

# Regional Labour Markets Bulletin

## 2016

October 2016

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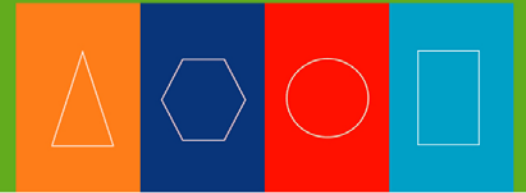
A Report prepared by the Skills and Labour Market  
Research Unit in SOLAS

October 2016

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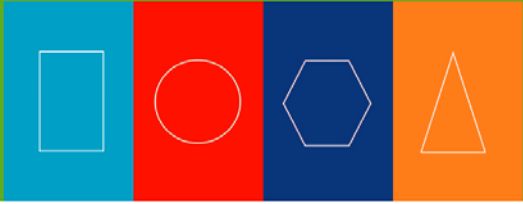


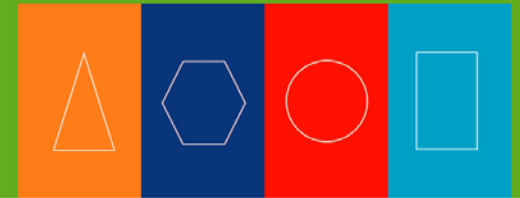


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## Foreword

The Regional Labour Markets Bulletin 2016 has been produced by the Skills and Labour Market Research Unit (SLMRU) in SOLAS on behalf of the Expert Group on Future Skills Needs. It is the fifth 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.



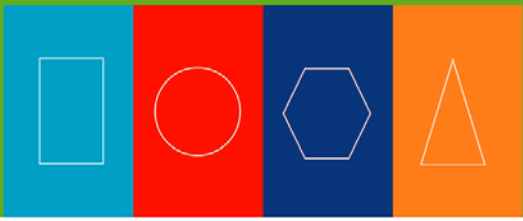
The Report provides a wealth of labour market intelligence statistics and outlines the regional enterprise landscape. As such, the report has already become an important input to the Regional Action Plan for Jobs and a key input to the Regional Skills Fora.

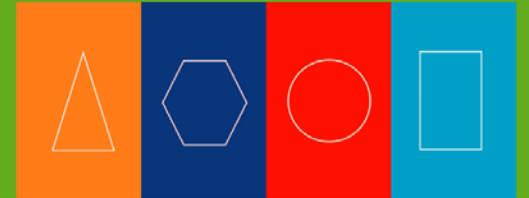
The Report leverages the national skills identification infrastructure that has continuously been developed in the SLMRU to provide up to date information, and it has become the reference point for the analysis of regional skills needs. The Report compiles relevant information including employment composition, employment permits to non-EEA nationals, job announcements, the job vacancies advertised through the public employment services, employment projections, and utilises the pioneering work on translating the analysis of labour market transitions to provide indications for regional skills requirements in the short term. It also presents the composition of unemployment, the skill profile of job ready job seekers, as well as information on regional skills supply from education and training. As such, it can be utilised to devise strategies to further align the skills development with enterprise needs at regional level. It is therefore of paramount importance to ensure that the regional skills supply is appropriately configured so that it can respond in a nuanced way to the demands of enterprises in a region and, in so doing, underpin and stimulate the on-going recovery and facilitate job creation efforts.

The Report presents a comprehensive profile of Ireland's regions and provides information of relevance for evidence based policy making in the areas of education and training provision, career guidance, as well as relevant labour market activation initiatives and associated services for job seekers at regional level.

The Report could also be utilised for assessing the pace of economic recovery at regional level by monitoring a number of relevant indicators. Finally, it provides an extremely useful reference point for monitoring the progress and implementation of Ireland's National Skills Strategy 2025 at regional level.

Una Halligan  
Chairperson, Expert Group on Future Skills Needs





## Executive Summary

The Regional Labour Markets Bulletin 2016 provides an overview of the Irish labour market at regional level with the objective of supporting the empirically driven decision making process in the areas of education and training provision, career guidance, as well as labour market activation initiatives.

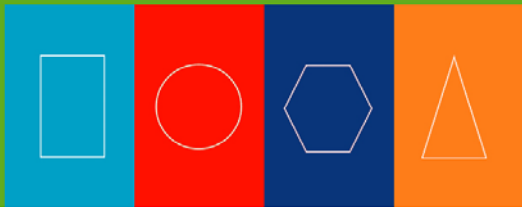
The report's overarching section presents a summary of regional business profiles, relevant labour market indicators, enterprise statistics, and education and training statistics, facilitating a comparison across the regions and between the regions and the State. The subsequent sections of the report are comprehensive profiles of each of Ireland's eight administrative regions: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.

The report highlights some differences across regions, such as the relative size of economic output, expressed in Gross Value Added, which can be used as a proxy for the concentration of higher value-added economic activities in a region. There were also differences in relation to the size of knowledge intensive services, industry (especially its relevant segments such as high tech manufacturing), as well as other sectors including agriculture, and the contribution these sectors make to regional economic output and, *inter alia*, the influence of business profiles and sectoral composition on regional labour markets. Aligned with this, there are differences in the profile of regional labour markets, namely the occupational composition of employment, such as the share of relatively highly skilled occupations. Finally, there are differences in terms of some key labour market indicators, namely participation rates, unemployment rates, and rates of employment across the regions; it is important to observe the changes regarding these indicators across regions over time.

There are also many similarities across the regions, such as the relative size of the broad public sector (in terms of employment), the composition of unemployment with regard to age, educational attainment, previous sector of employment and occupation, the profile of Public Employment Services (PES) job ready job seekers, and the composition of PES vacancies. Another common thread is that job opportunities continue to arise across all regions, and in a wide range of economic sectors, signalling demand for a diverse range of skills. Although job announcements were related to all regions, some regional variations could be observed in terms of both type and magnitude of skills required in the short to medium term. It is therefore of paramount importance to ensure that regional skills supply is appropriately configured so that it can respond in a nuanced way to the demands of enterprises in a region and, in so doing, to underpin and stimulate the on-going recovery and facilitate job creation efforts.

There appears to be a sizeable target group for a range of labour market and education and training initiatives in each region, as evidenced by the presence of young people who appear to be disengaged from the labour market, that is to say, who are neither employed nor in education or training ('NEET'). However, while the presence of young persons classified as NEET is common to all regions, their rate, expressed as a percentage of relevant age group, continues to vary between regions.

When interpreting the data, it should be borne in mind that while the report aims to profile the regional labour markets, sourcing of skills for the Irish labour market occurs at the State level with considerable mobility of labour across the country. In other words, the supply of skills emerging from education and

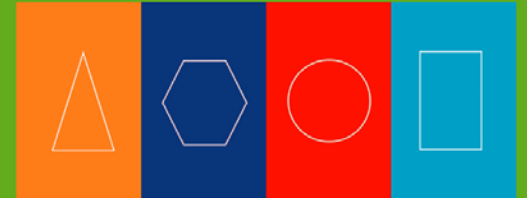


training in a region is not necessarily confined to that region. Equally, the job opportunities arising in a region are not limited or consigned to the local labour supply.

## Selected key points

### Business profile of regions

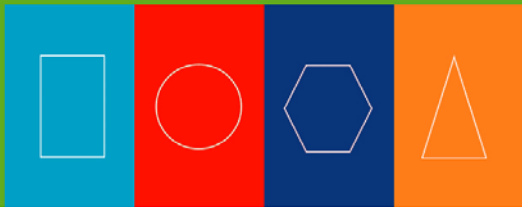
- Economic output, as expressed in Gross Value Added (GVA), where relatively high GVA can be taken as a proxy for the concentration of higher value-added economic activities: in 2013,
  - output per person in relative terms (expressed as an index relative to the State overall, where the State's average equals 100) was highest in Dublin, at 156.1; the South-West was the only other region to exceed the State's average; nevertheless, over the one-year period 2012 to 2013 most of the other regions, with the exception of the South-West and West, improved their relative position, signalling a movement towards the State's average
  - Dublin accounted for 43.3% of the State's total GVA, while the South-West accounted for 16.5%
  - in terms of the origins of GVA, the market and non-market services accounted for almost three quarters for the State; Dublin had the largest contribution by the services, at 85%.
  
- Industrial output value - industry is an important sector of economic activity for regions: in 2012,
  - the total value of industrial output in Ireland was €100.7 billion, of which more than a third was produced in the South-West region, and more than a fifth in Dublin; in contrast, the Midland and Border regions accounted for 3% and 5% respectively
  - over a half, €58.2 billion, was produced in the modern sector; the South-West region accounted for just over a third of the value of the total output produced in the modern sector, while Dublin accounted for 27%; conversely, the Midland and Border regions accounted for 1% and 2% respectively
  - within the regions, the Midland and Border regions had the lowest shares of output produced in the modern segment of industry, at 26% and 21% respectively, while there was an inverse picture in Dublin, where the modern sector accounted for three quarters of the industrial output produced in 2012.
  
