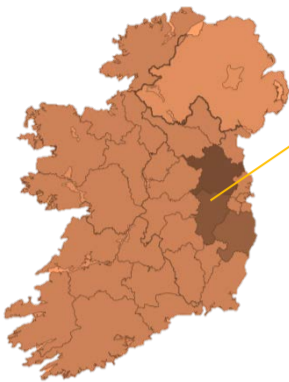
Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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

## 4. Mid East



Population	541,542
Working age (15-64)	354,402
Labour force	257,300
Employment	220,600
Unemployment	36,700
Unemployment rate	14.3%
Participation rate	60.8%

### Employment by sector

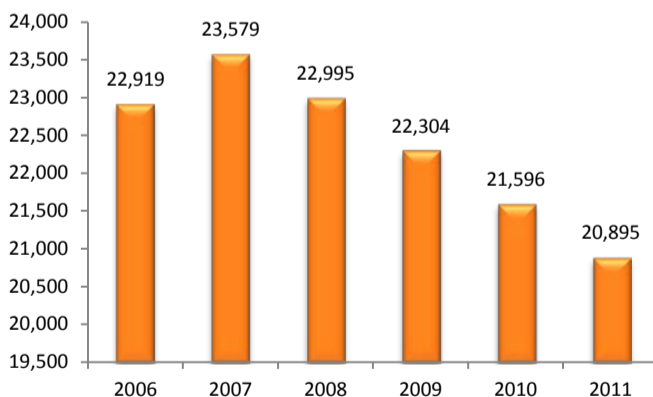
- In quarter 1 2013, wholesale/retail and industry accounted for over a quarter (28%) of employment in the Mid East
- Employment in the public sector (health, education and PAD) accounted for almost a further quarter of the Mid East workforce
- High value added sectors (professional, financial and IT activities) accounted for 16% of the region's employment

Figure 4.1 Employment by broad economic sector (Mid East), Q1 2013



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

Figure 4.2 Active enterprises (Mid East)



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

\* Excludes public sector & agriculture

### Active enterprises

- In 2011, there were almost 21,000 active enterprises outside agriculture and the public sector in the Mid-East region
- The number of active enterprises continued to decline from its peak of 23,579 in 2007 to 20,895 in 2011
- Almost 93% of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Wholesale/retail and construction had the largest number of active enterprises with approximately 4,600 each, followed by professional activities (3,200 enterprises)
- The number of active enterprises in construction declined by approximately 700 between 2010 and 2011.

Figure 4.3 Sectors with largest enterprises (Mid East), 2012

#### Medium to large enterprises by sector

- The highest number of medium to large enterprises (employing 50 persons or more) in the Mid East region is found in manufacturing, particularly in food processing, high tech and medium-high tech manufacturing (e.g. pharmaceuticals, chemicals, etc.) and rubber/plastic products
- There are also some medium to large enterprises in wholesale/retail and accommodation/food services.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 4.4a Industrial units (Mid East)

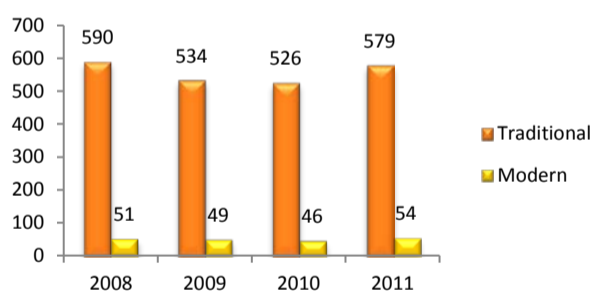
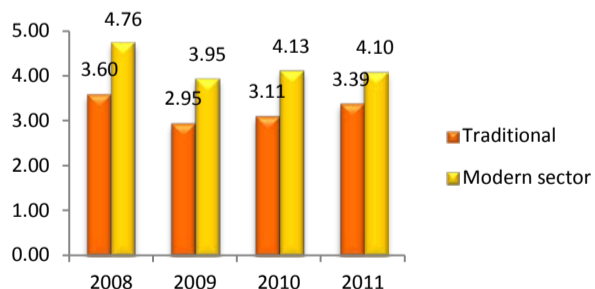


Figure 4.4b Gross output in industrial units (Mid East), € billion



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

#### Industrial activity

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

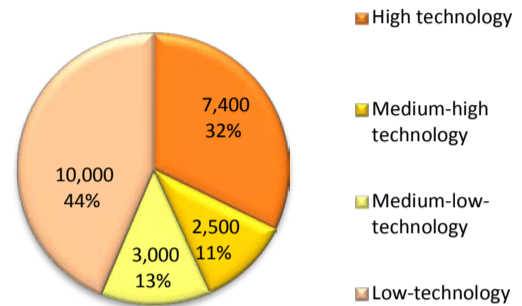


## Mid East

### Manufacturing employment

- In quarter 1 2013, 23,000 persons in the Mid East region were employed in manufacturing
- At 32%, the share of Mid East manufacturing employment in the high tech sector (e.g. pharmaceuticals, electronics, optical products etc.) was above the national average (27%)
- Almost a further quarter were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) and medium-high tech (e.g. chemicals, electrical, transport equipment etc.) combined
- At 44%, the share employed in low-tech manufacturing (e.g. food processing, wood, printing etc.) was also above the national average (38%).

Figure 4.5 Manufacturing employment (Mid East), Q1 2013



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

Figure 4.6 Employment by broad occupation (Mid East), Q1 2013



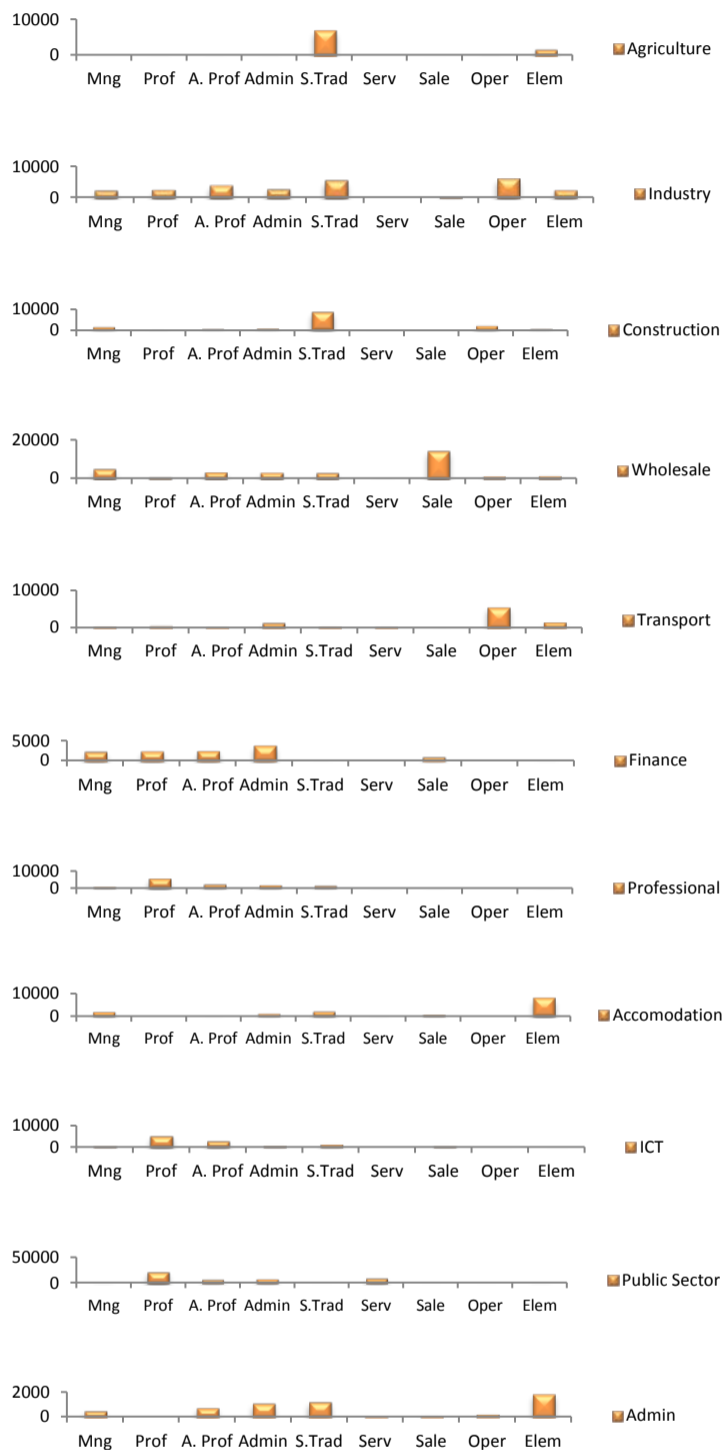
Source: Analysis by SOLAS (SLMRU) based on CSO data

### Employment by occupation

- In quarter 1 2013, white collar occupations (managers, professionals, associate professionals and admin) accounted for 52% of all employment in the Mid East region; over a third of this was in the public sector (PAD, education and health)
- Skilled trades occupations employed almost 34,000 persons or 15% of the total workforce in the Mid-East Region; of these approximately one fifth were farmers
- Operatives and elementary workers combined, employed 38,000 persons or 17% of the total workforce.



Figure 4.7 Employment by broad occupation and sector (Mid East) (000s), Q1 2013



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

#### Employment by occupation and sector

- In quarter 1 2013, one third of employment in industry in the Mid-East was in low skilled occupations (operatives, elementary and sales workers); almost one half were in white collar occupations (managers, professionals, associate professionals and secretarial/admin staff)
- In wholesale/retail, transport and accommodation/food services, low skilled occupations accounted for at least half of total employment; the wholesale/retail and accommodation/food services sectors also had relatively high shares of employment in managerial occupations
- High skilled occupations (managers, professionals, associate professionals) dominated in four sectors: ICT, professional services, finance/insurance and the public sector
- Within occupational groups, the highest employment was found in the following occupations:
  - Managers: functional managers, managers in wholesale/retail
  - Professionals: teachers, nurses, IT professionals, accountants
  - Associate professionals: business sales executives, sales accounts managers, gardaí
  - Secretarial/admin: personal assistants, and finance admin occupations (e.g. bank clerks, wages clerks), Government clerks
  - Skilled trades: farmers, electricians, metal working production and maintenance fitters
  - Services: care workers, childminders, hairdressers
  - Sales: retail sales assistants
  - Operatives: taxi drivers, truck drivers, food process operatives
  - Elementary: catering staff, construction workers, cleaners.



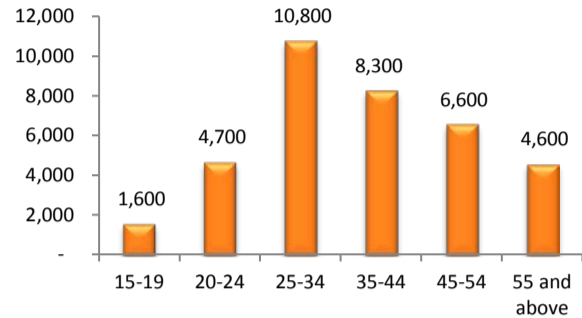


## Mid East

### Unemployment

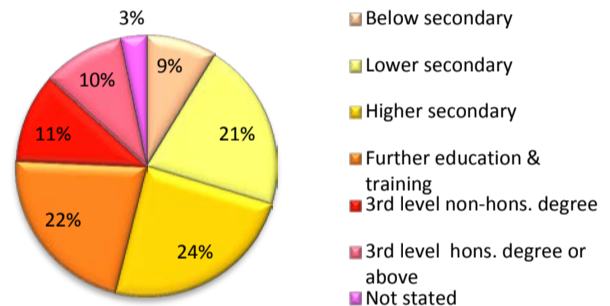
- In August 2013, there were 42,200 persons on the Live Register in the Mid East region (a decline of 3% on August 2012); of these, 16% were under 25 and 60% were male
- In quarter 1 2013, there were 36,700 unemployed persons in the Mid East region in ILO terms (Figure 4.8)
- Age:** at 17% the Mid-East had a slightly lower than average share of unemployed persons aged under 25 (compared to 18% nationally); it also had one of the highest shares of persons unemployed aged 55 and over (13%, compared to 11% nationally)
- Education:** 30% of unemployed persons in this region had achieved lower secondary education or less - one of the highest shares of all regions
- Sector:** those previously employed in industry or construction combined accounted for 46% of unemployed persons
- Occupation:** this region had the highest share of persons previously employed in skilled trades

Figure 4.8 Unemployment by age (Mid East), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 4.9 Unemployment by education (Mid East), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 4.10a PES job seekers (Mid East), Sept 2013

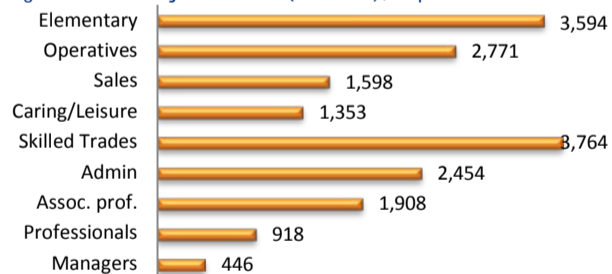
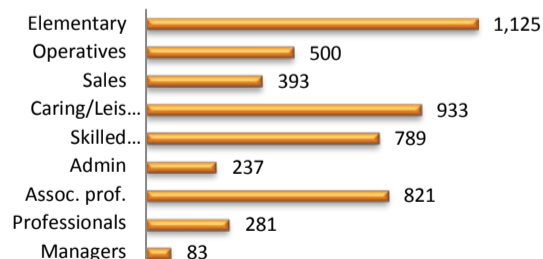


Figure 4.10b PES vacancies (Mid East), Jan-Sept 2013



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

### PES job seekers and vacancies

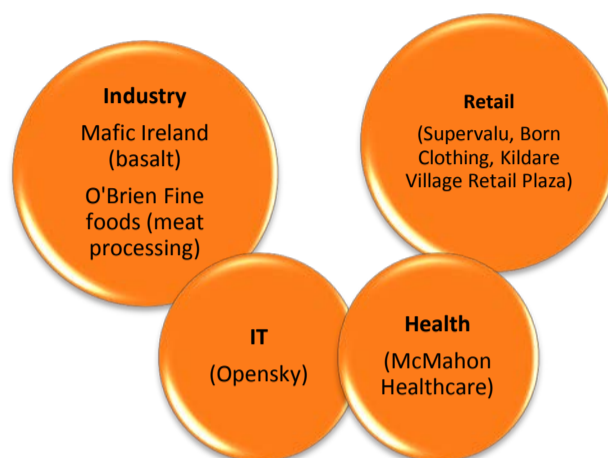
- In September 2013, almost 19,000 job seekers were registered with the PES; the highest number had previously worked in skilled trades (carpenters, electricians), elementary occupations (construction, process plant) and as operatives (process, HGV/van drivers)
- Between Jan - Sept 2013, over 5,100 vacancies were advertised through DSP Jobs Ireland, making up 10% of all notified vacancies; the highest number of vacancies was for elementary occupations (kitchen and catering assistants, waiters, security guards and cleaners), caring (care workers, home carers) associate professionals (IT support technicians, business sales executives and electrical/electronic technicians), and skilled trades (chefs and butchers).



### Employment growth and job creation

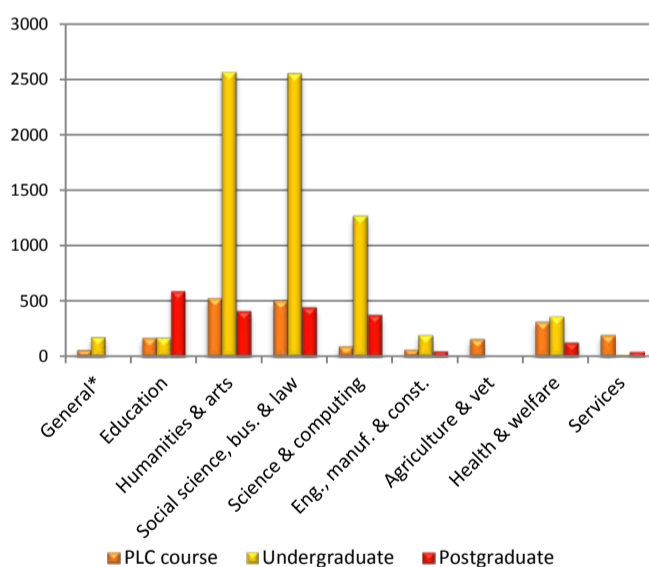
- Over the period quarter 1 2012 to quarter 1 2013, employment declined by 4%; this was one of only two regions to experience a decline in employment levels in this period
- The Mid East region experienced declines in employment in half of the sectors including health, financial activities and industry
- This region had the largest percentage increase in employment in the accommodation/food services sector at 25%; there were also increases in agriculture employment (+23%) and transport (+19%)
- Recent job announcements suggest that, over the short to medium term, job opportunities will arise primarily in IT, industry and retail; there will also be some job opportunities in the health care sector in nursing home settings.

Figure 4.11 Job creation announcements (Mid East), 2013



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

Figure 4.12 PLC course & higher education enrolments (Mid East), 2012



Source: DES, HEA

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

### Education and training enrolments

- There were approximately 11,500 students in selected further/higher education and training in the Mid East region in 2012:
  - over 2,000 PLC enrolments
  - almost 7,500 undergraduates
  - 2,000 at postgraduate level
- The highest number of PLC enrolments were in humanities/arts and social science, business & law, each accounting for over 500 learners; combined these two fields accounted for one half of PLC enrolments; health and welfare enrolments accounted for a further 15% (or over 300 learners)
- More than two thirds of undergraduate enrolments were in either humanities/arts or in social science, business & law; a further 17% (or 1,300 learners) were in science and computing
- At postgraduate level, the highest number of enrolments was in education (making up 29%, or almost 600 learners), followed by social science, business and law (22%, or over 400 learners).



## Mid East

### Census (2011) data by county

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

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

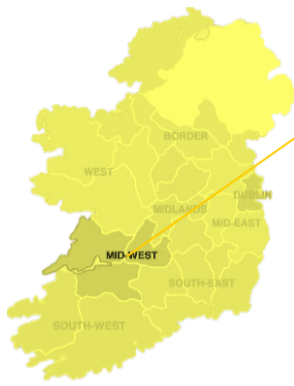
Source: CSO Census 2011

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

#### Key points from Census 2011

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

## 5. Mid West

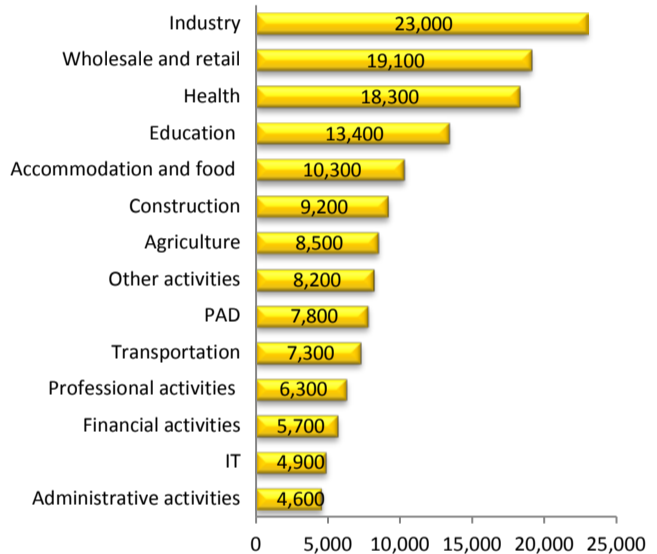


Population	378,000
Working age (15-64)	246,600
Labour force	173,500
Employment	146,500
Unemployment	27,000
Unemployment rate	15.6%
Participation rate	58.6%

### Employment by sector

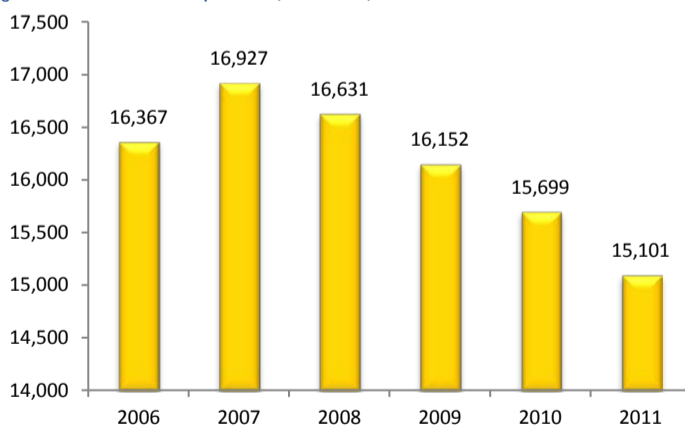
- In quarter 1 2013, industry and wholesale/retail accounted for almost 30% of the workforce in the Mid West region
- Public sector employment (PAD, health and education) reached almost 40,000, amounting to more than a further quarter of the Mid West workforce
- High value added sectors (professional, financial and IT activities combined) accounted for almost 12% of the region's employment.

Figure 5.1 Employment by broad economic sector (Mid West), Q1 2013



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

Figure 5.2 Active enterprises\* (Mid West)



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

\* Excludes public sector & agriculture

### Active enterprises

- In 2011, there were approximately 15,000 active enterprises outside agriculture and the public sector in the Mid West region
- Since 2007, there has been a steady decline in the number of enterprises in this region
- Just over 92% of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Wholesale/retail and construction had the largest numbers of active enterprises, with approximately 4,500 and 3,000 respectively
- Between 2010 and 2011, the number of active enterprises in construction declined by almost 300, continuing the decline of 400 observed the preceding year (2009-2010).

Figure 5.3 Sectors with largest enterprises (Mid West), 2012

**Medium to large enterprises by sector**

- The highest number of medium to large enterprises (employing at least 50 persons) in the Mid West region is found in manufacturing, particularly for food/beverages and high tech products and, to a lesser extent, fabricated metal and medium-high tech products
- There are also some medium to large enterprises in wholesale/retail, accommodation/food services, professional services and admin/support.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 5.4a Industrial units (Mid West)

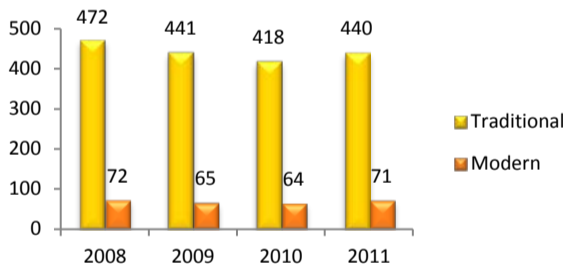
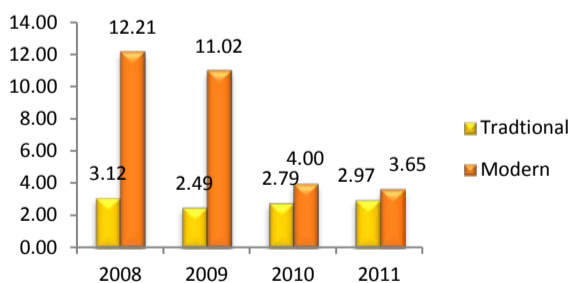


Figure 5.4b Gross output in industrial units (Mid West), € billion



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

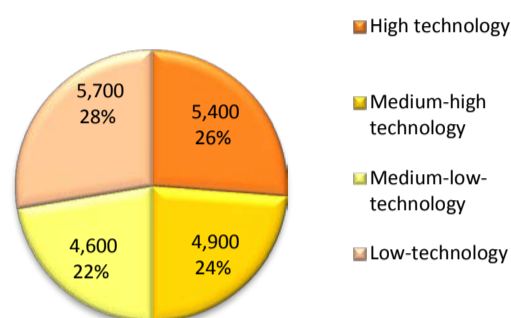
**Industrial activity**

- In 2011, 86% of all industrial units (manufacturing, energy and utilities) in the Mid West region were in the traditional sector
- The number of industrial units increased in 2011 for both sectors (modern and traditional) bringing figures broadly in line with those in 2009; this is the first increase since the economic downturn
- Although it accounted for only 14% of all industrial units, the modern industry sector produced over 50% of the region's gross industrial output value in 2011
- The value of gross output in the traditional sector increased between 2010 and 2011
- However, despite the increase in industrial units, the gross output value in the modern sector declined (by €0.35 billion), continuing the even sharper fall observed between 2009 and 2010, when output value declined by more than €7 billion.

### Manufacturing employment

- In quarter 1 2013, 20,500 persons in the Mid West region were employed in manufacturing
- Over a quarter (28%) were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.); 22% were in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); 24% were in medium-high tech (e.g. chemicals, electrical, transport equipment etc.), while high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for just over a quarter of employment
- A comparatively small share of Mid West manufacturing employment is in the low-tech sector (28%, compared to a national average of 38%); this is the lowest share of low-tech manufacturing employment observed across all regions.

Figure 5.5 Manufacturing employment (Mid West), Q1 2013



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

Figure 5.6 Employment by broad occupation (Mid West), Q1 2013



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

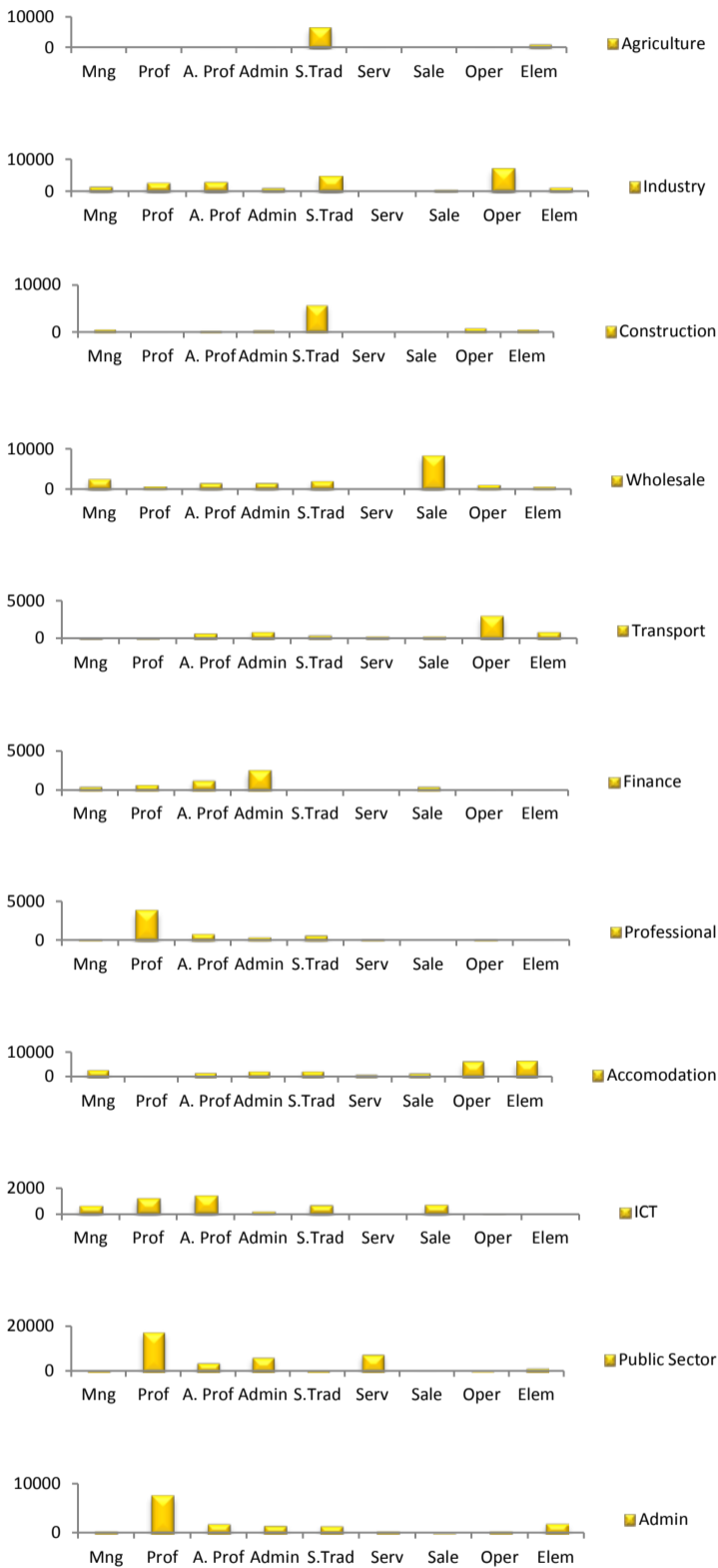
### Employment by occupation

- In quarter 1 2013, 28,000 persons, or 19% of the total workforce in the Mid West region, were employed in professional occupations
- Other white collar workers (managers, associate professionals and admin) accounted for 29% of the Mid West workforce
- Skilled trades occupations employed almost 25,000 persons; of these skilled trades workers, more than a quarter were farmers and 17% worked in construction
- Elementary workers and operatives accounted for 9% of the total employment in the Mid-West region each.