- Active enterprises in the private business economy: in 2014,
  - nationally, the highest numbers of active enterprises were in construction (20%), wholesale & retail (19%), and professional services (16%); the information & communication and manufacturing sectors each accounted for 6% of active enterprises, real estate activities for 5%, and financial & insurance activities for 3%
  - Dublin accounted for almost one third of all active enterprises in the State; in addition, it accounted for more than a half of enterprises operating in the information & communication sector, for almost three fifths of all enterprises in financial & insurance activities, and for more than two fifths of enterprises in the professional, scientific & technical sector; conversely, it had the lowest relative share of enterprises operating in the construction sector, manufacturing, wholesale & retail and in accommodation & food services



- small and medium sized enterprises (SMEs) accounted for 99.8% of the total enterprise population in the State; consequently, in each region, the vast majority (over 90%) of enterprises were micro enterprises (with fewer than 10 persons engaged), with the Mid-East and Midland regions having the highest share of micro enterprises
  - at the State level, SMEs accounted for over two thirds (69%) of total persons engaged; Dublin had the biggest share of persons engaged in large (250 and above) enterprises, accounting for approximately a half of all persons engaged in the business economy in the region.
- Medium to large businesses: in 2015,
- focusing on companies employing 50 persons or more and operating in all sectors excluding agriculture, it is estimated that 18% of medium to large enterprises in the State were in industry, 17% were in wholesale & retail, and 11% in accommodation & food services.
  - Dublin had the highest number of medium to large enterprises in each sector; it accounted for about eight-in-ten of medium to large companies operating in the financial sector, for seven-in-ten in the information & communication sector, and for about three-in-five in professional services; the Midland region accounted for the smallest share across all sectors, with the exception of public administration & defence
  - the South-West region accounted for almost a fifth of medium to large companies operating in accommodation & food services, for 15% operating in industry and for the same share of medium to large companies operating in professional services
  - the Midland and Border regions had the largest share of large employers operating in industry

### Labour market indicators

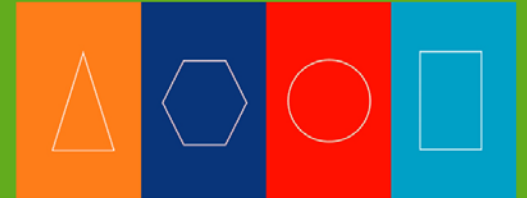
- Labour force and participation: in quarter 4 2015,
- Dublin had the largest labour force of approximately 660,400 persons, while the Midland region had the smallest, where approximately 135,400 persons were participating in the labour market
  - Dublin had the highest participation rate of 63.2%; the Border region had the lowest participation rate of 56.5%; apart from Dublin, the Mid-East and the Midland region, all other regions had a rate of participation that was lower than that of the State
  - year-on-year increases in the rate of participation were observed in the Border, Midland, and Dublin regions; in addition, these three regions, together with the South-East, reported increases over the five-year period quarter 4 2010 to quarter 4 2015.
- Employment:
- over the period quarter 4 2014 to quarter 4 2015, year-on-year increases in employment were observed in the Midland, Border, Dublin, and South-West regions at a faster rate than the average for the State; employment remained static in the Mid-West and South-East regions; it contracted in the West and Mid-East regions



- in quarter 4 2015, the highest employment rate (for those aged 20-64) was in Dublin (72%), followed by the Mid-East region (71%) and the South-West region (68.8%); all other regions had a rate that was below 69%.<sup>1</sup>
  - over the five-year period quarter 4 2010 to quarter 4 2015, employment expanded relatively strongly in the Midland, South-East and Dublin regions, by 17%, 11%, and 10% respectively, translating into 17,500, 19,500 and almost 60,000 additional persons in employment respectively; all other regions had a rate of growth in employment over the period that was below that for the State, while the West region actually reported a contraction in employment; over the above five-year period, employment grew at an annualised rate of 3.2% per annum in the Midland, and by 2% per annum in the South-East and Dublin regions; the above improvements notwithstanding, no region reverted to the levels of employment observed in 2007
  - with regard to the composition of employment, Dublin had the highest share of its employment in knowledge intensive services (KIS - namely market, high tech and financial services); indeed, employment in these high value added services accounted for 25% of employment in the region; consistent with this, Dublin had the highest share of employment in the information & communication sector, and subsequently, with over 47,000 employed, accounted for more than a half of total employment in the State in this sector
  - Dublin had the highest share of persons employed in relatively high skilled occupations; professionals comprised over a fifth (22%) of employment in Dublin; the Mid-East region had the second highest share, where the corresponding figure was 20%; Dublin, together with the Mid-East, had the highest share of associate professionals (14% in each) and persons employed in managerial occupations (10% in each).
- Inter-regional employment and commuting: in quarter 4 2015,
    - the prevalence of inter-regional commuting was the highest in the Mid-East region, where 40% of workers who resided in the region were employed in other regions, the majority of whom were employed in Dublin
    - commuting to work was also sizeable in the Midland region, where a quarter of those in employment were commuting to other regions, while in the Border, South-East and West regions the corresponding figure was about one-in-ten.
  - Vacancies - Public Employment Service (PES)/DSP Jobs Ireland vacancies: in 2015,
    - of almost 95,000 PES vacancies in the State, Dublin accounted for two-in-five of all vacancies, followed by the South-West and Mid-East regions, each accounting for about one-in-eight
    - the distribution of vacancies by occupation did not vary considerably across the regions, with the three broad occupational groupings - elementary, caring, leisure & personal services, and skilled trades occupations - accounting for the majority of vacancies; these three occupational groupings were the top three in six out of eight regions - the exception being the Midland and the South-East regions, with the vacancies for caring & leisure occupations in each region being exceeded by those for operatives and by those for administrative roles, respectively

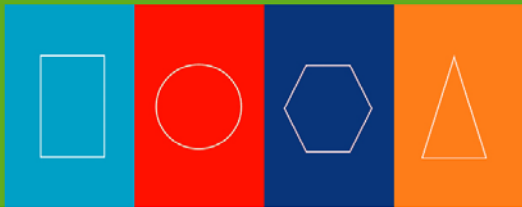
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<sup>1</sup> That is to say, below the national target of 69%-71% (Enterprise 2025 - Ireland's National Enterprise Policy 2015-2025), as adopted from the Europe 2020 Strategy - the employment rate is one of headline targets of the Strategy.

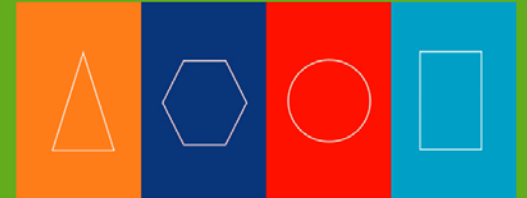


- the share of elementary occupations ranged from 16% in the Border to 26% in the South-West region, while the share of caring/leisure/personal services vacancies ranged from 11% in the Midland and South-East regions to 26% in the Mid-East region; there was less variation between the regions regarding the share of associate professionals, accounting for about one-in-ten of all vacancies in all regions, the exception being the West region, where they accounted for one-in-eight.
  
- Employment permits for non-EEA nationals: in 2015,
  - there were approximately 6,100 new employment permits issued to non-EEA citizens in the State, a 25% increase in relation to 2014
  - the majority (three-in-five) were issued for posts based in Dublin
  - three quarters were issued for professional occupations (mostly in the information & communication and health sectors); this occupational grouping accounted for the entire annual increase in new employment permits granted.
  
- Job announcements
  - Analysis of job announcements shows that,
    - job creation is set to continue across all regions
    - job creation is occurring in a wide variety of sectors, from knowledge-intensive activities such as information & communication, financial services, professional activities including R&D, and high-tech manufacturing activities such as pharmaceuticals and MedTech, to more labour intensive activities such as manufacturing of food & beverages, construction, wholesale & retail, and accommodation & food services
    - aligned with the above, job announcements signalled demand for a diverse range of skills
    - although there were job announcements nationwide, some regional variations could be observed in terms of both type and magnitude of skills required in the short to medium term.
  
- Regional employment projections
  - over the period 2012-2020, employment was projected to increase by 2% per annum for the State
  - although overall employment was projected to fully recover by the end of the projection period, the regional projections derived suggest that not all regions would necessarily see employment fully recovering and surpassing the levels observed prior to the 2008-2011 recession.

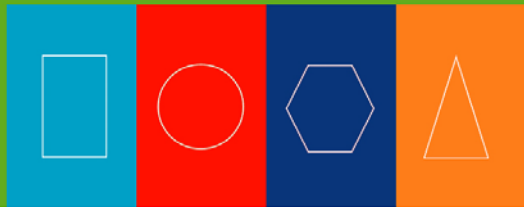




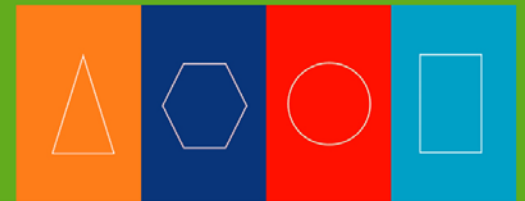
- Expansion and replacement demand
  - in addition to expansion demand, readily associated with the increase in net jobs added (e.g. estimated to be approximately 44,000 over the one-year period quarter 4 2014 to quarter 4 2015 for the State), job opportunities arise even in the absence of expansion demand owing to replacement demand, which is essentially labour market demand arising from retirements and other exits from employment
  - the importance of replacement demand as a source of job opportunities is reinforced given that over the one-year period quarter 4 2014 to quarter 4 2015 employment in some regions remained static or even contracted; based on the labour market transition analysis for 2015, it is estimated that, on average, about 6.6% of the workforce, that is to say, persons in employment, is replaced annually due to all combined exits into economic inactivity
  - based on the employment levels in quarter 4 2015 and the appropriate replacement rates derived from the analysis of labour market transitions for 2015, an estimate of replacement demand for each region by occupational grouping is derived and presented (Table 13)
  - the analysis of labour market transitions highlighted the above average replacement rates for elementary, sales & customer service, and caring/leisure/personal services occupations; on the other hand, below average replacement rates were observed for managers and skilled trades.
  
- Live Register
  - in May 2016, there were approximately 307,100 persons on the Live Register in the State, 11% lower than observed in the previous year
  - while the numbers on the Live Register declined in all regions year-on-year, the most pronounced decline was observed in the South-West and Mid-East regions (by 13.4% and 12.5% respectively); over the six-year period May 2010 to May 2016, the decline was most pronounced in the South-West and Mid-West regions, where the numbers signing on declined by more than a third
  - over the six-year period May 2010 to May 2016, the numbers on the Live Register peaked for most regions in July and August of 2011, while the lowest point was April 2016; the decline from the peak was most pronounced in the Mid-West and South-West regions (by 40% in each)
  - although the share of males on the Live Register declined in all regions compared with the situation a year ago, males still accounted for almost three-in-five of persons on the Live Register nationally; while the gender distributions were similar in each region, the highest share of males was in Dublin (61.3%) and the lowest share was in the Mid-East region (56.3%).
  
- Job ready job seekers registered with the Public Employment Service (PES), in April 2016:
  - when compared with the situation a year previously, the number of job ready job seekers declined in each region
  - the highest share of job ready job seekers in each region had previously worked in elementary occupations; the share ranged from 20% in the Mid-East to 26% in the South-East region
  - skilled trades were the second largest group, accounting for 16% of job ready job seekers in Dublin and for 20% in the South-West region.