Mid West

Figure 5.7 Employment by broad occupation and sector (Mid West) (000s), Q1 2013



### Employment by occupation and sector

- In quarter 1 2013, approximately one half of employment in wholesale/retail, transport, and accommodation/food services was in low skilled occupations (i.e. sales, operative or elementary roles)
- The majority of those working in the ICT, professional services and public sectors are in high skilled occupations (professionals and associate professionals)
- Wholesale/retail and accommodation/food services employ relatively large numbers (and shares) of managers
- The majority of those working in industry were either in low skilled occupations or in skilled trades occupations; however, white collar occupations (managerial, professional, associate professional, and clerical) accounted for more than a third of total employment
- Within occupational groups, the highest employment was found in the following occupations:
  - **Managers:** functional managers/directors, managers in hospitality/leisure services, managers & proprietors in wholesale/retail
  - **Professionals:** teachers, nurses, accountants
  - **Associate professionals:** business sales executives, gardaí
  - **Secretarial/admin:** personal assistants, Government clerks, and finance admin occupations (e.g. bank clerks, wages clerks)
  - **Skilled trades:** farmers, electricians
  - **Services:** care workers, childminders
  - **Sales:** retail assistants
  - **Operatives:** assemblers, truck & van drivers
  - **Elementary:** Catering staff, cleaners.

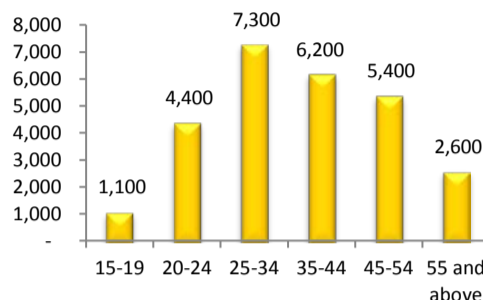
Source: Analysis by FÁS (SLMRU) based on CSO data



### Unemployment

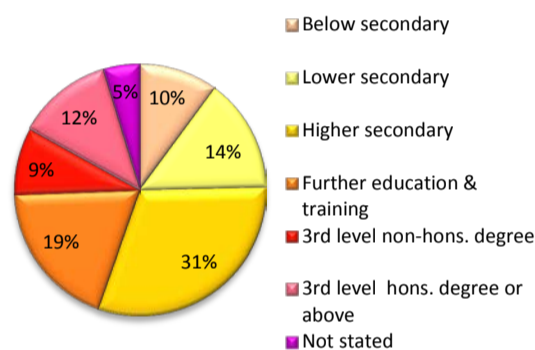
- In August 2013, there were 37,000 persons on the Live Register in the Mid West region (a decline of 6% on August 2012); of these, 17% were under 25 and 61% were male
- In quarter 1 2013, there were 27,000 unemployed persons in the Mid West region in ILO terms (Figure 5.8)
- Age:** at 20%, this region had a higher share of persons under 25 unemployed than the national average of 18%
- Education:** half of unemployed persons in this region had completed either higher secondary education or further education and training
- Sector:** in line with the national average, unemployed persons in the Mid West had previously been employed primarily in industry, construction or wholesale and retail
- Occupation:** those previously employed in skilled trades and elementary occupations accounted for a significant share of unemployed persons in this region.

Figure 5.8 Unemployment by age (Mid West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 5.9 Unemployment by education (Mid West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 5.10a PES job seekers (Mid West), Sept 2013

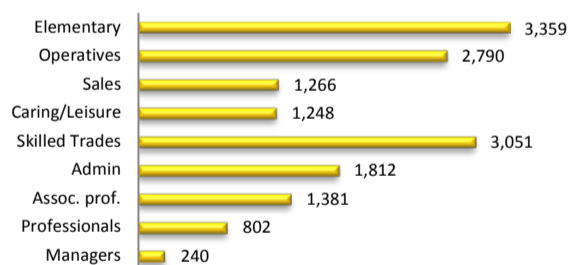
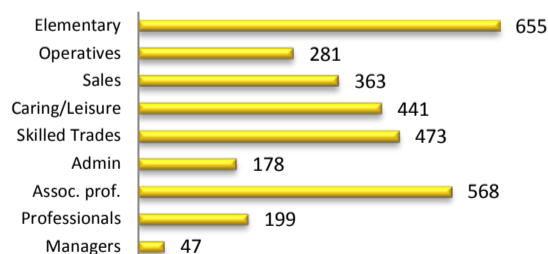


Figure 5.10b PES vacancies (Mid West), Jan-Sept 2013



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

### PES job seekers and vacancies

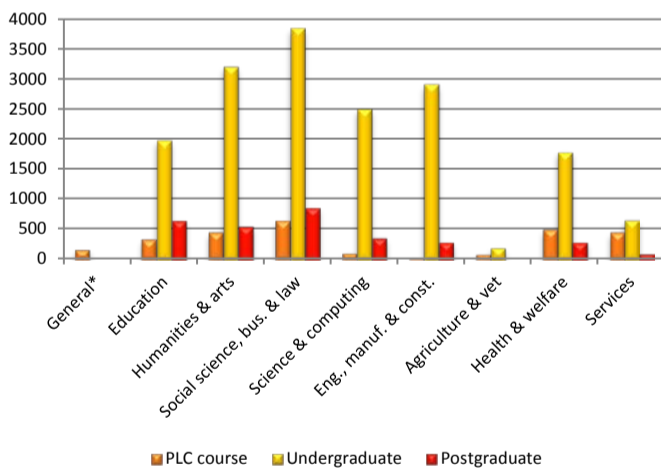
- In September 2013, 16,000 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (construction, process, and catering), skilled trades (carpenters, bricklayers, painters) or operatives (process operatives)
- Between Jan - Sept 2013, over 3,200 vacancies were advertised through DSP Jobs Ireland; the highest number of vacancies was for elementary occupations (security guards), associate professionals (business sales executives), skilled trades (chefs), caring/leisure & personal services (care workers and home carers) and sales staff (credit collectors, sales assistants).



### Employment growth and job creation

- Over the period quarter 1 2012 to quarter 1 2013, employment decreased by 3%; only one other region (the Mid East) experienced a decline in employment in this period; however, employment levels varied by sector:
  - Wholesale/retail employment fell by 10%, the largest decline for this sector across all regions; declines also occurred in construction, transport and PAD although the numbers involved are small
  - employment levels increased for education (+28%), health (+10%), accommodation/food services (+3%), and professional and administrative activities (both increasing by 2%)
- Recent job announcements suggest that over the short to medium term job opportunities will arise in industry (high tech manufacturing and energy areas), technology and food/retail outlets.

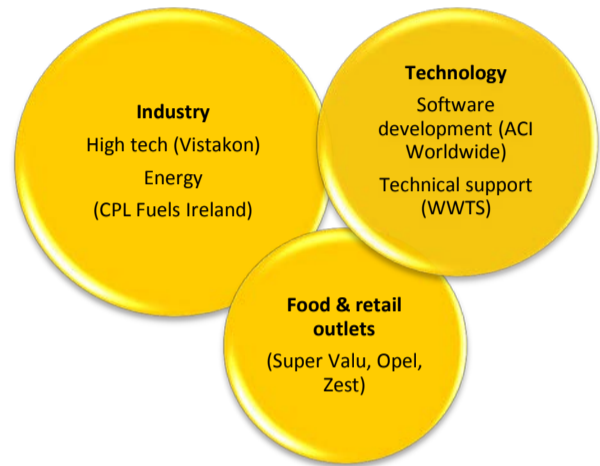
Figure 5.12 PLC course & higher education enrolments (Mid West), 2012



Source: DES, HEA

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

Figure 5.11 Job creation announcements (Mid West), 2013



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

### Education and training enrolments

- In 2012, there were approximately 23,000 enrolments in selected further/higher education and training in the Mid West:
  - approximately 2,700 PLC students
  - more than 17,100 undergraduates
  - almost 3,100 at postgraduate level
- Almost a quarter of all PLC enrolments were in social science, business and law (e.g. business studies), this was followed by health and welfare, which accounted for almost a fifth
- At undergraduate level, almost a quarter of enrolments were in social science, business and law; humanities and arts accounted for a further fifth; the combined enrolments for technology related subjects (i.e. science/computing and engineering etc.) made up more than 32% of the total at this level (5,400 students)
- The highest number of enrolments at postgraduate level was in social science, business and law (almost 900 learners, or 28%), followed by education (more than 600, or 21%).

## Census (2011) data by county

Table 5.1. Persons at work and unemployed in Mid West region by county, Census 2011

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

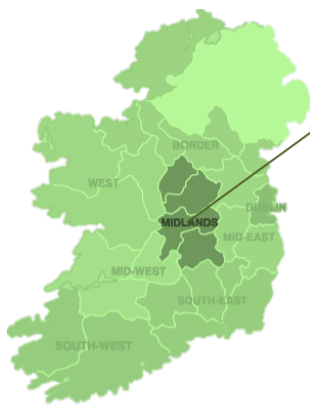
Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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

## 6. Midland



Population	288,927
Working age (15-64)	186,500
Labour force	128,900
Employment	106,900
Unemployment	22,000
Unemployment rate	17.1%
Participation rate	58.6%

### Employment by sector

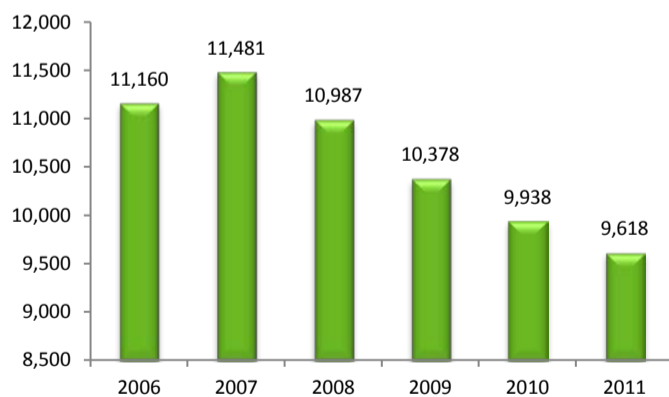
- In quarter 1 2013, wholesale/retail was the largest employer in the Midland region with 17% of the workforce; a further 14% were employed in industry
- The public sector (PAD, health and education combined) employed 30% of the workforce
- High value added sectors (professional, financial and IT activities) each accounted for an average of almost 3% of the region's employment.

Figure 6.1 Employment by broad economic sector (Midland), Q1 2013



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

Figure 6.2 Active enterprises (Midland)



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

\*Excludes public sector & agriculture

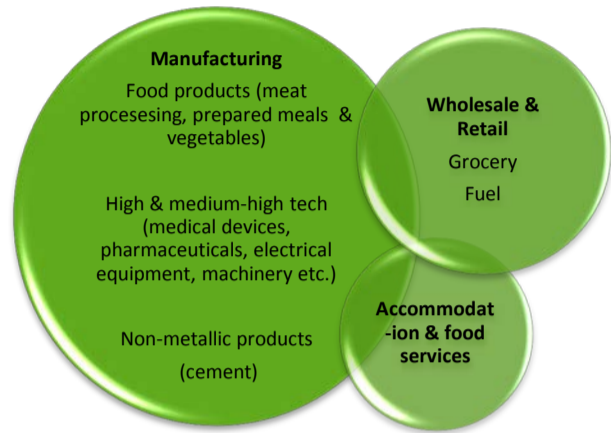
### Active enterprises

- In 2011, there were almost 10,000 active enterprises outside agriculture and public sector in the Midland region
- The number of active enterprises declined by 1,800 between 2007 and 2011
- The majority (92%) of active enterprises employed fewer than 10 people; less than 1% employed more than 250 persons
- Wholesale/retail and construction had the largest numbers of active enterprises with approximately 2,500 each
- Between 2010 and 2011, the number of active enterprises in construction alone declined by 200, adding to the decline of 300 already recorded between 2009 and 2010.

Figure 6.3 Sectors with largest enterprises (Midland), 2012

**Medium to large enterprises by sector**

- In the Midland region, manufacturing accounted for the largest number of medium to large enterprises (employing at least 50 persons), mostly in the areas of food processing, high tech and medium-high tech manufacturing (e.g. medical devices, pharmaceuticals, electrical equipment), and non-metallic products
- There are also some medium to large enterprises in wholesale/retail and in accommodation and food services.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 6.4a Industrial units (Midland)

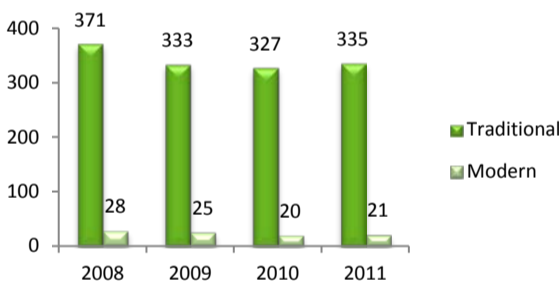
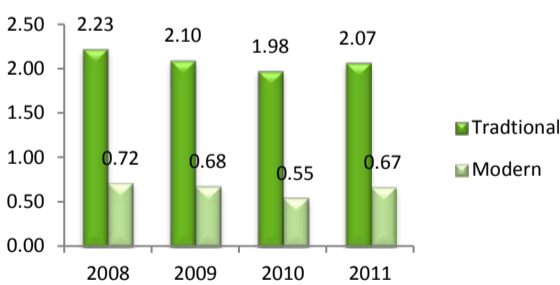


Figure 6.4b Gross output in industrial units (Midland), € billion



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

**Industrial activity**

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

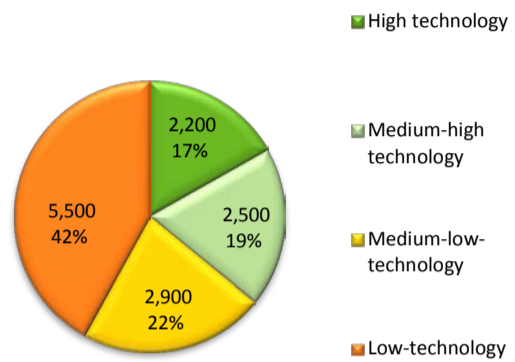


## Midland

### Manufacturing employment

- In quarter 1 2013, over 13,000 persons in the Midland region were employed in manufacturing
- Low-tech manufacturing (e.g. food processing, wood, printing etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) combined accounted for 64% of total manufacturing employment; a further 19% were in medium-high tech (e.g. chemicals, electrical, transport equipment etc.); high-tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.) accounted for 17% of employment
- At 17%, compared to a national average of 27%, the Midland region had a lower than average share of its manufacturing employment in the high-tech sector.

Figure 6.5 Manufacturing employment (Midland), Q1 2013



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

Figure 6.6 Employment by broad occupation (Midland), Q1 2013



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

### Employment by occupation

- In quarter 1 2013, professional occupations accounted for 18% of all those employed in the Midland region; other white collar workers (associate professionals, managers and admin) accounted for just over one quarter of all persons employed in the region
- Skilled trades accounted for 14% of employment in the region or 15,200 persons; of these 30% were farmers
- Elementary workers and operatives each accounted for 11% of the total employment.

Figure 6.7 Employment by broad occupation and sector (Midland) (000s), Q1 2013



#### Employment by occupation and sector

- In quarter 1 2013, approximately two thirds of those employed in industry were working in operative, elementary, or skilled trade occupations
- The greater share of those working in the public sector (PAD, education & health), ICT, finance, and professional services were white collar workers (i.e. managers, professionals, associate professionals or secretarial/admin occupations)
- In wholesale/retail, transport and accommodation/food services, the larger share of workers were in low skilled occupations (sales, operative or elementary occupations)
- Within occupational groups, the highest employment was in the following occupations:
  - **Managers:** functional managers, shopkeepers/proprietors
  - **Professionals:** teachers, nurses, IT professionals
  - **Associate professionals:** business sales executives
  - **Secretarial/admin:** Government clerks, personal assistants
  - **Skilled trades:** farmers, metal working production/maintenance fitters
  - **Services:** care workers, childminders
  - **Sales:** sales and retail assistants
  - **Operatives:** truck and van drivers, food process operatives
  - **Elementary:** construction workers.

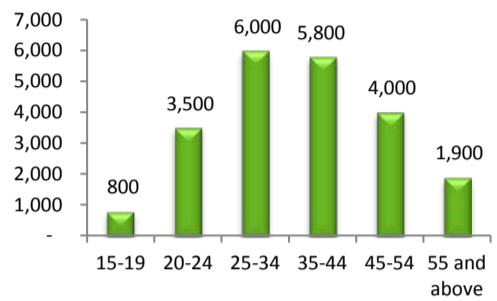
Source: Analysis by SOLAS (SLMRU) based on CSO data



### Unemployment

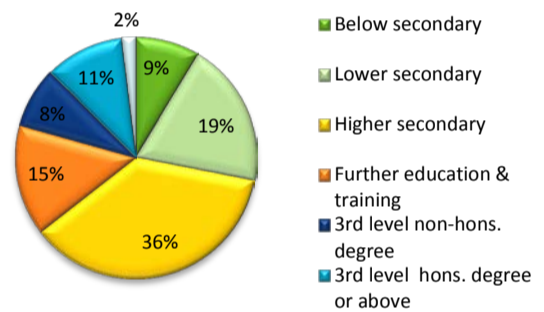
- In August 2013, there were 34,600 persons on the Live Register in the Midland region (a 2% decline on August 2012); of these, 18% were under 25 and 60% were male
- In quarter 1 2013, there were almost 22,000 unemployed persons in the Midland region in ILO terms (Figure 6.8)
- **Age:** at 20%, this region had a higher share of persons under 25 unemployed than the national average (18%)
- **Education:** over a third of all unemployed persons in this region had a higher secondary education attainment, above the national average; this region had one of the lowest shares of unemployed persons with third level qualifications
- **Sector:** unemployed persons from this region had primarily been employed in the construction and wholesale/retail sectors
- **Occupation:** those previously employed in skilled trades, elementary occupations and as operatives accounted for a significant share of unemployed persons in this region.

Figure 6.8 Unemployment by age (Midland), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 6.9 Unemployment by education (Midland), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 6.10a PES job seekers (Midland), Sept 2013

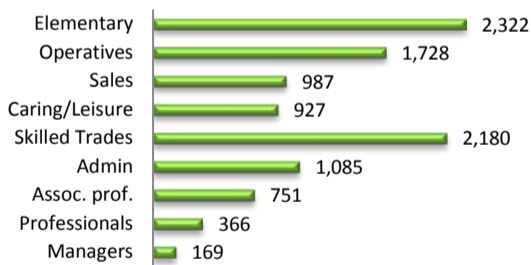
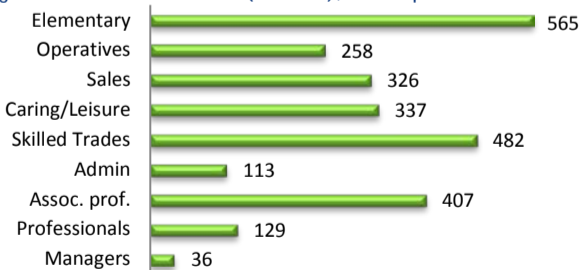


Figure 6.10b PES vacancies (Midland), Jan-Sept 2013



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

### PES job seekers and vacancies

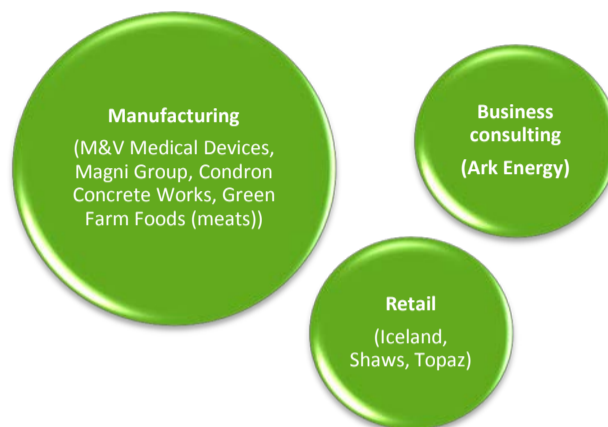
- In September 2013, approximately 10,500 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (construction, process plant), skilled trades (carpenters, painters, bricklayers) or as operatives (HGV/van drivers, process operatives)
- Between Jan - Sept 2013, 2,700 vacancies were advertised through DSP Jobs Ireland, accounting for 5% of all notified vacancies; the highest number of vacancies was for elementary occupations (security guards), skilled trades (chefs), associate professionals (business sales executives), caring/leisure & personal services (care workers and home carers) and sales (sales and retail assistants).



### Employment growth and job creation

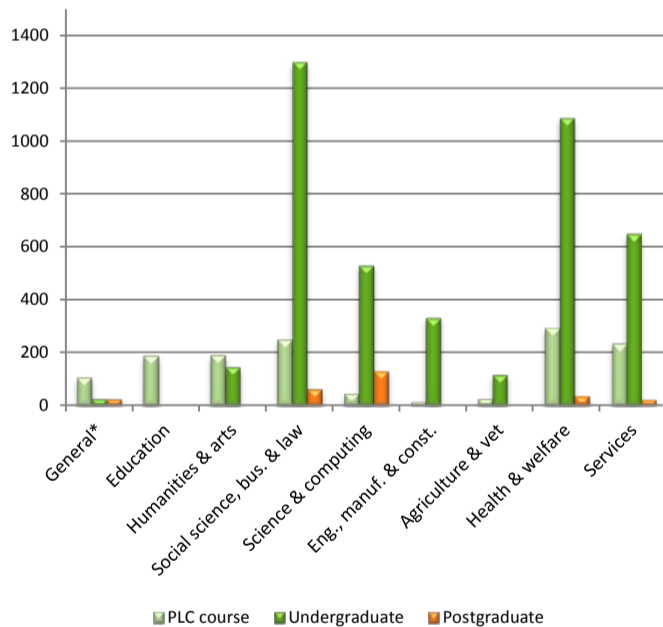
- Over the period quarter 1 2012 to quarter 1 2013, employment levels in the Midland region increased by 2%; this varied across sectors:
  - the health and social work sector saw employment grow by 26% (the highest percentage growth for this sector across all regions); growth in employment also occurred for wholesale/retail, ICT and education
  - all other sectors experienced a decline, particularly the construction sector which declined by 28% (the largest percentage decline in employment levels for this sector across all regions).
- Recent job announcements suggest that job opportunities, in the short to medium term, will arise primarily in the manufacturing, business consulting and retail sectors.

Figure 6.11 Job creation announcements (Midland), 2013



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

Figure 6.12 PLC course & higher education enrolments (Midland), 2012



Source: DES, HEA

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

### Education and training enrolments

- In 2012, there were over 5,800 enrolments in selected further and higher education and training in the Midland region:
  - almost 1,400 PLC students
  - over 4,200 undergraduates
  - almost 300 at postgraduate level
- In the PLC sector, the highest number of enrolments was in health and welfare (almost 300 learners); this was followed by social science, business and law (250 learners) and services (over 200 learners, typically for courses such as sport/recreation or travel and tourism)
- Almost a third of all undergraduates (1,300) were studying social science, business and law; a further quarter (1,100) were in health and welfare; with approximately 650 learners, the services field (e.g. hospitality, hotel management etc.) accounted for a further 15%
- At postgraduate level, almost one half of all enrolments were in science and computing (almost 150 learners).





Midland

## Census (2011) data by county

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

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

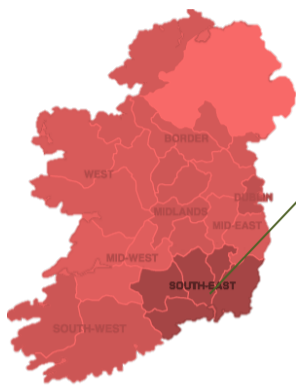
Source: CSO Census 2011

Table 6.1 shows employment in the Midland region by county in 2011. Westmeath accounted for the largest share of employment in the Midland region at 31%, followed by Laois at 29%; Offaly accounted for 26% of Midland employment with Longford accounting for almost half that at 13%.

Key points from the Census 2011 data include:

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

## 7. South East



Population	503,200
Working age (15-64)	326,200
Labour force	228,600
Employment	186,500
Unemployment	42,000
Unemployment rate	18.4%
Participation rate	58.3%

### Employment by sector

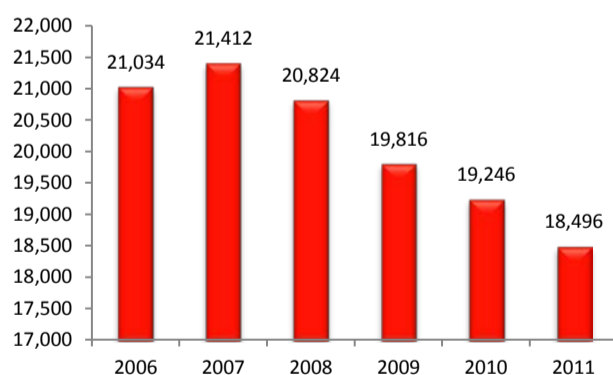
- In quarter 1 2013, industry and wholesale/retail employed almost one third of all those employed in the South East region, with almost 60,000 persons
- The public sector (PAD, health and education combined) employed one quarter of the workforce
- High value added sectors accounted for a total of 10% of the region's employment, with professional activities at 5%, finance at 3% and IT at 2%.

Figure 7.1 Employment by broad economic sector (South East), Q1 2013



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

Figure 7.2 Active enterprises (South East)



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

\*Excludes public sector & agriculture

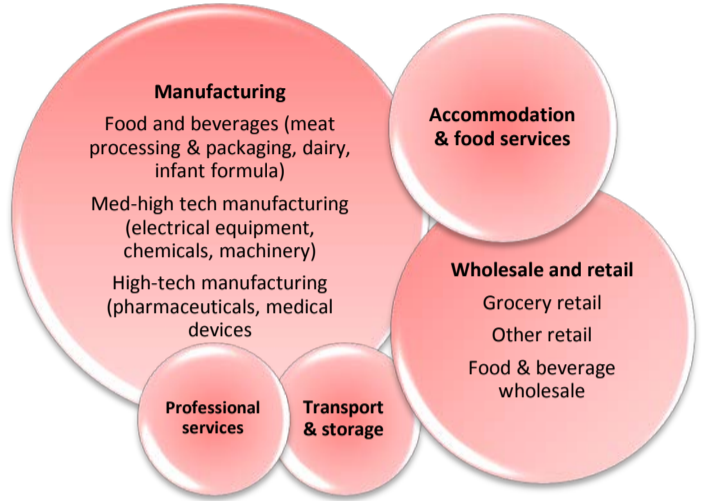
### Active enterprises

- In 2011, there were almost 18,500 active enterprises outside agriculture and the public sector in the South East
- The number of active enterprises has continued to decline from its peak of 21,412 in 2007
- Just over 91% of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Wholesale/retail and construction had the most enterprises with approximately 4,700 and 4,100 respectively, followed by professional activities (2,100)
- Following a fall of 600 between 2009 and 2010, the number of enterprises in construction continued to decline in 2011 (by a further 450).

Figure 7.3 Sectors with largest enterprises (South East), 2012

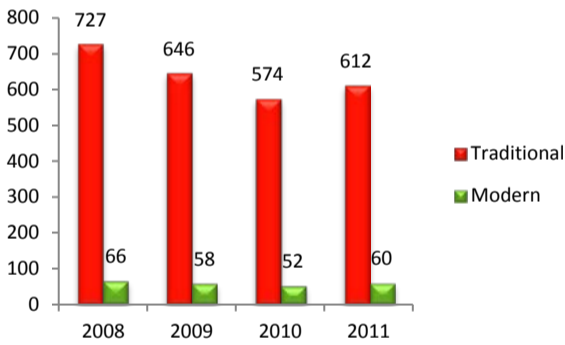
Medium to large enterprises by sector

- In the South East region, the highest number of medium to large enterprises (employing 50 persons or more) was found in manufacturing and wholesale/retail
- There are also some medium to large enterprises in accommodation/food services and, to a lesser extent, in transport and storage and professional services.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

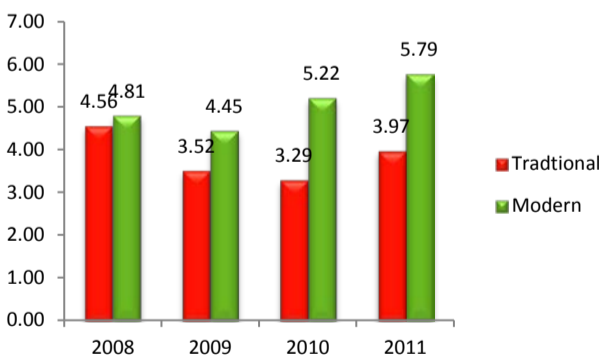
Figure 7.4a Industrial units (South East)



Industrial activity

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

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

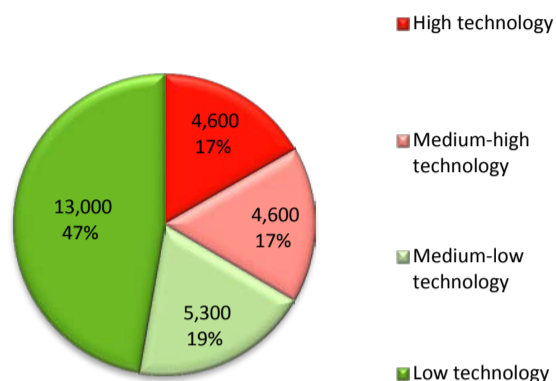


Source: Analysis by SOLAS (SLMRU) based on CSO data

### Manufacturing employment

- In quarter 1 2013, almost 27,500 persons in the South East region were employed in manufacturing
- Employment was greatest in low tech manufacturing at 47% (e.g. food processing, wood, printing etc.); 19% were employed in medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); just under 17% each were in medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and high tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.)
- The South East’s share of employment in low tech manufacturing was well above the national average (38%), while its share in high tech was considerably below the national average (27%).