- Unemployment: in quarter 4 2015,
  - at almost 12%, the South-East region had the highest rate of unemployment, followed by the Midland and West regions, at 10.9% and 10.6% respectively; each of these regions had a rate of unemployment that was more than one percentage point above the State's average
  - a sizeable number of unemployed, almost a quarter overall, had no previous employment experience, with the Midland region reporting the highest share, of almost a third
  - the South-East region had the highest rate of long term unemployment, while the Mid-East, Dublin and South-West regions had a rate of long term unemployment that was below the State's average rate of 4.7%
  - of those who stated previous employment, approximately a fifth had previously been employed in the construction sector; within regions, the number (and share) of unemployed persons previously employed in construction was higher than for any other sector, with the exception of the Mid-East and Dublin regions; in the former those previously employed in industry accounted for the highest share, while in the latter those previously employed in wholesale & retail were the most numerous
  - overall, in terms of previous occupations, those who were previously employed in skilled trades were the most numerous, closely followed by those who were in elementary occupations; the Border, Midland and Mid-West regions had the highest shares of unemployed persons who were previously employed in skilled trades
  - in the Border, South-East and Mid-West regions, at 32%, 31% and 30% respectively, the share of unemployed with at most lower secondary education was above the State's average; the Midland and South-West regions had the highest share of unemployed with some FET qualifications; the shares of the unemployed with some third level qualifications were relatively high in the West and Dublin regions
  - the youth unemployment rates were particularly elevated in the West, Midland and South-East regions, at 30%, 28%, and 27% respectively, while Dublin had the lowest rate, at 13%
  - the youth unemployment ratio - which effectively takes into account the delayed entry into the labour market due to staying in education for longer - was 10% in the West, Midland and South-East regions, which was about twice the ratio observed in other regions.
  
- Education and training
  - Education outputs:
    - at the level of the State, the total supply from the national education and training system, expressed as awards, amounted to almost 99,000 awards (NFQ 1-10); Dublin accounted for over a third (37%) of all national awards (NFQ 1-10), followed by the South-West region, which accounted for 16% of the total
    - there were approximately 32,300 major awards made by QQI to FET learners gaining QQI awards across levels 1-6 on the NFQ framework in the State in 2015; of these, Dublin accounted for 30%, while the South-West, South-East and Border regions each accounted for about one-in-seven; regarding the field of learning, the largest share, over a third, were for health & welfare; the share of awards in the field of business & law was 15%, the share of awards in arts/humanities was 13%, while 11% were in services



- there were approximately 66,500 higher education awards (NFQ 6-10) made to learners at institutes of technology (IoTs) and universities; Dublin accounted for 40% of all higher education awards; the Border region had the highest share of its awards in engineering & construction, followed by the Mid-West and South-East regions, while the Mid-East had the lowest share of its awards in this field; the South-East had the lowest share of its awards in the field of science & maths (only 3%), while the corresponding figure for the Border, West, Mid-East, and South-West was 10%.
  
- Education related indicators: in quarter 4 2015,
  - third level achievement expressed as the share of population aged 30 to 34 with completed tertiary education ranged from 35% in the South-East region to 65% in Dublin
  - the share of the population (aged 25 to 64 years) that engaged in lifelong learning ranged from 4.6% in the Border to almost 10% in Dublin
  - in each region, there appears to be scope for enhancing skill supply in the future by further promoting the engagement of young people with the education and training system
    - there remains a sizeable section of young people in each region that are classified as NEET; the highest NEET rate (for those younger than 25) was in the Midland (19%), followed by the South-East region (16%), while the lowest rates were in the Mid-West (10%) and Dublin regions (9%); it is also worth noting that the NEET rates for those aged 25 to 34 were even higher, exceeding 20% in three regions (Border, West, and South-East)
    - early leavers from education and training - the share of early leavers was above the national average in the Border, Midland, West, and South-East regions.



## Introduction

The Regional Labour Markets Bulletin 2016 provides an overview of the labour market at regional level with the objective of supporting the decision making process in the areas of labour market policies, career guidance and education, including higher education and further education and training provision. The report provides the key statistics regarding the supply and demand for skills in each of the eight NUTS 3 regions (NUTS-Nomenclature of Territorial Units). The NUTS 3 regions are: Border, Dublin, Mid-East, Midland, Mid-West, South-East, South-West and West.<sup>2</sup>

### NUTS 3 regions in Ireland

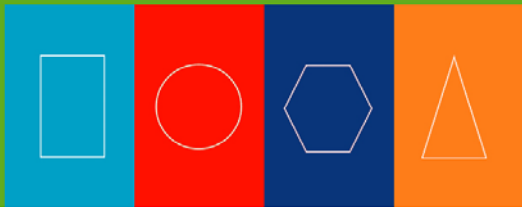
Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West
Cavan	Dublin City	Kildare	Laois	Clare	Carlow	Cork City	Galway City
Donegal	Dun Laoghaire	Meath	Longford	Limerick City	Kilkenny	Cork County	Galway County
Leitrim	Fingal	Wicklow	Offaly	Limerick County	South Tipperary	Kerry	Mayo
Louth	South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

The regional analysis draws on data from a variety of sources compiled and maintained by the SLMRU (SOLAS), namely: CSO Quarterly National Household Survey (QNHS), DataIreland (Kompass company database), Department of Social Protection (DSP) Jobs Ireland Vacancies, DSP Job Seekers (Client Services System), Higher Education Authority (HEA), QQI Ireland, IDA, media (newspapers, press releases, etc.), as well as CSO StatBank (CSO Main Data Dissemination Service, providing access to CSO Census of Industrial Production, CSO Business Demography, CSO Live Register, CSO National Accounts, etc.).

When interpreting the data, the following should be borne in mind:

- The report aims to profile the regional labour markets; however, sourcing of skills for the Irish labour market occurs at a national level with significant geographical mobility of labour across the country, which is actually illustrated in the report, with a sizeable prevalence of inter-regional commuting in some regions; in other words, the supply emerging from education and training in a region is not confined to that region, just as the job opportunities arising in a region are not restricted to the labour supply of that region.

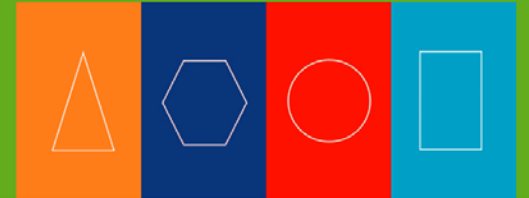
<sup>2</sup> The regional analysis is based on the NUTS 3 regional classification, which is used by the Central Statistics Office (CSO). The NUTS3 regions correspond to the eight Regional Authorities established under the Local Government Act, 1991 (Regional Authorities) (Establishment) Order, 1993, which came into operation on 1 January 1994. The NUTS 3 classification differs from the Education and Training Boards (ETB) regions. For instance, in the NUTS 3 classification, Mayo is classified in the West region, while in the ETB classification, Mayo is grouped with Sligo and Leitrim, which the NUTS 3 classifies as the Border counties.



- The report uses the most recent data available at the time of analysis. It should be noted, however, that the time periods associated with the latest available data vary across data sources (e.g. the latest employment data at occupational level is for the period October to December (quarter 4) 2015, vacancy data presented covers the whole year (2015); higher education (HE) awards data refers to 2014; further education & training (FET) awards data is for 2015; DataIreland enterprise data refers to 2015; Business Demography refers to the period 2008-2014; the latest data from the Census of Industrial Production refers to 2012, while the data for County Incomes and Regional GDP presented in the report are for 2013, given that the data for 2014 are estimates; the most recent data for Live Register are for (May) 2016; other CSO data available via CSO StatBank may refer to various years).
- Announcements regarding job creation in the media are characterised by a certain lead-time, and while for some the short term horizon may well be pertinent, one should be cognisant of the fact that it may take a number of years for the jobs announced to materialise.
- The units of measurement, concepts, and relevant definitions differ across data sources (e.g. the CSO in the QNHS uses the ILO definition of employment and unemployment,<sup>3</sup> and the main unit of analysis is an individual; Business Demography counts both active enterprises and persons engaged in the population of active enterprises,<sup>4</sup> with a similar approach adopted in the Census of Industrial Production); finally, while in County Incomes and Regional GDP, both counties and NUTS 3 regions are the main units of analysis, the report focuses on the regional economic output.
- In many instances, the data at regional level from the QNHS are too small for reliable statistical inferences to be made, and may be subject to statistical errors (e.g. observations translating into less than 1,000 cannot be reported for any statistics based on the QNHS); in addition, changes over time in some cases may be variations caused by sampling, rather than denoting an underlying or observable trend, and this, aligned with the above, was the main reason for not reporting employment in two sectors in the Midland region.
- Occupational classifications differ across data sources and some accuracy is lost when mapping one classification to another (e.g. regarding the vacancy data, DSP uses MANCO, while the CSO uses the Standard Occupational Classification (SOC) 2010).
- In relation to vacancy data, only vacancies advertised through the Public Employment Service (DSP Jobs Ireland) are presented; it should be borne in mind that the PES vacancy data is a subset of all vacancies advertised nationally and therefore underrepresents the total vacancy market in the State, and by extension, in regions.
- In each region, recent examples are given of companies which announced, through the media (e.g. newspapers, online media, etc.), the creation of jobs in the short-medium term; this is not an exhaustive list and is for illustrative purposes only; much of the job creation amongst micro or small

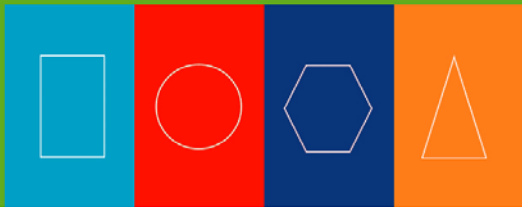
<sup>3</sup> Based on International Labour Office definition, the employed population consists of those who during the reference week did any work for pay or profit for at least one hour, or were not working, but had jobs from which they were temporarily absent. Unemployed comprise persons aged 15 to 74 who: are without work during the reference week, are available to start work within the next two weeks, and have been actively seeking work in the past four weeks, or had already found a job to start within the next three months.