Figure 7.5 Manufacturing employment (South East), Q1 2013



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

Figure 7.6 Employment by broad occupation (South East), Q1 2013



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

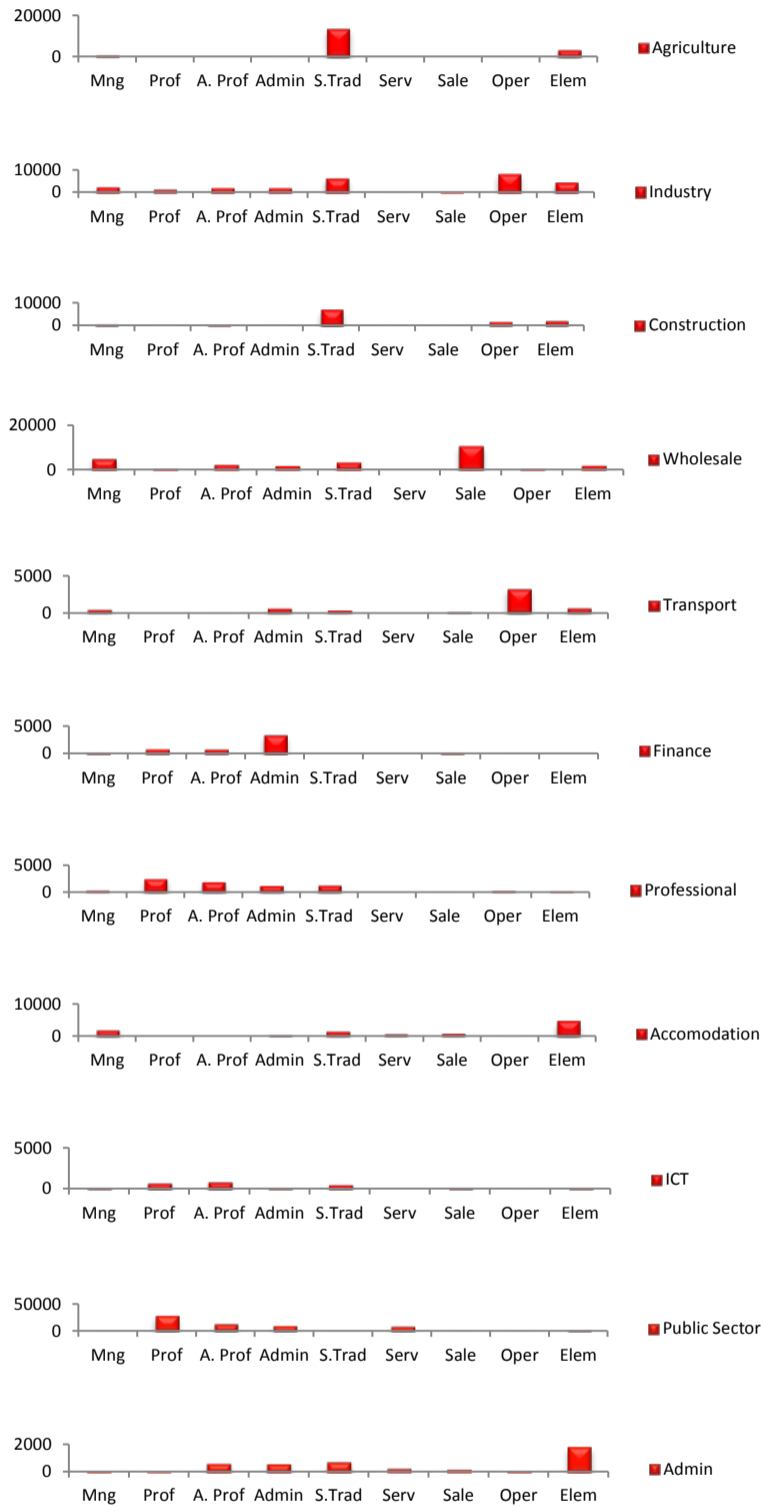
### Employment by occupation

- In quarter 1 2013, skilled trades employed 20% of the total workforce in the South-East region; of these, farmers accounted for just over one third
- White collar workers (managers, professionals, associate professionals and admin combined) accounted for 41% of all persons employed in the South East; after the Border region (40%), this was the lowest share of white collar employment across all regions
- Caring, leisure and other services employed 18,000 persons or 10% of the total workforce in the South East; elementary workers and operatives combined accounted for 22% of the total workforce in the region.



South East

Figure 7.7 Employment by broad occupation and sector (South East) (000s), Q1 2013



Employment by occupation and sector

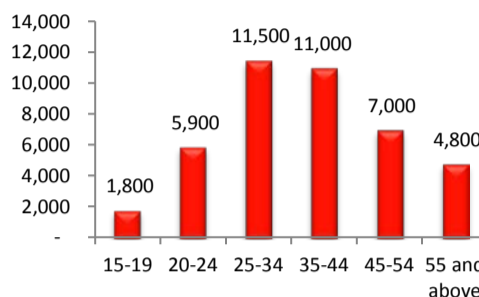
- In quarter 1 2013, low skilled occupations (sales, operative and elementary roles) made up the greater share of employment in transport and accommodation/food services; they also accounted for almost a half of employment in the wholesale/retail sector
- White collar occupations (managers, professionals, associate professionals and admin combined) accounted for at least three quarters of employment in finance, professional activities and the public sector (PAD, education and health)
- Within occupational groups, the highest employment was in the following occupations:
  - Managers: functional managers, managers/proprietors in retail/wholesale
  - Professionals: teachers, nurses
  - Associate professionals: business sales executives, sales accounts managers
  - Secretarial/admin: Government clerks and finance admin occupations (e.g. bank clerks, wages clerks)
  - Skilled trades: farmers
  - Services: childminders, carers, hairdressers
  - Sales: retail sales assistants
  - Operatives: food process operatives, truck drivers
  - Elementary: construction workers, cleaners, catering staff, farm workers.

Source: Analysis by SOLAS (SLMRU) based on CSO

### Unemployment

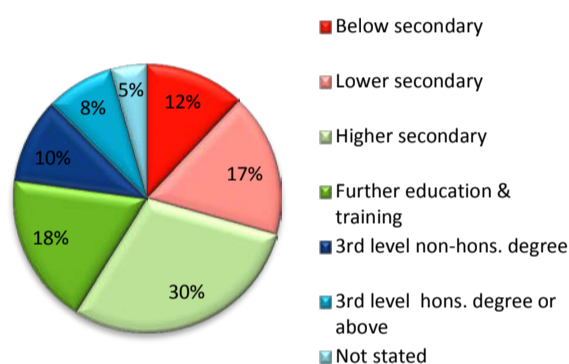
- In August 2013, there were 57,000 persons on the Live Register in the South East region (a 4% decline on August 2012); of these, 17% were under 25 and 61% were male
- In quarter 1 2013, there were 42,000 unemployed persons in the South East in ILO terms (Figure 7.8)
- **Age:** 18% of those unemployed were aged under 25 in this region, in line with the national average
- **Education:** at 12%, this region had the highest share, along with the West region, of unemployed persons with below secondary education
- **Sector:** the South East region had the highest share of unemployed persons previously employed in the construction sector, at 24%
- **Occupation:** almost a half of those unemployed in this region had previously been employed as operatives, skilled tradespersons or in elementary occupations.

Figure 7.8 Unemployment by age (South East), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 7.9 Unemployment by education (South East), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 7.10a PES job seekers (South East), Sept 2013

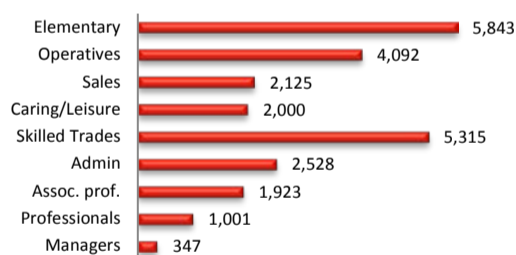
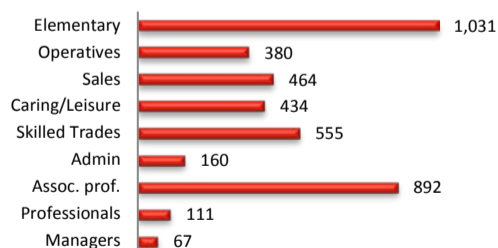


Figure 7.10b PES vacancies (South East), Jan-Sept 2013



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

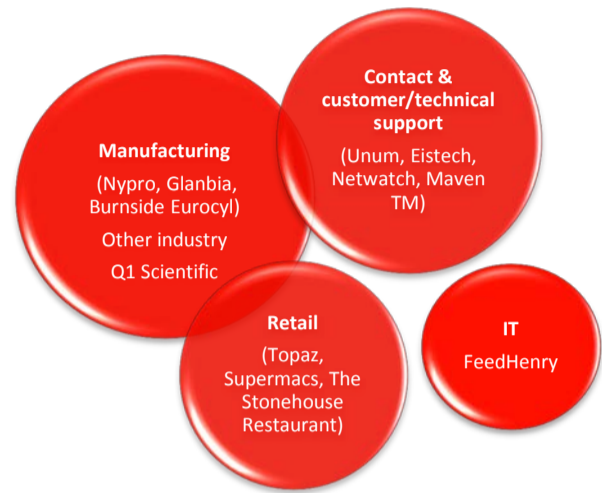
### PES job seekers and vacancies

- In September 2013, over 25,000 job seekers were registered with the PES; the highest number of job seekers had previously worked as elementary workers (process plant, construction), skilled trades persons (carpenters, bricklayers, plasterers) or operatives (process operatives)
- Between Jan - Sept 2013, 4,100 vacancies were advertised through DSP Jobs Ireland; the highest number of vacancies was for elementary occupations (security guards, kitchen & catering assistants and cleaners), associate professionals (business sales executives, IT user support technicians, marketing associate professionals) and skilled trades (chefs).

### Employment growth and job creation

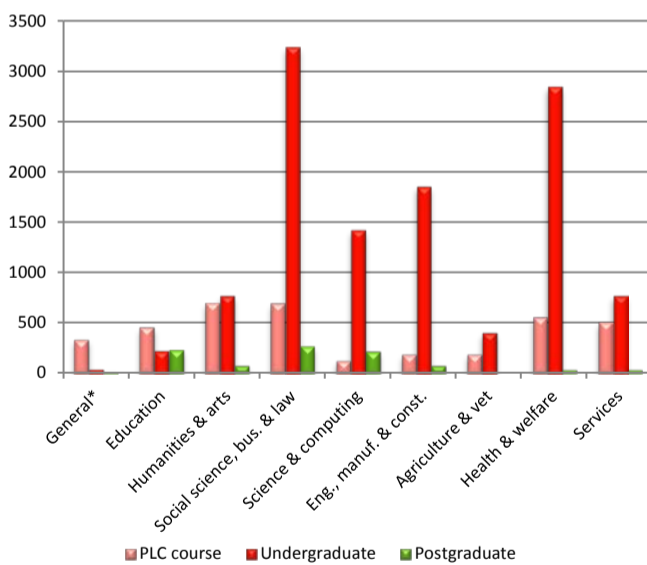
- Over the period quarter 1 2012 to quarter 1 2013, employment increased by 3%; employment growth varied by sector:
  - this region saw the largest percentage decline in both transport and ICT across all regions (by 28% and 15% respectively)
  - the agriculture sector in this region accounted for the largest share of employment in at over one fifth and experienced an increase of 23% over the period; construction employment also increased, by 21%
- Recent job announcements suggest that over the short to medium term job opportunities will arise for customer/technical support roles in contact centres as well as in industry and retail/food outlets; there will also be some job creation in the IT (mobile app) sector.

Figure 7.11 Job creation announcements (South East), 2013



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

Figure 7.12 PLC course & higher education enrolments (South East), 2012



Source: DES, HEA

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

### Education and training enrolments

- In 2012, there were over 16,000 students enrolled in selected further/higher education and training in the South East:
  - almost 4,000 PLC enrolments
  - almost 12,000 undergraduates
  - almost 1,000 at postgraduate level
- In the PLC sector, with approximately 700 learners each, humanities/arts field and social science, business and law made up almost a fifth of the total at this level each
- Over a quarter of all undergraduates were in the social science, business and law field, followed by health and welfare
- At postgraduate level, the highest number of enrolments was for social science, business and law (28%), followed by education (almost a quarter).

## Census (2011) data by county

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

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

Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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



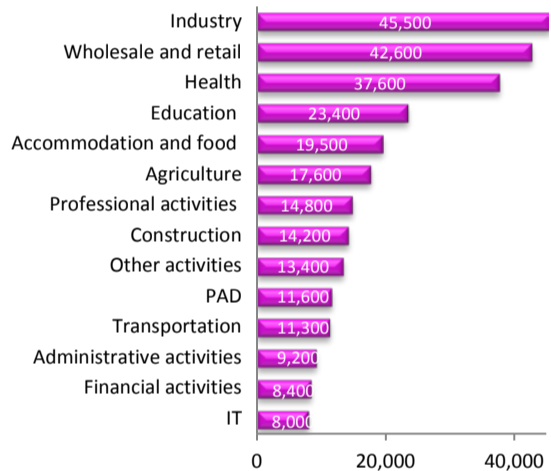
## 8. South West



### Employment by sector

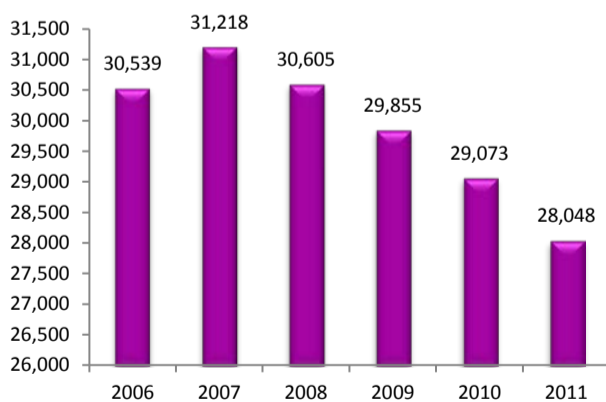
- In quarter 1 2013, the industry and wholesale/retail sectors employed almost 90,000 persons in the South West region, accounting for one third of the total workforce in the South West
- Public sector employment (health, PAD and education combined) accounted for just over one quarter of all persons employed in the region; after Dublin, the South West had the highest numbers employed in the public sector nationally
- High value added sectors accounted for 11% of the region's employment, with finance at 3%, IT at 3% and professional activities at 5%.