<sup>4</sup> The enterprise population figures for the years 2006 to 2009 were revised due to an increase in coverage of very small enterprises in the CSO's Business Register; the revisions have the effect of adding 3.7% to the total number of enterprises and 0.5% to the total number of persons engaged for the year 2009, as reported in the Regional Labour Markets Bulletin 2015. Furthermore, since then, and as result of methodological changes, namely the implementation of the new enterprise definition, the number of enterprises in the private business economy in 2012 has increased from 185,530 in the old series to 244,394 in the new series, an increase of nearly 59,000 enterprises (latest figures available for the old series is 2012, as reported in the Regional Labour Markets Bulletin 2015). Almost 32,000 (or 54.2%) of the increase in enterprise numbers is directly attributable to Sector H "Transportation and Storage" (increase of 16,347 enterprises) and Sector F "Construction" (increase of 15,561 enterprises).



companies may not be announced in the media; finally, while job creation expected to arise from foreign direct investment supported by the Industrial Development Agency (IDA) is informing the assessment, not all projects in the pipeline could be identified or depicted due to confidentiality reasons.

- The education and training overview presented in the report, while rather comprehensive, nevertheless only covers a sub-set of all provision, namely
  - with regard to FET, data and statistics reported are confined to those gaining (major) QQI awards; equally, FET awards by other award bodies (e.g. City & Guilds) are not included
  - HEA data refers to the HEA-aided sector; while the data and statistics presented in the report comprise the overwhelming majority of HE awards in 2014, it is estimated that there were approximately 5,000 higher education awards made by the Quality and Qualifications Ireland (QQI) in 2014 to learners outside the HEA-aided sector (e.g. private providers).
- The term 'industry' is broader than 'manufacturing'; the industrial sector includes manufacturing (making up the largest share), extraction/mining, and utilities (e.g. power supply, etc.).
- Knowledge intensive services (KIS) - Eurostat defines the following sectors as knowledge-intensive services, where aggregations are made at NACE 2 digit level:
  - knowledge-intensive market services (water and air transport, legal and accounting, management consultancy, architectural and engineering, advertising and market research, other scientific and technical activities, employment and security related activities - corresponding to NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80)
  - knowledge-intensive financial services (financial and insurance services- corresponding to NACE Rev. 2 codes 64, 65, 66)
  - high tech knowledge-intensive services (ICT excluding publishing, research and development activities - corresponding to NACE Rev. 2 codes 59 - 63, 72), and other knowledge-intensive services (public administration & defence, education, health and social work, arts, entertainment and recreation, publishing and veterinary activities - corresponding to NACE Rev. 2 codes 58, 75, 84 - 93)
  - the focus in the report is on knowledge-intensive high tech, market and financial services, since other knowledge-intensive services include the public sector activities, which are reported separately.
- While cognisant of the fact that a share of healthcare and education is provided by the private sector, in the report, these two sectors (together with public administration & defence) are referred to as 'the public sector', given the significant share of State provision and funding of services in these areas.
- The information and communication sector includes computer programming, telecommunications, information services, publishing and broadcasting; it does not include ICT equipment manufacturing or wholesale activities in computers, computer peripheral equipment and software; however the widely accepted convention is to use the acronym 'ICT' when referring to the information and communication sector and these two terms are used interchangeably throughout the Report.
- Regional Accounts are produced annually by CSO and provide estimates of Gross Value Added (GVA) for the two overall NUTS 2 regions and the eight Regional Authorities (equivalent to the NUTS 3 regions); Gross Value Added (GVA) is a measure of the value added generated by the production of



goods and services. Total GVA is equivalent to GDP<sup>5</sup>; it includes the profits (arising in the State) of companies operating in a region, a considerable amount of which may accrue to non-residents. In addition, as illustrated in the report, the Mid-East region and the Dublin region are affected by a substantial proportion of their workforce living in one region and commuting to work in another. In practice, this increases the GVA of the Dublin region, being the region to which most of the commuting to work takes place, and being the region that is the location of a relatively large number of businesses where final products (i.e. made at the end of a production process) and services are produced and delivered.<sup>6</sup>

## Report Structure

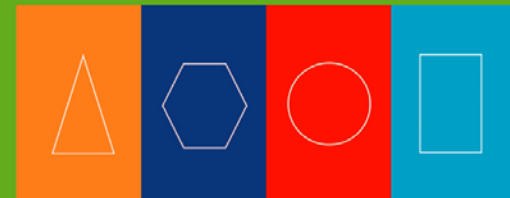
The report begins with an overarching chapter where all relevant labour market data, statistics, and associated indicators are presented for all regions, thereby providing a brief profile for each region but also allowing regional comparisons to be made. This chapter is followed by eight chapters, each focusing on one of Ireland's eight administrative (NUTS 3) regions, where more detailed region-specific statistics are presented.

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<sup>5</sup> Gross Value Added (GVA) at basic prices is a measure of the value added generated by the production of goods and services. In the valuation at basic prices output is priced at the value received by the producer less product taxes payable (e.g. VAT, excise duties, etc.) plus subsidies receivable on products. Total GVA, when valued at market prices, is equivalent to GDP at market prices. GDP and GVA both measure the value of the goods and services (or part thereof) which are produced within a region or country. GDP is valued at market prices and hence includes taxes charged and excludes the value of subsidies provided. GVA at basic prices on the other hand excludes product taxes and includes product subsidies; GVA at basic prices appears best suited to capture regional GDP.

<sup>6</sup> CSO, Statistical Yearbook of Ireland 2012; CSO, County Incomes and Regional GDP 2013, February 2016.





## 1. Overview of the Regions

This section presents a comprehensive summary of relevant labour market statistics and indicators for each region and for the State. It also provides a brief outline of business profiles of regions. By providing a summary of wide range of indicators on labour market demand (employment, vacancies, employment permits, regional recruitment requirement) and supply (unemployment, outputs from education and training, Live Register, job-ready job seekers), the section facilitates a comparison between regions and between the regions and the national average in terms of main labour market and associated indicators.

### Business profile of the regions

Table 1 shows Gross Value Added (GVA) for each region and the State, GVA per person (at basic prices), indices of GVA per person (relative to an average of 100 for the State), and the share that each region contributes to the State's total GVA. While allowing for the possibility that some people and/or enterprises in one region may be contributing to the GVA in other regions, the relatively low level of GVA in a region can nevertheless indicate that it is lacking in higher value-added economic activities. In 2013, output per person in relative terms (as measured by GVA and expressed as an index relative to an average of 100 for the State) was relatively low in the Midland and Border regions, amounting to 59 and 60.5 respectively. It was highest in Dublin, at 156.1, while the South-West region had the second highest value (113.9). Apart from Dublin, the South-West was the only other region to exceed the State's average GVA per person.

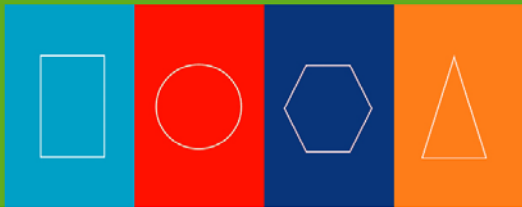
Table 1. Gross Value Added by region, per person (€), GVA indices, and the share of the State's total (2013 and 2012)

Gross Value Added (GVA) indicators	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
GVA (Euro Million, 2013)	11,093	70,811	12,952	5,936	11,168	12,543	26,961	12,008	163,474
GVA per person (Euro), 2013	21,445	55,365	24,276	20,923	29,305	25,092	40,384	26,839	35,464
Indices of GVA per person (State=100), 2013	60.5	156.1	68.5	59	82.6	70.8	113.9	75.7	100
GVA (%), 2013	6.8	43.3	7.9	3.6	6.8	7.7	16.5	7.3	100
GVA (Euro Million, 2012)	9,935	67,225	12,384	5,356	10,610	11,800	29,510	12,773	159,591
GVA p.p. (Euro), 2012	19,307	52,838	23,333	18,976	27,987	23,730	44,434	28,698	34,804
Indices of GVA per person (State=100), 2012	55.5	151.8	67	54.5	80.4	68.2	127.7	82.5	100
GVA (%), 2012	6.2	42.1	7.8	3.4	6.6	7.4	18.5	8.0	100

Source: CSO StatBank, County Incomes and Regional GDP

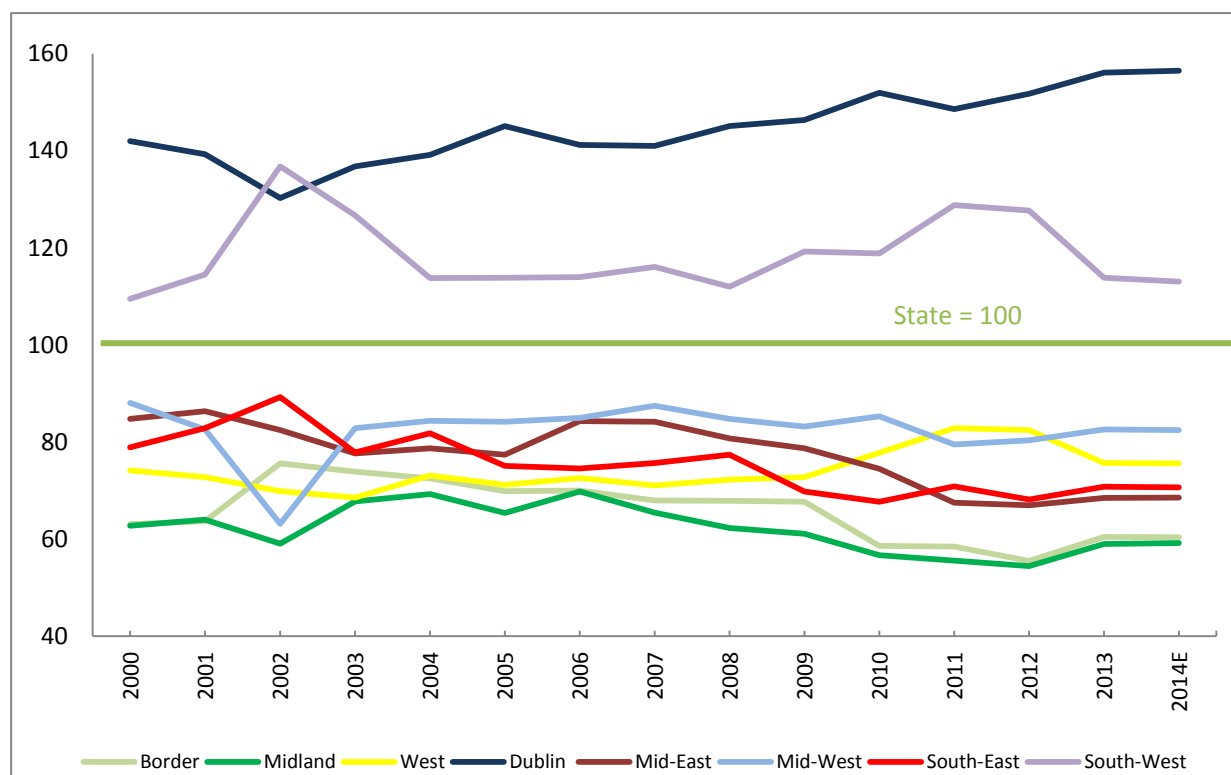
Over the one-year period 2012 to 2013, all regions, with the exception of the South-West and West, reported an improvement in their relative position, as captured by the indices of GVA, signalling a movement towards the State's average.





In 2013, the Dublin region accounted for 43.3% of the State's total economic output (GVA), the South-West for 16.5%, while all other regions accounted for considerably less. (Table 1; Figure 1)

Figure 1. Regional economic output over time - Indices of Gross Value Added (GVA) per person by region, 2000-2014\* (State = 100)



Source: Analysis by SOLAS (SLMRU) based on CSO County Incomes and Regional GDP 2013

\*2014 figures are estimates.

In terms of the origins of GVA for the State, the market and non-market services accounted for almost 72.5%, manufacturing, building & construction for just over a quarter, while agriculture, forestry and fishing for just 1.4%. With regard to the regional picture, the South-East region had the largest share of output originating from agriculture, forestry & fishing, at 3.5%, followed by the Border region, where the corresponding figure was 3%. The manufacturing, building & construction activities accounted for 44% of the economic output in the South-West region, the largest share of all regions.

Dublin had the largest contribution to its economic output by the market and non-market services, at 85%. Consistent with this, it had the lowest contribution by manufacturing, building and construction activities, at 15%. (Figure 2)

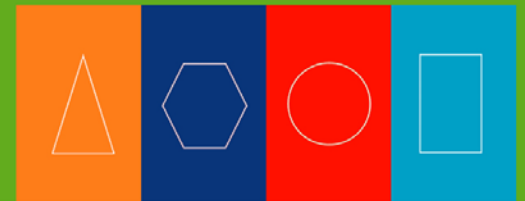
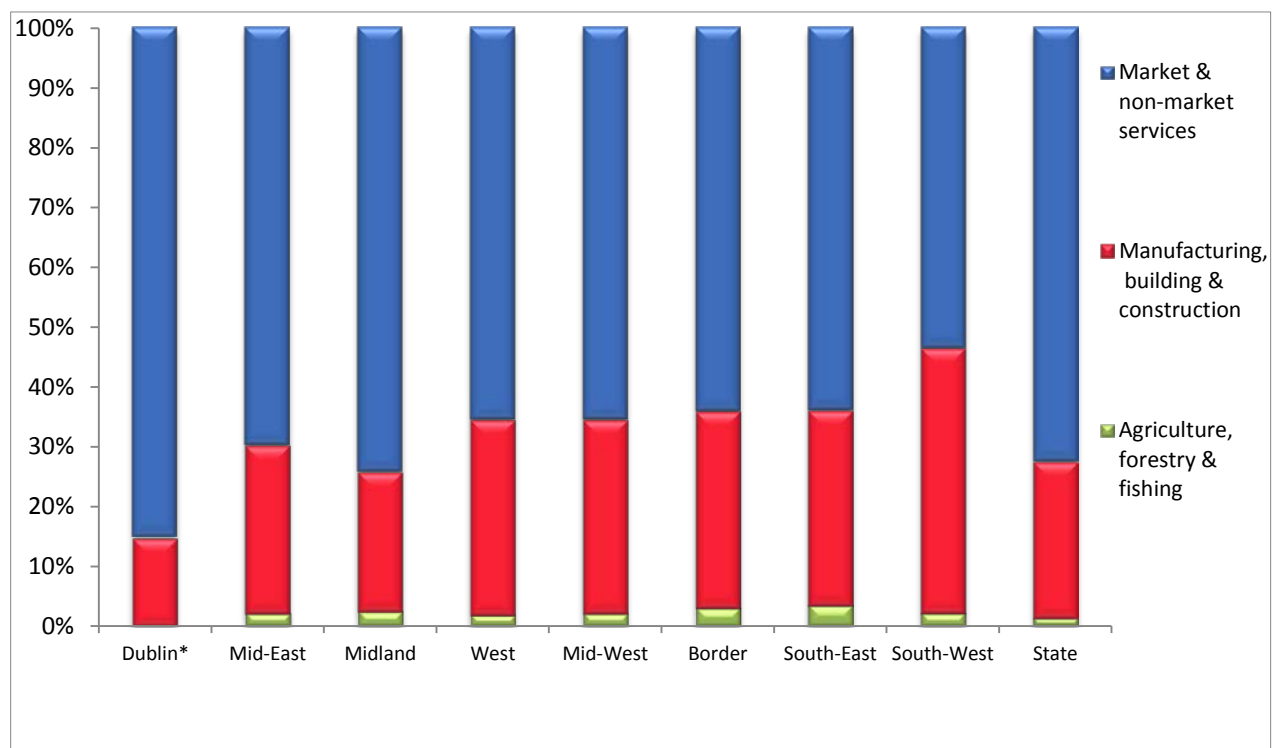


Figure 2. Sectoral distribution of regional GVA (% share, at basic prices), 2013



Source: CSO County Incomes and Regional GDP 2013

\*The share of agriculture, forestry & fishing in Dublin is 0.1%.

Although services account for the largest share of economic output, industry remains an important source of economic activity and employment. Thus in 2012, the total value of industrial output in Ireland was €100.71 billion. At the level of the State, the value of industrial gross output in the modern sector was €58.2 billion, while the value of output in the traditional sector was €42.5 billion. Across the regions, there were differences in the relative size of the modern segment. In Dublin, the modern segment accounted for three quarters of the value of output, whereas in the Border region it accounted for one fifth. (Table 2a)

There were also discernible differences in the relative size of the industrial sector and its contribution to the economic output. The South-West region alone accounted for just over a third of the State's industrial output in 2012, while Dublin accounted for just over a fifth. In contrast, the Midland and Border regions accounted for 3% and 5% respectively. These two regions also had the lowest shares of output produced in the modern segment. When compared to 2011, the value produced in the modern sector declined in the West, South-West, Mid-West, and Border regions; it increased in the South-East, Dublin, Midland and Mid-East regions. (Table 2b)

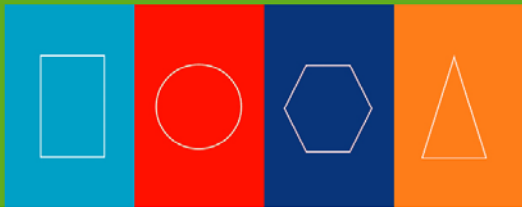


Table 2a. Gross output in industrial local units by region, 2012 (€ billion)\*

Industry sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	NA**	Ireland
Modern	1.16	16.0	4.3	0.7	3.4	7.4	22.5	2.7	-	58.2
Traditional	4.26	5.0	3.5	2.1	2.8	4.2	11.6	5.5	-	42.5
Industry total	5.4	21.0	7.8	2.8	6.25	11.6	34.0	8.1	3.7	100.7

Table 2b. Gross output in industrial local units by region, 2012 (%)

Industry sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	NA**	Ireland
Modern	2%	27%	7%	1%	6%	13%	39%	5%	-	100%
Traditional	10%	12%	8%	5%	7%	10%	27%	13%	-	100%
Industry total	5%	21%	8%	3%	6%	12%	34%	8%	4%	100%

Source: CSO (Census of Industrial Production, 2012)

\* Note: Industry includes mining, manufacturing, energy and utilities sectors; the traditional sector includes NACE (Rev.2) codes: 05 to 17, 181,19, 22 to 25, 28 to 31, 321 to 324, 329, 33, 35 to 39; the modern sector includes NACE (REV.2) codes: 20, 21, 26, 27, 182, 325; the Census of Industrial Local Units covers all industrial local units with three or more persons engaged.

\*\* The industry total for the State includes the non-attributable (NA) category; therefore, neither the regional total percentages for the traditional sector nor for industry total rows add up to exactly 100%.

At the State level, over the period 2009 - 2012, the number of persons engaged in manufacturing units that exported (at least some part of their output) declined by 8.8%, while the contraction in the number of persons engaged in manufacturing units that did not export any of their output was relatively greater and amounted to 10.9%. While a fall in the number of persons engaged in manufacturing units that exported was observed across all regions over the period 2009 - 2012, the Dublin and the Border regions reported an increase in the number of persons engaged in manufacturing units that did not export.

Table 3 shows the number of active enterprises by economic sector in 2014. There were 238,249 active enterprises in the private business economy in Ireland.<sup>7</sup> The highest numbers of active enterprises were in construction (20%), wholesale & retail (19%), and professional services (16%). The information and communication sector and manufacturing each accounted for 6% of all active enterprises in the State, accommodation & food services for 7.5%, real estate activities for 5%, while financial & insurance activities accounted for 3%.

<sup>7</sup> Source: CSO Business Demography. The private business economy covers the NACE Rev. 2 sectors B-N (excluding activities of holding companies). The NACE Rev. 2 sectors are: B - Mining and Quarrying, C - Manufacturing, D - Electricity, Gas, Steam and Air Conditioning Supply, E - Water Supply; Sewerage, Waste management etc., F - Construction, G - Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles, H - Transportation and Storage, I - Accommodation and Food Service Activities, J - Information and Communication, K - Financial and Insurance Activities (excludes NACE code 64.20 activities of holding companies), L - Real Estate Activities, M - Professional, Scientific and Technical Activities, N - Administrative and Support Service Activities. Recently, the coverage of business demography statistics has been extended to the education sector (N), included in the Table 3, and to the Arts, Entertainment & Recreation sector (R), not included since not yet available at regional level.