Figure 8.1 Employment by broad economic sector (South West), Q1 2013



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

Figure 8.2 Active enterprises (South West)



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

\*Excludes public sector & agriculture

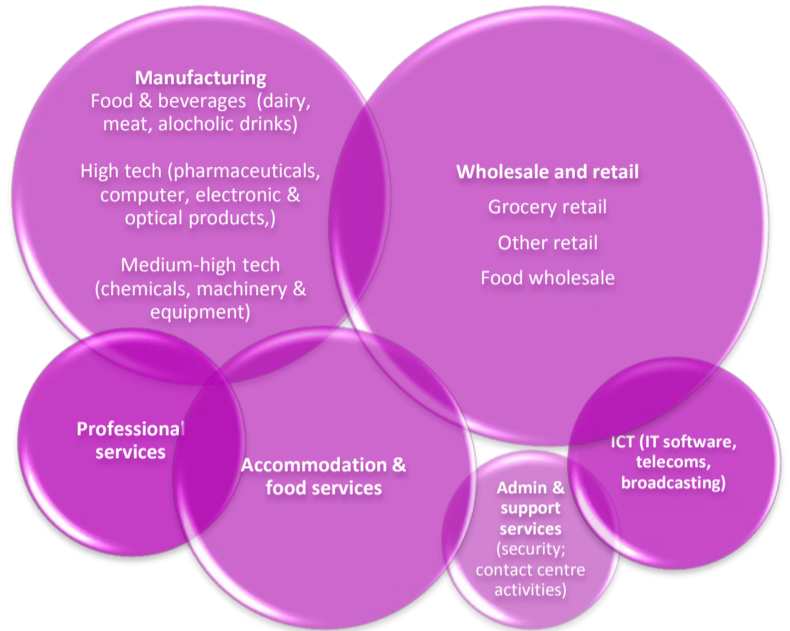
### Active enterprises

- In 2011, there were just over 28,000 active enterprises outside agriculture and the public sector in the South West region
- The number of active enterprises decreased from its peak of 31,218 in 2007
- The majority (91%) of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Wholesale/retail and construction had the largest number of active enterprises, with approximately 6,000 and 6,500 respectively, followed by professional activities (4,600)
- Between 2010 and 2011, the number of active enterprises in construction alone declined by approximately 600, continuing the fall observed between 2009 and 2010 when the number of construction enterprises fell by 700.

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

**Medium to large enterprises by sector**

- The highest number of medium to large enterprises (employing at least 50 persons) in the South West region was in manufacturing and accommodation/food services.
- There are also some medium to large enterprises in professional services, ICT, and administrative & support services.



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 8.4a Industrial units (South West)

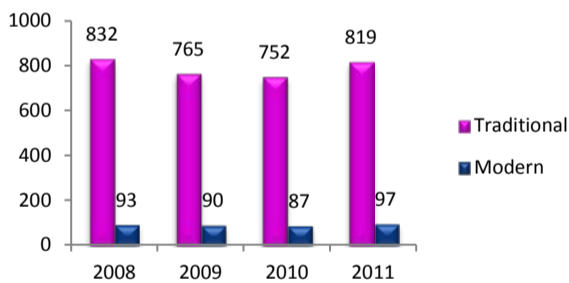
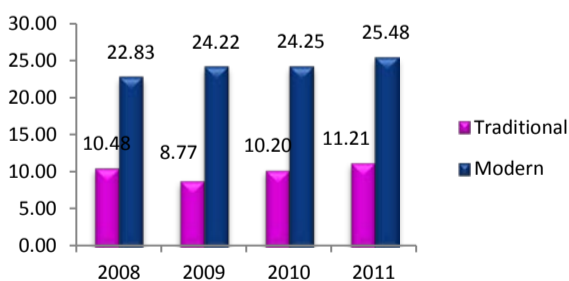


Figure 8.4b Gross output in industrial units (South West), € billion



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

**Industrial activity**

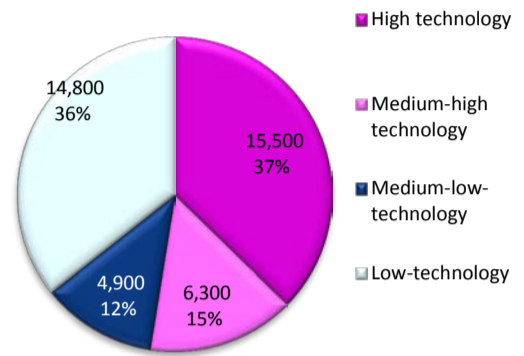
- In 2011, 90% of all industrial units (manufacturing, energy and utilities) in the South West region were in the traditional sector
- The number of industrial units increased between 2010 and 2011 for both sectors (modern and traditional)
- While 10% of industrial units were in the modern industry sector, they produced almost 70% of the regional gross industrial output value in 2011
- The value of gross output in the modern sector increased from €24.2 billion in 2010 to €25.4 billion in 2011; the value of gross output in the traditional sector increased from €10.2 billion to €11.2 billion.



**Manufacturing employment**

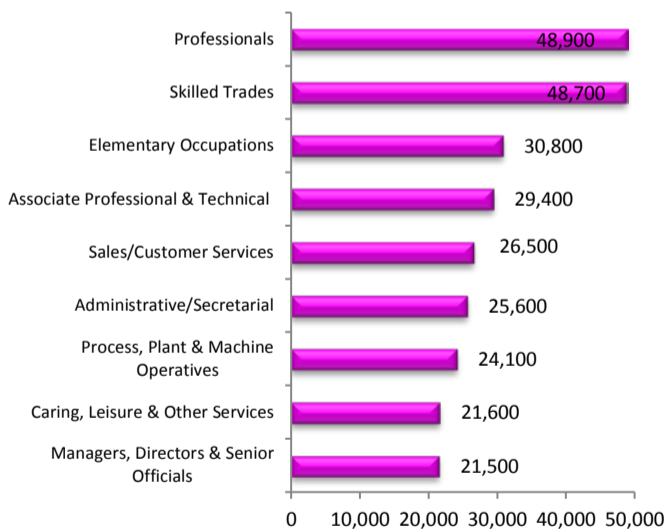
- In quarter 1 2013, 41,500 persons in the South West region were employed in manufacturing
- 37% were employed in high tech manufacturing (e.g. pharmaceuticals, electronics, optical products etc.); combined, 27% were employed in medium-high tech (e.g. chemicals, electrical, transport equipment etc.) and medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.); 36% were employed in low-tech manufacturing (e.g. food processing, wood, printing etc.)
- At 36%, the share of the South West’s employment in high tech manufacturing was above the national average (27%); this was amongst the highest shares for high tech employment across all regions, second only to Dublin.

Figure 8.5 Manufacturing employment (South West), Q1 2013



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

Figure 8.6 Employment by broad occupation (South West), Q1 2013

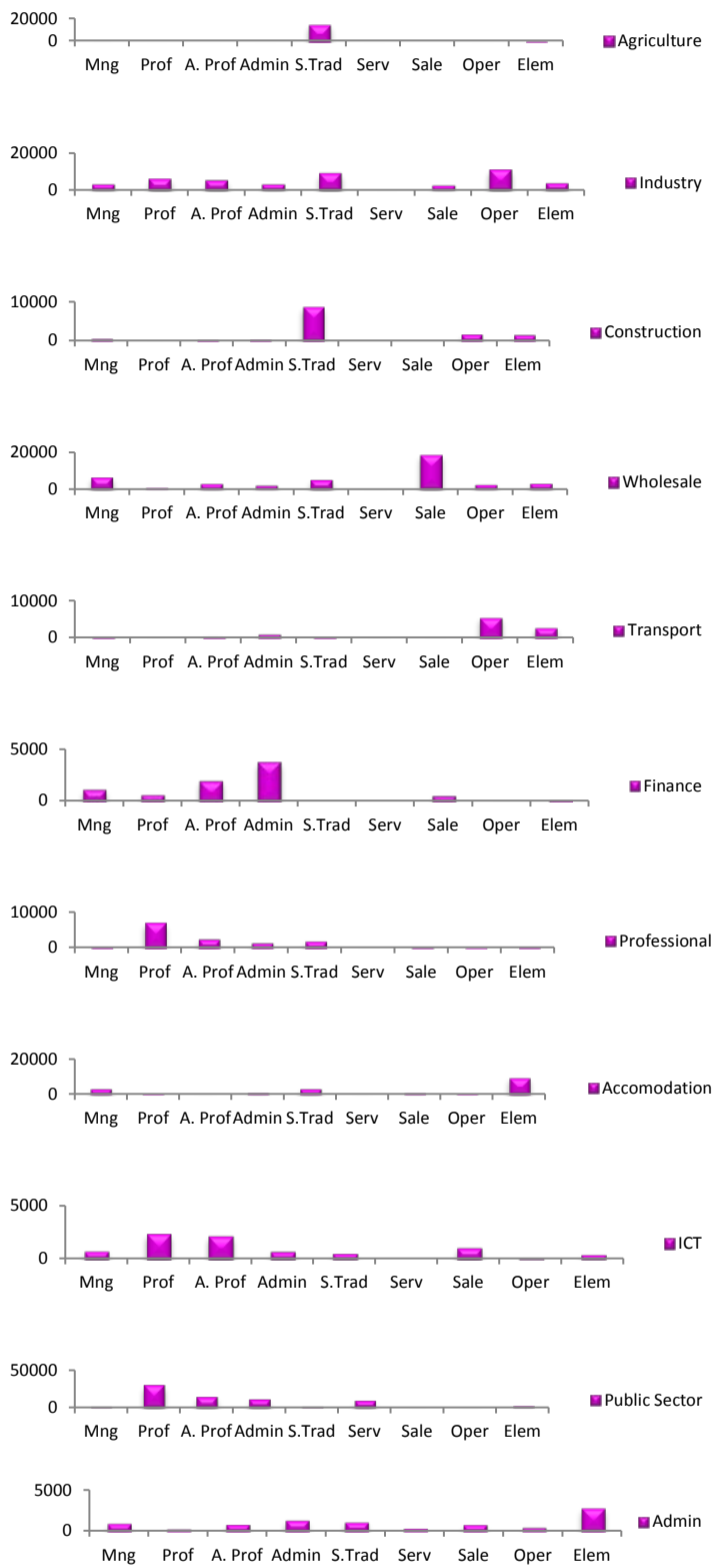


Source: Analysis by SOLAS (SLMRU) based on CSO data

**Employment by occupation**

- In quarter 1 2013, professional and skilled trades occupations each employed 18% of the total workforce in the South West; almost 30% of those employed in skilled trades occupations were farmers
- Total white collar occupations (i.e. managers, professionals, associate professionals and admin combined) accounted for 45% of the South West workforce
- Elementary workers and operatives combined totalled almost 55,000 persons, amounting to 20% of total employment.

Figure 8.7 Employment by broad occupation and sector (South West) (000s), Q1 2013



### Employment by occupation and sector

- In quarter 1 2013, at least one half of total employment in the wholesale/retail, transport, and accommodation/food services sectors was in low skilled occupations (i.e. sales, operative, elementary roles)
- White collar occupations (managerial, professional, associate professional and admin) accounted for the largest share of employment in four sectors: ICT, finance, professional services and the public sector
- Within occupational groups, the highest employment was in the following occupations:
  - Managers: functional managers/directors, managers/proprietors in wholesale/retail
  - Professionals: teachers, nurses, accountants
  - Associate professionals: business sales executives, gardaí
  - Secretarial/admin: Government clerks, personal assistants, and finance admin occupations (e.g. bank clerks, wages clerks)
  - Skilled trades: farmers, metal working production and maintenance fitters, chefs
  - Services: carers, childminders, hairdressers
  - Sales: retail sales assistants
  - Operatives: taxi drivers, truck/van drivers
  - Elementary: construction workers, cleaners, catering staff.

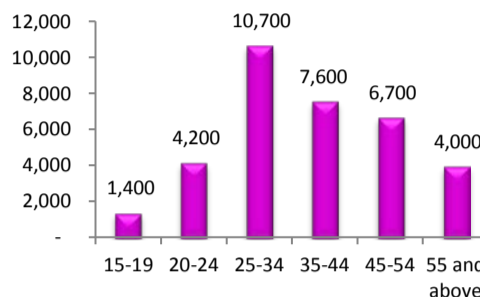
Source: Analysis by SOLAS (SLMRU) based on CSO data



### Unemployment

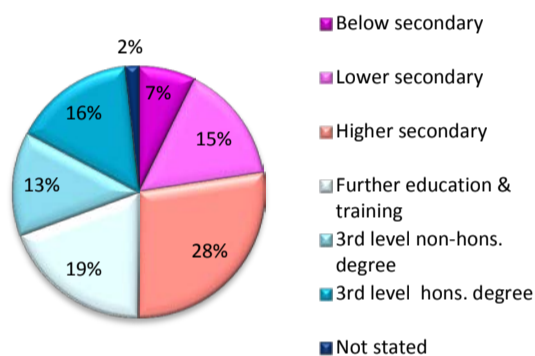
- In August 2013, there were 56,500 persons on the Live Register in the South West region (a 7% decline on August 2012); of these, 15% were under 25 and 61% were male
- In quarter 1 2013, there were almost 35,000 unemployed persons in the South West in ILO terms (Figure 8.8)
- **Age:** at 16%, this region had a lower than average share of unemployed persons aged under 25
- **Education:** 29% of unemployed persons in this region had a third level qualification, the highest share for all regions; conversely, this region had a lower than average share of person with lower secondary education or less
- **Sector:** most unemployed persons in this region had previously been employed in industry, construction and wholesale/retail
- **Occupation:** this region had a higher than average share of persons previously employed in skilled trades and elementary occupations.