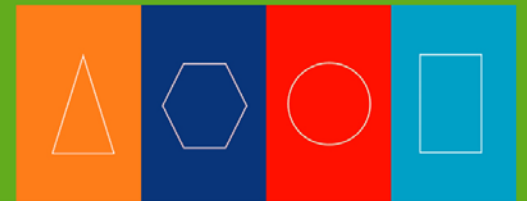


Table 3. Number of active enterprises by business economy sectors, by region<sup>8</sup>, 2014

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Not known	Ireland
Mining and quarrying (B)	27	44	*	27	24	9	18	52	*	411
Manufacturing (C)	1,834	2,918	1,659	957	1,353	1,817	2,340	1,468	283	14,628
Electricity, gas, etc. (D)	33	149	*	8	32	10	21	17	*	483
Water, sewerage, etc. (E)	150	190	105	73	76	114	149	109	9	975
Construction (F)	5,866	9,885	5,915	2,929	3,940	5,244	7,398	5,758	415	47,349
Wholesale & retail (G)	5,506	11,852	4,820	2,704	3,833	4,919	6,843	4,554	588	45,618
Transport & storage (H)	2,124	10,642	2,891	1,013	1,549	1,687	2,848	1,746	95	24,595
Accommodation & food (I)	2,348	3,688	1,511	972	1,762	2,010	3,162	2,264	73	17,790
Information & Comm.	698	7,245	1,435	342	718	726	1,368	927	228	13,687
Financial & insurance (K)	315	3,763	477	149	374	293	604	299	127	6,593
Real estate activities (L)	1,222	4,006	1,331	550	763	975	1,596	1,341	128	11,912
Professional activities (M)	2,657	16,104	4,243	1,370	2,561	2,905	5,820	2,745	390	38,795
Admin. support (N)	1,342	5,229	1,697	709	1,417	1,326	2,113	1,260	320	15,412
<i>Business economy (B-N)</i>	<i>24,246</i>	<i>75,716</i>	<i>26,164</i>	<i>11,862</i>	<i>18,419</i>	<i>22,166</i>	<i>34,386</i>	<i>22,619</i>	<i>2,672</i>	<i>238,249</i>
Education	1,310	3,594	1,504	447	1,146	1,325	1,899	1,456	*	12,986
<b>All sectors **</b>	<b>25,556</b>	<b>79,310</b>	<b>27,668</b>	<b>12,309</b>	<b>19,565</b>	<b>23,491</b>	<b>36,285</b>	<b>24,075</b>	<b>2,672</b>	<b>251,235</b>

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

\* Indicates that the data has been suppressed by the CSO to protect the confidentiality of individual enterprises. This issue arises for some business economy sectors at a county level.

\*\* Business Economy (B-N) and Education combined.

The Dublin region accounted for almost one third of all active enterprises in the State. It accounted for more than a half (53%) of enterprises active in the information & communication sector, for almost three fifths of all enterprises in financial & insurance activities, and for more than two fifths of enterprises in the professional, scientific & technical sector.

Considering the business profile of each region, the Dublin region had over a fifth of its active enterprises operating in the professional, scientific and technical sector, the highest share of all regions; at 17%, the South-West region had the second highest share, while the corresponding figure in the Border and Midland regions was 11%. At 10%, the share of enterprises operating in the information & communications sector in Dublin was the highest, almost twice the State average. The share of enterprises operating in the construction sector ranged from one fifth to one quarter in all regions with the exception of Dublin, where it was only 13%, relatively the lowest. Dublin also had the lowest share of enterprises operating in manufacturing, in wholesale & retail and in accommodation & food services.

<sup>8</sup> The geographical breakdown is based on the address at which an enterprise is registered for Revenue purposes. Where an enterprise has local units in several counties, but one head office where all employment is registered, all its employees are counted against the county where the head office is located. The county breakdown is based on the address at which an enterprise is registered for Revenue purposes, rather than where the business actually operates from, because no comprehensive administrative source is currently available for business locations. In particular, where an enterprise has local units in several counties, but one head office where all employment is registered, all its employees will be counted against the county where the head office is located. The county Tipperary enterprises were assigned to the Mid-West and the South-East regions based on estimates.

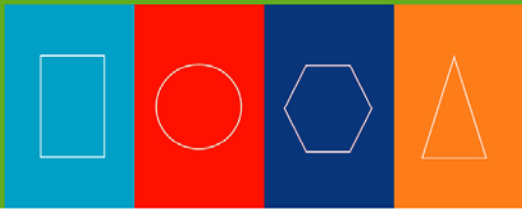


Table 4a presents the share of active enterprises, by size, in the private business economy, for each region in 2014. Small and medium sized enterprises (SMEs) accounted for 99.8% of the total active enterprise population. In each region, the vast majority of enterprises were micro enterprises (with fewer than 10 persons engaged) - over 90% in all regions. The Midland region had the highest share of micro enterprises.

Table 4a. Active enterprises (numbers) by enterprise size and region, 2014 (%) \*

Enterprise size	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Under 10	92.3%	91.1%	93.6%	95.8%	92.8%	92.8%	92.5%	93.6%	92%
10 - 19	4.4%	4.2%	3.8%	1.5%	4.0%	4.0%	4.3%	3.4%	4%
20 - 49	2.2%	2.7%	1.8%	2.0%	2.2%	2.2%	2.0%	2.0%	2%
50 - 249	1.0%	1.5%	0.7%	0.7%	0.9%	0.8%	1.0%	1.0%	1%
SME (< 250) share	99.9%	99.6%	99.9%	99.97%	99.8%	99.8%	99.8%	99.9%	99.8%
250 and over	0.1%	0.4%	0.1%	0.03%	0.2%	0.2%	0.2%	0.1%	0.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Table 4b. Active enterprises (persons engaged) by enterprise size and region, 2014 (%)\*

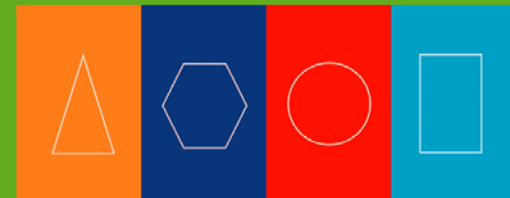
Enterprise size	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Under 10	38.9%	17.5%	38.8%	52.4%	36.3%	38.4%	33.6%	37.3%	28.0%
10 - 19	13.9%	6.9%	12.4%	6.1%	11.7%	11.7%	11.6%	11.0%	9.9%
20 - 49	15.3%	9.9%	13.6%	17.5%	14.0%	14.9%	12.3%	14.3%	12.0%
50 - 249	21.0%	18.8%	16.9%	21.0%	18.5%	17.7%	20.4%	23.4%	19.1%
SME (< 250) share	89.1%	53.1%	81.6%	97.0%	80.5%	82.7%	77.8%	86.5%	68.9%
250 and over	10.9%	46.9%	18.4%	3.0%	19.5%	17.3%	22.2%	13.5%	31.1%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: CSO, Business Demography

\* Due to small numbers of enterprises of certain categories in some counties, in order to protect the confidentiality of individual enterprises, these have been suppressed by the CSO; subsequently, although the differences are minor and only a few regions are affected, the regional totals were adjusted accordingly and the percentages shown in the table are based on reduced regional totals.

Small and medium sized enterprises accounted for over two thirds (69%) of total persons engaged at the State level. Dublin had the biggest share of persons engaged in large (250 and above) enterprises, accounting for almost a half of all persons engaged in the business economy in the region. (Table 4b)

Table 5 shows the data on companies employing 50 persons or more by region and sector for 2015. At the level of the State, 18% of medium to large enterprises were in industry, 17% were in wholesale & retail, and 11% were in accommodation & food services. Consistent with the size of its economy, Dublin had the highest number of medium to large enterprises in each sector. Dublin accounted for 82% of medium to large companies operating in the financial sector (comprising financial, insurance and real estate activities), and for 71% of companies operating in the information & communication sector. It also accounted for about three fifths of medium to large enterprises operating in professional services, for two fifths of those in wholesale & retail, and one third of all medium to large enterprises operating in construction. The South-West region accounted for almost a fifth of medium to large enterprises operating in accommodation & food services in the State and for about one-in-ten of medium to large companies



operating in the information & communication sector. It also accounted for 15% of relatively large companies operating in industry and for the same share in professional services. In the Midland and Border regions, industry accounted for the largest share of medium and large enterprises, with almost a third of large employers operating in this sector. (Table 5)

Table 5. Number\* of medium to large companies (employing 50 persons or over) by sector and region, 2015

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Industry	90	140	70	50	70	70	100	70	650
Construction	10	30	10	-	10	10	10	10	100
Wholesale & retail	40	250	50	30	40	50	100	50	600
Transportation	10	70	10	-	10	10	10	-	120
Accommodation & food	40	130	30	10	30	50	70	40	390
Information & communication	-	120	-	-	10	10	20	10	170
Financial, insurance, etc.	-	140	-	-	-	-	10	10	160
Professional activities	10	140	10	10	20	10	40	20	240
Admin. & support	10	90	10	-	10	10	20	10	160
Public admin. & defence	10	60	10	10	10	10	10	10	140
Education	40	130	40	20	30	40	50	20	360
Health & social work	40	120	30	20	30	30	40	30	340
Other NACE activities	10	70	10	-	10	-	10	10	110
<b>Total</b>	<b>300</b>	<b>1,480</b>	<b>270</b>	<b>150</b>	<b>270</b>	<b>310</b>	<b>490</b>	<b>280</b>	<b>3,540</b>

Source: SOLAS (SLMRU) analysis of Data Ireland (Kompass) data

\* All numbers have been rounded to the nearest 10. The cells with fewer than 5 companies are not depicted for confidentiality reasons. Agriculture is excluded.

## Labour market indicators

Table 6 presents the selected labour market and demographic statistics by region for the fourth quarter of 2015. Regarding demographics, Dublin had the largest population of over 1.3 million persons and it accounted for 28% of the total national population. The South-West region, with approximately 671,000 inhabitants accounted for 14% and was the second largest in this regard. At the same time, the Midland and Mid-West regions were smallest, and accounted for 6% and 8% respectively.

Consistent with the above, Dublin had the largest labour force of approximately 660,400 persons, accounting for 30% of total labour force in the State, compared to 135,000 in the Midland, 167,000 in the Mid-West, and 200,000 in the West regions, accounting for 6%, 8%, and 9% of the total respectively.

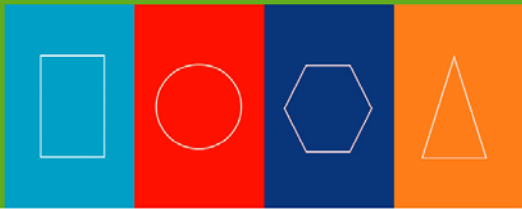


Table 6. Demographic and labour market statistics by region, Q4 2015

Region	POP 000s	POP/km2	POP (15-64) 000s	LF 000s	E 000s	UE 000s	E rate (20-64 years)	UE rate (15-75 years)	P rate
Border	494.5	41	304.2	213.6	195.0	18.6	67.8%	8.7%	56.5%
Dublin	1,319.5	1,466	883.8	660.4	610.4	50	72.2%	7.6%	63.2%
Mid-East	552.6	91	354.3	255.1	235.8	19.3	71.2%	7.6%	61.5%
Midland	293.6	45	187.9	135.4	120.8	14.7	68.2%	10.9%	60.3%
Mid-West	376.4	46	238.5	167.1	153.1	14.1	67.8%	8.5%	57.1%
South-East	510.4	54	325.7	233.1	205.4	27.7	66.7%	11.9%	58.6%
South-West	670.7	55	433.4	306.3	283.9	22.4	68.8%	7.4%	58.1%
West	433.9	32	273.9	199.5	178.6	20.8	67.9%	10.6%	58.8%
Ireland	4,653.6	67	3,001.8	2,170.5	1,983.0	187.5	69.6%	8.7%	60.0%

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

The labour force participation rate<sup>9</sup> varied noticeably between the regions - the Border region had the lowest (56.5%), while Dublin had the highest (63.2%), followed by the Mid-East region, which had the second highest participation rate (61.5%). With the exception of the Midland region, for all other regions the participation rate was below the average rate for the State, which was 60%.

With approximately 610,500 persons in employment, Dublin accounted for almost a third of employment in the State, while the Midland region, with just below 121,000 persons in employment, accounted for 6%. Dublin had the highest employment rate (72%), followed by the Mid-East region (71%); conversely, the South-East region had the lowest (67%); apart from Dublin and the Mid-East, all other regions (although the South-West only marginally) had a rate of employment below the average rate for the State and below the national target of at least 69%.<sup>10</sup>

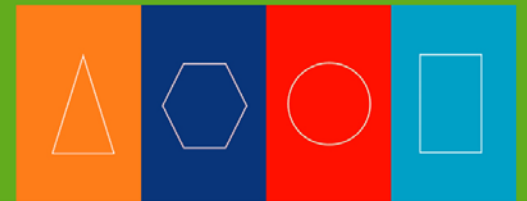
With regard to changes year-on-year, employment expanded in the Midland, Border, Dublin, and South-West regions, by 6%, 5%, 4%, and 3% respectively (at a faster rate than the average for the State), translating into an additional 7,000, 9,000, 23,000, and 8,000 persons at work in the fourth quarter of 2015. Employment remained static in the Mid-West and South-East regions, while it contracted in the West and Mid-East regions.

Over the five-year period quarter 4 2010 to quarter 4 2015, employment expanded relatively strongly in the Midland, South-East and Dublin regions, by 17%, 11%, and 10% respectively, translating into 17,500, 19,500 and almost 60,000 additional persons in employment respectively. All other regions had an increase in employment that was below that of the State (which was 7%), while the West region reported a contraction in employment over the period. Considering the annualised rate of growth, employment grew at a rate of 3.2% per annum in the Midland, and by 2% p.a. in the South-East and Dublin regions over the five year

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

<sup>10</sup> While the Europe 2020 strategy target is to reach a total employment rate for people aged 20 to 64 of at least 75% in the EU by 2020, the relevant national target in Ireland is 69-71% (*Enterprise 2025*, (2015) Department of Jobs, Enterprise and Innovation; *Ireland's National Skills Strategy 2025* (2016) Department of Education and Skills).





period, from quarter 4 2010 to quarter 4 2015. The above improvements notwithstanding, no region reverted to the levels of employment observed in 2007.

Over the one-year period quarter 4 2014 to quarter 4 2015 most regions reduced the number of unemployed, with the exception of the South-East and West regions where it remained static. The reduction in unemployment was particularly discernible in the South-West region, where it was reduced by almost a third; consequently there were approximately 10,000 fewer persons seeking work in the region in quarter 4 2015 when compared with the situation a year previously. Consistent with this, the South-West region had the lowest rate of unemployment in the State of 7.4%; the Mid-East and Dublin regions had the second lowest rate, of 7.6% each. In contrast, the South-East region had the highest rate of unemployment (11.9%). Over the five-year period Q4 2010 - Q4 2015, all regions reported a reduction in the number of persons unemployed, with this reduction ranging from 28% in the Midland region to 55% in the Mid-West region. Consequently, the rate of unemployment declined in all regions over the period; the decline was most pronounced in the Mid-West region, where the rate of unemployment was effectively halved, declining by 8.5 percentage points.

The picture regarding the regional labour force was more varied: over the five-year period quarter 4 2010 to quarter 4 2015, it expanded in the Midland region (by 9%), Dublin (by 4%), and the South-East region (by 3%), while it declined in all other regions, with this contraction being particularly pronounced in the Mid-West and West regions, with 15,000 fewer persons partaking in the labour force in each. Consequently, overall, at the State level, there was only a marginal increase in the size of labour force over the period. Consistent with the above, the rate of participation increased in the Midland, Border, and Dublin regions, it remained unchanged in the South-East, while it declined in the Mid-West, West, Mid-East, and South-West regions. Subsequently, at 60% in quarter 4 2015, the participation rate was effectively unchanged for the State, only marginally declining from 60.2% observed in quarter 4 2010.

## Employment by sector

Table 7 presents the sectoral distribution of employment for each region in quarter 4 2015. Approximately one quarter of those at work in each region were employed in the public sector (understood in a broad sense, to include public administration & defence, education, and health). The share of employment in the public sector was the highest in the West region, at 27%, followed by the Border region, where it comprised 26.5% of employment; it was the lowest in the South-West region, where it comprised 24.5% of employment. Apart from the South-West, Dublin was the only other region where the share of employment in the public sector was below the national average. Wholesale & retail was the largest sector of employment in the Midland, South-East, Border, Mid-East, and Dublin regions. Industry was the largest sector in the Mid-West, West, and South-West regions. Dublin reported the smallest share of employment in industry of only 8%. In contrast, the corresponding figure in the Mid-West and West regions was 17%, and 16% in the South-West. Dublin had the highest share of its employment in knowledge intensive services (KIS - market, high tech, and financial services), which amounted to a quarter of employment in the region.<sup>11</sup>

<sup>11</sup> KIS broadly coincide with high value added sectors: ICT, professional scientific & technical, and financial activities; Knowledge-intensive market services: water & air transport, legal & accounting, management consultancy, architectural & engineering, advertising & market research, other scientific & technical activities, employment and security related activities (NACE Rev. 2 codes: 50, 51, 69 - 71, 73 - 74, 78, 80); High-tech knowledge-intensive services: information & communication excluding publishing, R&D - (NACE 59 - 63, 72); Knowledge-intensive financial services: financial, insurance and real estate activities - NACE Rev. 2 codes 64, 65, 66); (Source: Eurostat).



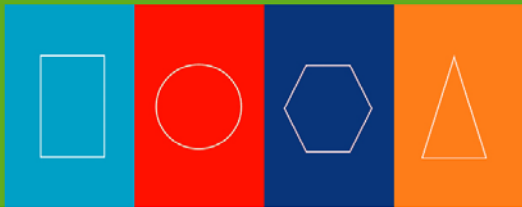


Table 7. Sectoral\* employment by region, (000s) Q4 2015

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Agriculture	20.1	2.4	9.9	9.6	10.3	17.7	20.7	15.7	106.4
Industry	25.3	47.1	30.6	18.4	25.7	27.0	44.4	29.7	248.4
Construction	13.7	27.3	17.5	7.6	10.9	16.7	18.8	14.2	126.7
Wholesale & retail	29.6	83.4	32.8	19.8	20.4	31.4	40.7	21.2	279.4
Transportation	8.4	32.9	12.9	5.1	8.6	7.8	11.3	6.7	93.8
Accommodation & food	14.8	49.8	14.7	8.6	9.7	14.5	19.8	11.2	143.1
Information & communication	3.3	47.1	9.7	**	3.5	5.0	9.2	5.4	85.4
Financial, insurance, etc.	6.7	51.6	13.3	3.9	4.7	6.2	7.7	3.9	97.8
Professional activities	7.7	47.8	16.2	5.6	7.9	9.4	15.4	9.3	119.3
Admin. & support	4.6	27.1	6.7	**	5.2	5.9	12.2	4.3	67.1
Public admin. & defence	10.3	31.3	12.0	7.2	6.4	11.4	11.7	8.8	99.1
Education	14.4	45.5	18.8	7.6	12.9	16.9	23.4	14.0	153.5
Health & social work	26.6	76.5	29.8	16.5	20.0	24.6	34.3	25.4	253.6
Other NACE activities	8.8	37.2	10.3	7.0	6.2	10.5	14.0	8.8	102.7
Total *	194.3	606.7	235.3	120.3	152.6	205.0	283.5	178.6	1,976.3

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

\* Excludes 'Not stated'; this category totalled 6,600 person for the State, bringing the total number in employment to 1,983,000; Note that not all rows/columns add to subtotals due to rounding.

\*\* Sectoral employment too small to report.