Figure 8.8 Unemployment by age (South West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 8.9 Unemployment by education (South West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 8.10a PES job seekers (South West), Sept 2013

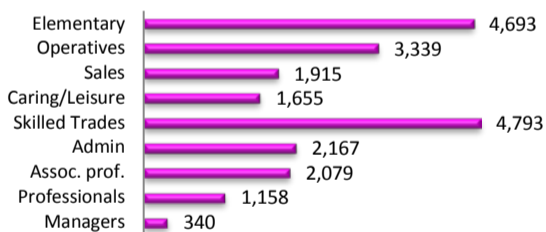
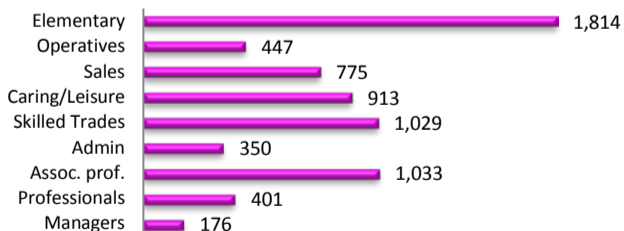


Figure 8.10b PES vacancies (South West), Jan-Sept 2013



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

### PES job seekers and vacancies

- In September 2013, more than 22,000 job seekers were registered with the PES; the highest number of job seekers had previously worked in skilled trades (carpenters, bricklayers, painters), elementary occupations (construction, process plant, catering/hospitality occupations) or as operatives (process operatives)
- Between Jan - Sept 2013, 6,900 vacancies were advertised through DSP Jobs Ireland; the highest number of vacancies was for labourers (security guards, kitchen & catering assistants, waiters and cleaners), associate professionals (business sales executives, IT support technicians), skilled trades (chefs), personal services (care workers & home carers) and sales (sales and retail assistants).

### Employment growth and job creation

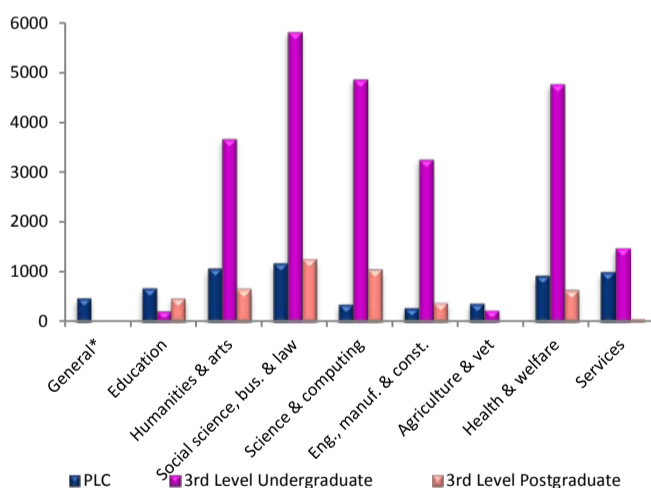
- Over the period quarter 1 2012 to quarter 1 2013, employment increased by 4%; however, employment growth varied by sector:
  - employment in agriculture grew by 45% although the CSO state that estimates of employment from this sector are to be treated with caution
  - an additional 11,000 persons were employed across industry (+9%, which was the largest percentage increase across the regions), professional activities, education and health, combined
  - declines occurred in construction, accommodation and, to a lesser extent, PAD
- Recent job announcements suggest that over the short to medium term ICT will continue to perform well, leading to opportunities in different types of software development roles and customer care/technical support positions; job announcements in industry, particularly in life sciences and testing, and in professionals services are also likely to arise.

Figure 8.11 Job creation announcements (South West) , 2013



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

Figure 8.12 PLC course & higher education enrolments (South West), 2012



Source: DES, HEA

\*Includes broad and combined fields of learning

### Education and training enrolments

- In 2012, there were almost 35,000 enrolments in selected further/higher education and training in the South West
  - almost 6,300 PLC students
  - over 24,000 undergraduates
  - over 4,500 at postgraduate level
- In the PLC sector, enrolments were concentrated in services, social science, business and law, humanities/arts, and health/welfare; each of these fields had in excess of 900 enrolments
- At undergraduate level, social science, business & law had the highest number of enrolments (almost a quarter, or 5,800), followed by science (almost 4,900) and health & welfare (almost 4,800)
- At postgraduate level, social science, business and law (at almost 1,300) accounted for more than one quarter; over a fifth were in science.



## Census (2011) data by county

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

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

Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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



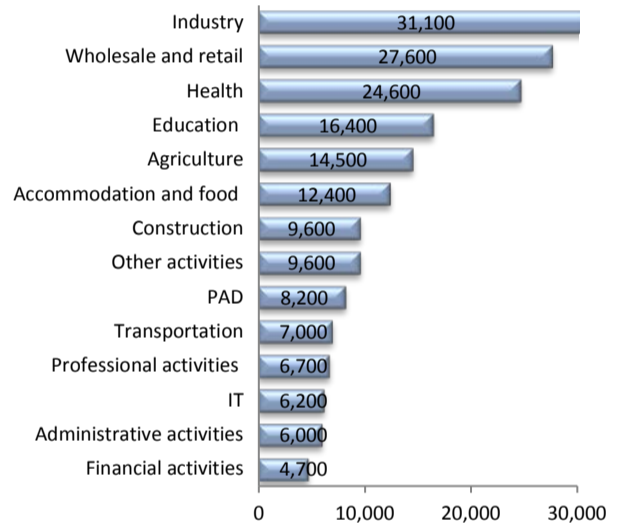
## 9. West



### Employment by sector

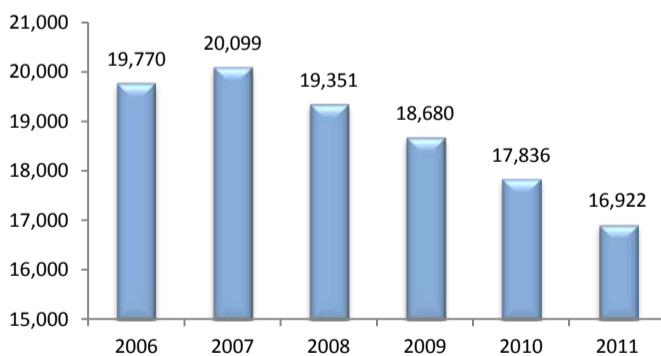
- In quarter 1 2013, industry and wholesale/retail accounted for almost one third of employment in the West
- Public sector employment (comprising health, education and PAD) totalled 49,000 persons, accounting for just over one quarter of the West's workforce
- Agriculture accounted for almost 11% of employment in the region
- High value added sectors (professional, financial and IT activities combined) accounted for 9% of employment in the West.

Figure 9.1 Employment by broad economic sector (West), Q1 2013



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

Figure 9.2 Active enterprises\* (West)



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

\* Excludes public sector and agriculture

### Active Enterprises

- In 2011, there were almost 17,000 active enterprises outside agriculture and the public sector in the West region
- The number of active enterprises continued to decline from its peak of 20,099 in 2007
- Almost 92% of active enterprises employed fewer than 10 persons; less than 1% employed 250 persons or more
- Construction and wholesale/retail had the largest number of enterprises (approx. 4,000 each)
- Between 2010 and 2011, the number of active enterprises in construction declined by almost 500, continuing the decline of 700 observed the preceding year (2009-2010).

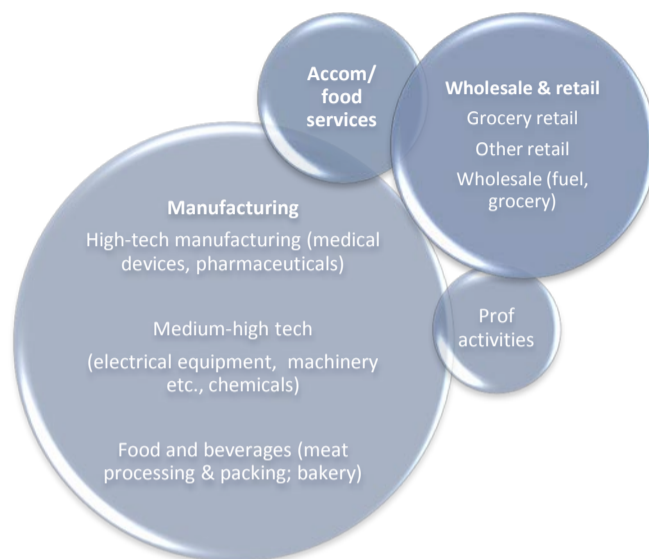




### Medium to large enterprises by sector

- The highest number of medium to large enterprises (employing 50 persons or more) in the West region is found in manufacturing, followed by wholesale/retail activities and accommodation/food services
- There are also some medium to large enterprises in professional activities (e.g. scientific R&D, architectural/engineering activities and legal/accounting activities).

Figure 9.3 Sectors with largest enterprises (West), 2013



Source: Analysis by SOLAS (SLMRU) based on Data Ireland database

Figure 9.4a Industrial units (West)

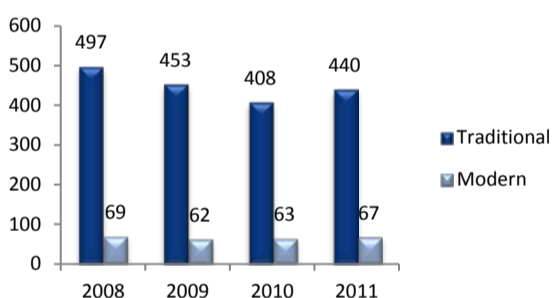
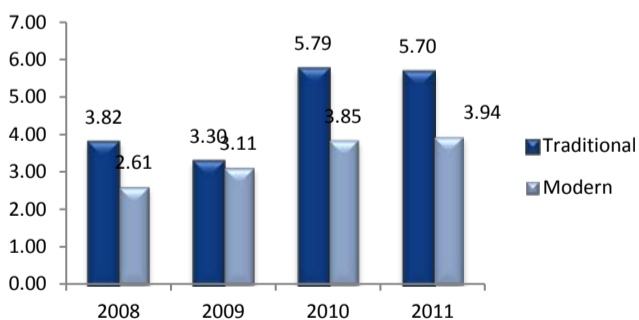


Figure 9.4b Gross output in industrial units (West), € billion



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

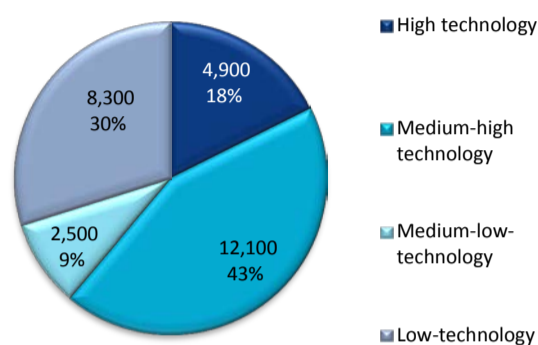
### Industrial activity

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

### Manufacturing employment

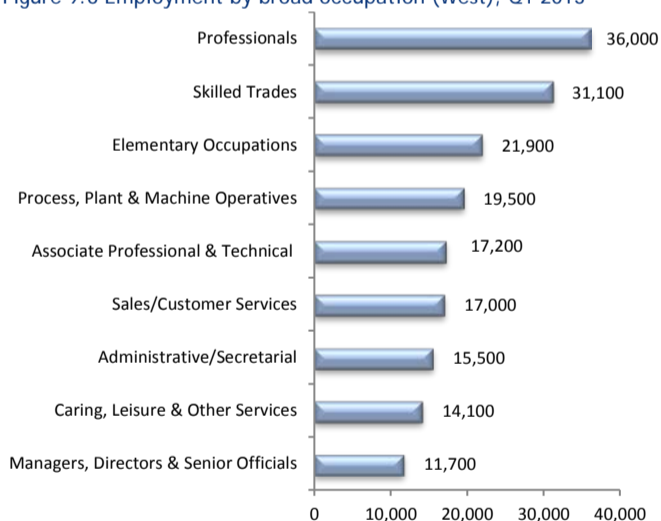
- In quarter 1 2013, 28,000 persons in the West were employed in manufacturing
- Employment was greatest in medium-high tech manufacturing (e.g. chemicals, electrical, transport equipment etc.) at 43%; a further 18% were employed in high tech manufacturing (e.g. pharma, electronics, optical products etc.), while medium-low tech manufacturing (e.g. rubber, plastic, fabricated metal etc.) and low-tech manufacturing (e.g. food processing, wood, printing etc.) accounted for 9% and 30% respectively
- At 43%, the West's share of employment in medium-high tech manufacturing was more than twice that of all other regions except the Mid West (at 24%).

Figure 9.5 Manufacturing employment (West), Q1 2013



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

Figure 9.6 Employment by broad occupation (West), Q1 2013



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

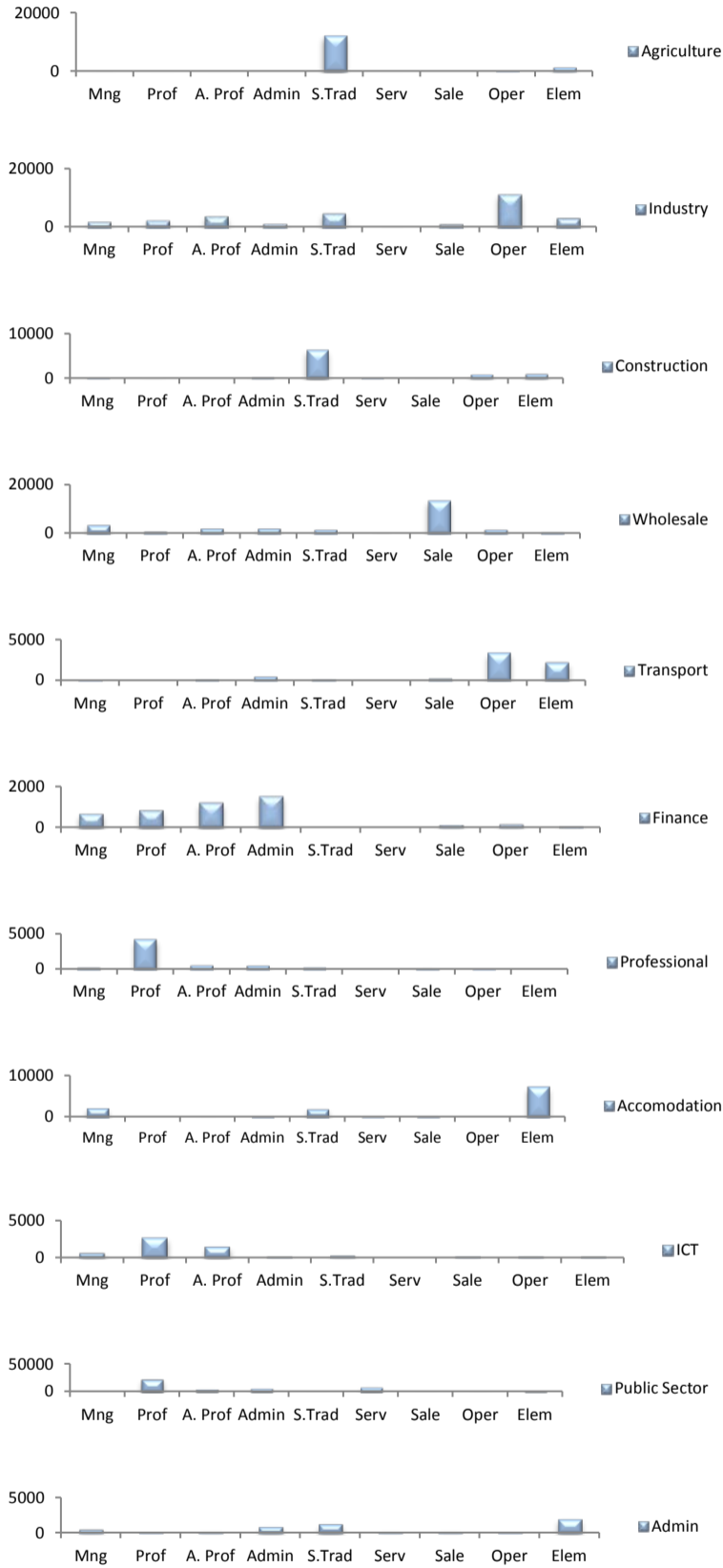
### Employment by occupation

- In quarter 1 2013, professional occupations accounted for 20% of the workforce in the West region
- Total white collar workers (managers, professionals, associate professionals and admin combined) amounted to 80,000 persons (or 44%) of region's workforce
- Skilled trades occupations employed 17% of the total workforce, of which 39% were farmers
- Elementary and operative occupations accounted for 12% and 11% of the total employment respectively.



West

Figure 9.7 Employment by broad occupation and sector (West) (000s), Q1 2013



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

### Employment by occupation and sector

- In quarter 1, 2013, almost two thirds of those working in industry were in operatives, elementary or skilled trades occupations; however, more than a fifth were high skilled workers (professionals or associate professionals)
- The wholesale/retail, transport and accommodation/food services sectors had relatively larger shares of low skilled occupations, with the majority of workers in sales, operative or elementary roles
- Most persons in the public sector (PAD, education and health), finance, ICT, and professional services were working in white collar occupations (as managers, professionals, associate professionals or secretarial/admin occupations)
- Within occupational groups, the highest employment was in the following occupations:
  - Managers:** shopkeepers/proprietors, functional managers, managers in hospitality/leisure services
  - Professionals:** teachers, nurses, IT professionals
  - Associate professionals:** business sales executives, sales accounts managers, lab technicians
  - Secretarial/admin:** Government clerks, and finance admin occupations (e.g. bank clerks, wages clerks)
  - Skilled trades:** farmers, chefs, fitters
  - Services:** care workers, hairdressers, childcare workers
  - Sales:** sales and retail assistants
  - Operatives:** assemblers/routine operatives, truck drivers, process operatives
  - Elementary:** cleaners, construction workers, catering staff.

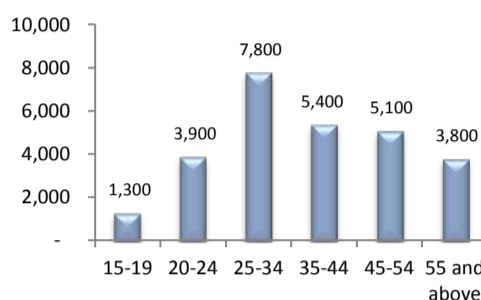


West

## Unemployment

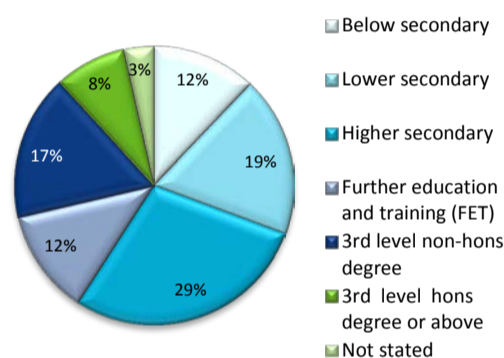
- In August 2013, there were 40,000 persons on the Live Register in the West region (a 4% decline on August 2012); of these, 16% were under 25 and 59% were male
- In quarter 1 2013, there were 27,000 unemployed persons in the West region in ILO terms (Figure 9.8)
- **Age:** 19% of unemployed persons were under 25 years old; the highest share of unemployed persons were aged 25-34
- **Education:** this region had the highest share of unemployed persons nationally who had lower secondary education or less; however, the West also had a higher than average share of persons with third level qualifications
- **Sector:** 42% of unemployed persons had previously been employed in industry, construction or wholesale/retail
- **Occupation:** the share of persons previously employed in most occupational groups was in line with the national average, with the exception of a higher share previously employed in caring occupations (primarily as care workers) and the lowest share from sales occupations when compared to other regions.

Figure 9.8 Unemployment by age (West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 9.9 Unemployment by education (West), Q1 2013



Source: Analysis by SOLAS (SLMRU) based on CSO

Figure 9.10a PES job seekers (West), Sept 2013

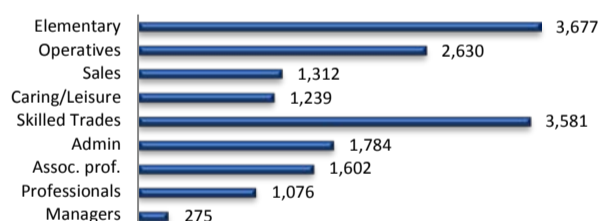
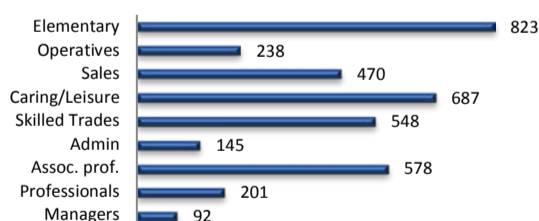


Figure 9.10b PES vacancies (West), Sept 2013



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

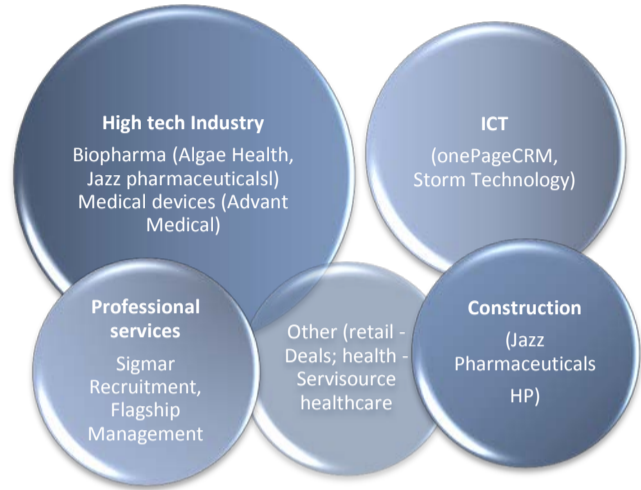
## PES job seekers and vacancies

- In September 2013, over 17,000 job seekers were registered with the PES; the highest number of job seekers had previously worked in elementary occupations (process plant, construction, catering/hospitality staff), skilled trades (carpenters, bricklayers) or operatives (process operatives, HGV/van drivers)
- Between Jan - Sept 2013, 3,800 vacancies were advertised through DSP Jobs Ireland; the highest number of vacancies was for elementary occupations (kitchen & catering assistants, cleaners, security), personal services (care workers, home carers), associate professionals (business sales executives, marketing associate professionals), and skilled trade workers (chefs).

Figure 9.11 Job creation announcements (West) 2013

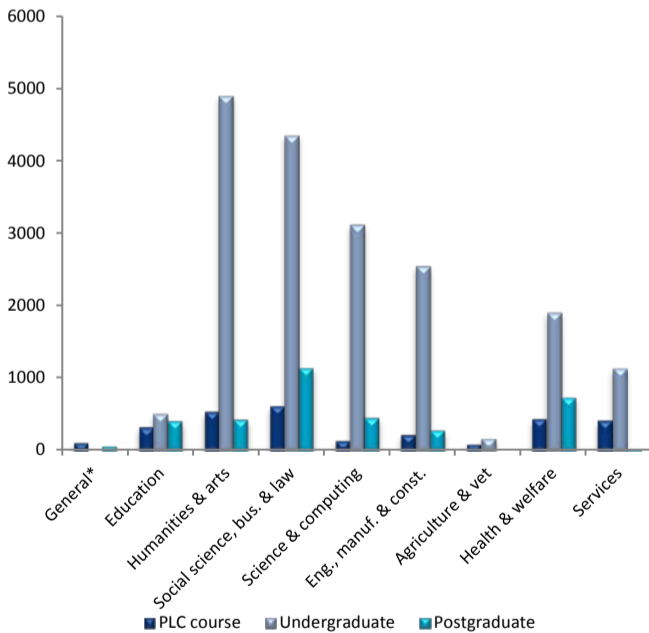
**Employment growth and job creation**

- Over the period quarter 1 2012 to quarter 1 2013, employment grew by 4%; however, employment change varied by sector:
  - the largest growth in employment, in numerical terms, in the West region was in wholesale/retail (2,400 or 10% growth), followed by industry and agriculture; employment in administrative and support service activities increased by 39%; (this sector contracted nationally by 5%)
  - declines in employment occurred in PAD, professional and financial activities
- Recent job announcements suggest that over the short to medium term job opportunities will arise in the high tech manufacturing and ICT sectors; the continued good performance of these sectors in the West region is also likely to lead to some temporary construction jobs in firms such as HP and Jazz Pharmaceuticals expand their facilities.



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

Figure 9.12 PLC course & higher education enrolments (West), 2012



Source: DES, HEA  
\* Includes general programmes and broad/combined fields of learning

**Education and training enrolments**

- There were over 25,000 students enrolled in selected further and higher education and training in the West in 2012; of these, there were
  - almost 3,000 PLC enrolments
  - almost 19,000 undergraduates
  - 3,600 at postgraduate level
- On PLC courses, social science, business and law had the highest number of learners (c 600, or 21%); this was followed by humanities and arts at approximately 500 learners (18%)
- At undergraduate level, humanities and arts had the highest number of enrolments (approximately 5,000 or 26% of the total)
- At postgraduate level, the highest number of enrolments, amounting to almost a third of the total, was for social science, business and law.

## Census (2011) data by county

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

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

Source: CSO Census 2011

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

Key points from the Census 2011 data include:

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

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

Una Halligan	Chairperson
Marie Bourke	Head of Secretariat & Dept. Manager, Education, Skills and Labour Market Policy, Forfás
Inez Bailey	Director, National Adult Literacy Agency
Peter Baldwin	Assistant Secretary, Department of Education and Skills
Ray Bowe	IDA Ireland
Liz Carroll	Training and Development Manager, ISME
Ned Costello	Chief Executive, Irish Universities Association
Margaret Cox	Managing Director, I.C.E. Group
Bill Doherty	Executive Vice-President of Cook Medical, Europe; Chief Executive Cook Ireland
Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Bryan Fields	Director, Curriculum Development/Programme Innovation, SOLAS
Sonia Flynn	EMEA Director, Facebook
Anne Forde	Principal Officer, Department of Education and Skills
Joe Hogan	Chief Technology Officer, Openet
Jerry Moloney	Director of Skills, Enterprise Ireland
Frank Mulvihill	Former President of the Institute of Guidance Counsellors
Brendan Murphy	President, Cork Institute of Technology
Dermot Nolan	Department of Public Expenditure and Reform
Alan Nuzum	Chief Executive Officer, Skillnets
Muiris O'Connor	Higher Education Authority
Peter Rigney	Industrial Officer, ICTU
Martin Shanagher	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Martin D. Shanahan	Chief Executive, Forfás
Jacinta Stewart	Chief Executive, City of Dublin VEC

## Appendix 2: Recent Expert Group on Future Skills Needs Publications

Report	Publication Date
Addressing Future Demand for High Level ICT Skills	November 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2013	July 2013
National Skills Bulletin 2013	July 2013
Future Skills Requirements of the Manufacturing Sector to 2020	April 2013
The Expert Group on Future Skills Needs Statement of Activity 2012	April 2013
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2013	February 2013
Vacancy Overview 2012	February 2013
Regional Labour Markets Bulletin 2012	January 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs	July 2012
National Skills Bulletin 2012	July 2012
Key Skills for Enterprise to Trade Internationally	June 2012
EGFSN Statement of Activity 2011	April 2012
Vacancy Overview 2011	February 2012
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise ( <i>Forfás report based on EGFSN identified future skills needs</i> )	February 2012
Addressing High-Level ICT Skills Recruitment Needs: Research Findings	January 2012
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs	July 2011
National Skills Bulletin 2011	July 2011
Developing Recognition of Prior Learning: The Role of RPL In the Context of the National Skills Strategy Upskilling Objectives	April 2011
Vacancy Overview 2010	March 2011
Future Skills Needs of Enterprise within the Green Economy in Ireland	November 2010
Future Skills Requirements of the Biopharma-Pharmachem Sector	November 2010
Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs 2010	July 2010
National Skills Bulletin 2010	July 2010
Future Skills Needs of the Wholesale and Retail Sector	May 2010



## Appendix 3: Glossary

The following abbreviations are used in throughout the document:

CSO	Central Statistics Office
DJEI	Department of Jobs, Enterprise and Innovation
DSP	Department of Social Protection
E	Employment
E rate	Employment rate
ESRI	Economic and Social Research Institute
ETB	Education and Training Boards
ILO	International Labour Organization
LF	Labour Force
LR	Live Register
NACE	Nomenclature statistique des activités économiques dans la Communauté européenne
P rate	Participation rate
PAD	Public Administration and Defence
PES	Public Employment Service
PLC	Post Leaving Certificate
QNHS	Quarterly National Household Survey
SOC 2010	Standard Occupational Classification 2010
UE	Unemployment

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Further Education and Training Authority