Consistent with this, Dublin had the highest share of employment in the information and communication sector (accounting for 8% of regional employment), in financial services (comprising 8.5%), and in professional activities (accounting for 8% of the region's total). The share of employment in knowledge intensive services was also high in the Mid-East region, where it was 17%, and apart from Dublin, the Mid-East was the only other region where the share employed in KIS exceeded the national average. In contrast, the shares of employment in knowledge intensive services were relatively low in the Border, Midland, and South-East regions, with each of these regions reporting the share below 10%. Furthermore, the information & communication sector was particularly small in the Border and Midland regions.

Accommodation and food services accounted for a sizeable share of regional employment in all regions (ranging from 6% to 8%). Dublin had the highest share of employment in accommodation & food services, of 8%, and consistent with the size of its economy, Dublin accounted for over a third of employment in this sector nationally. Agriculture accounted for 10% of employment in the Border region, the largest share in relative terms. This sector was also relatively large in the West, South-East, and Midland regions. The share of employment in construction was the lowest in Dublin (accounting for 4.5% of employment in the region), while in the South-East and West regions the sector accounted for 8%.

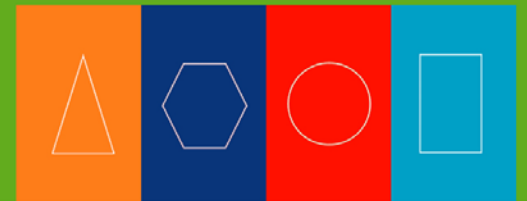


Table 8a presents employment in manufacturing by technology intensity type for quarter 4 2015.<sup>12</sup> Of the total 223,000 persons employed in manufacturing in the State, almost a fifth was in the South-West region, while Dublin accounted for an almost identical share.

Table 8a. Employment in manufacturing by technology intensity, Q4 2015

Manufacturing (segments)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	2,900	14,800	8,400	2,300	7,300	6,300	16,400	4,300	62,800
Medium-high	3,000	3,700	2,000	3,900	4,900	4,100	5,300	12,300	39,200
Medium-low	4,800	4,100	4,800	2,900	4,400	4,900	6,700	3,000	35,400
Low tech	11,700	18,700	12,000	6,400	6,700	9,500	13,100	7,600	85,600
<b>Total</b>	<b>22,300</b>	<b>41,200</b>	<b>27,200</b>	<b>15,500</b>	<b>23,200</b>	<b>24,800</b>	<b>41,500</b>	<b>27,200</b>	<b>223,000</b>

Table 8b. Employment in manufacturing by technology intensity, Q4 2015: composition within regions

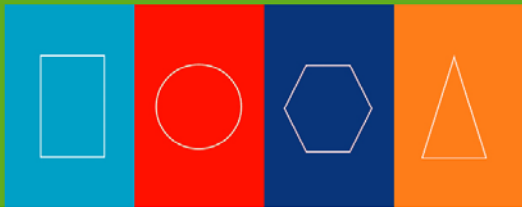
Manufacturing (segments)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	13%	36%	31%	15%	31%	25%	40%	16%	28%
Medium-high	13%	9%	7%	25%	21%	17%	13%	45%	18%
Medium-low	22%	10%	18%	19%	19%	20%	16%	11%	16%
Low tech	52%	45%	44%	41%	29%	38%	32%	28%	38%
<b>Total</b>	<b>100%</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>

Table 8c. Employment in manufacturing by technology intensity, Q 4 2015: regions' shares of the State's total

Manufacturing (segments)	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
High tech	5%	24%	13%	4%	12%	10%	26%	7%	100%
Medium-high	8%	9%	5%	10%	13%	10%	14%	31%	100%
Medium-low	14%	12%	14%	8%	12%	14%	19%	8%	100%
Low tech	14%	22%	14%	7%	8%	11%	15%	9%	100%
<b>Total</b>	<b>10%</b>	<b>18%</b>	<b>12%</b>	<b>7%</b>	<b>10%</b>	<b>11%</b>	<b>19%</b>	<b>12%</b>	<b>100%</b>

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

<sup>12</sup> High tech manufacturing: pharmaceuticals and computer, electronic and optical products; medium-high tech manufacturing: chemicals, electrical equipment, machinery and equipment, motors and other transport equipment; medium-low tech manufacturing: coke/refined petroleum, rubber/plastics, non-metallic mineral products, basic metals and fabricated metal products; low-tech manufacturing: food and beverages, tobacco, textiles, wood, paper, furniture and printing.



The share of high-tech manufacturing employment ranged from 13% in the Border region to 40% in the South-West region. Thus apart from being the largest manufacturing region, the South-West region also had the largest share of persons engaged in the high tech segment of manufacturing.

Conversely, the share of high tech manufacturing was relatively low in the Border, Midland and West regions. Furthermore, the Border region had the highest share of low tech manufacturing, at 52%, yielding the picture of manufacturing sector in this region apparently dominated by relatively low tech activities. The Mid-East, Dublin, and Midland regions also had a share of low tech employment that was above the average for the State. At 45%, the West region had the highest share of medium-high manufacturing activities. (Table 8b; Table 8c)

### Employment by occupation

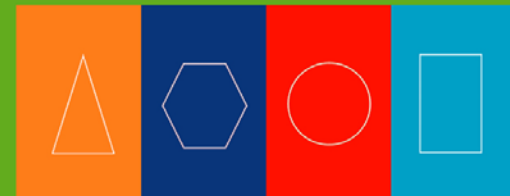
Table 9 shows regional employment by broad occupation. There were approximately 1.97 million persons in employment (with known occupation) in the State in quarter 4 2015. At approximately 360,000 persons and accounting for 18% of total employment, professionals were the largest occupation. Professionals comprised over a fifth (22%) of employment in Dublin, which was the highest share of all regions. The corresponding figure for the Mid-East was 20%, while all other regions had a share that was lower than the average for the State (of 18%). The Mid-East and Dublin regions also had the highest share of employment in associate professional occupations (14% each) and in managerial occupations (10% each). Consequently, Dublin, together with the Mid-East region, had the highest share of its employment in relatively more skilled occupations, with the combined share of professionals and associate professionals exceeding one third of employment. Dublin also had the lowest share of persons employed as operatives (only 5%). However, the share of elementary occupations in Dublin (at 12%) was above the national average and the second highest, after the South-East region.

Table 9. Regional employment by occupational group (000s), Q4 2015

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	11.5	59.5	24.5	7.6	12.7	16.6	22.4	10.2	165.1
Professionals	28.1	134.3	45.9	16.9	26.5	30.0	48.2	29.7	359.6
Associate professionals	17.7	87.2	33.7	12.4	17.2	20.7	29.1	19.1	237.3
Admin/Secretarial	20.5	72.8	23.3	10.3	15.4	19.1	28.4	16.8	206.6
Skilled Trades	39.4	51.4	35.2	22.9	30.8	39.4	54.8	38.7	312.6
Caring, Leisure, Other	18.5	44.1	18.3	13.7	12.4	14.8	23.2	16.7	161.8
Sales/Customer Service	16.9	48.9	17.7	11.1	11.4	18.3	25.6	10.7	160.6
Operatives	15.9	32.5	14.6	12.0	13.4	19.0	21.8	19.6	149.0
Elementary	24.5	70.8	20.8	12.9	12.3	26.7	29.2	16.7	213.9
Total *	193.0	601.5	234.1	119.9	152.3	204.7	282.8	178.2	1,966.5

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

\* The 'not stated/other' category was excluded from this analysis (this category totalled approximately 16,500 for the State).



There was less variability between the regions in relation to other occupations, apart from Dublin having the lowest share of skilled trades, this still being the case even after removing the effect of this region having very few farmers. The share of employment in sales & customer service roles was similar in all regions, with the exception of the West region, where it was somewhat below the State average for this occupational grouping. Equally, the share of administrative occupations was very similar in all regions.

In terms of year-on-year changes in occupational profiles, the Mid-East, Dublin, South-West, and to a lesser extent Border, reported increases for professional occupations. The Mid-East and Dublin also reported increases for managerial occupations. The increases for sales and related occupations were observed in the Border and Midland regions. At the same time, while most regions reported a reduction in elementary occupations, there was an apparent increase in Dublin for this occupational grouping. (Table 9)

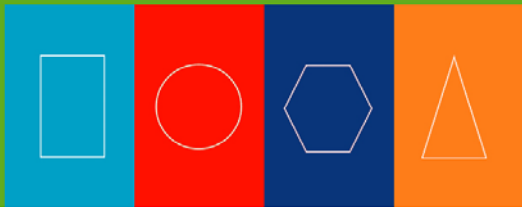
### Inter-regional employment and commuting

The employment data presented in this report is based on a person's place of residence, i.e. where a person resides, rather than a person's place of work. For some regions, where a person lives and where they work differs noticeably. This is most evident in the Mid-East region where only just above a half of workers who resided in the region were also working there, while 40% were commuting to other regions, the overwhelming majority of them to Dublin. Commuting was also relatively widespread in the Midland region, with almost a quarter of workers travelling to work to other regions, in the main to Dublin, but also to the South-East and Mid-East regions. In contrast, those residing in the South-West region and in Dublin were least likely to commute to other regions. (Table 10)

Table 10. Region of employment by region of residence, Q4 2015

Region: Residence /Employment	Border	Dublin	Mid - East	Midland	Mid-West	South-East	South-West	West	Total
Employed in same region	81.7%	93.8%	53.5%	71.0%	87.6%	81.9%	93.9%	85.2%	84.0%
Employed elsewhere	9.4%	3.5%	40.1%	24.4%	5.8%	9.9%	2.3%	9.2%	10.9%
No Answer	8.9%	2.7%	6.4%	4.6%	6.6%	8.3%	3.8%	5.7%	5.2%
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%

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



## Labour market demand and job opportunities

### Vacancies (PES)

For the year 2015, there were 94,800 vacancies advertised on the DSP Jobs Ireland internet portal (Table 11).<sup>13</sup> Of these, the highest numbers nationally were for elementary occupations (22%), followed by caring, leisure & personal services occupations (19%), and skilled trades (15%). This could be due to an occupational bias in advertising, as many employers advertise vacancies for higher skilled occupations through channels other than DSP Jobs Ireland.<sup>14</sup>

The distribution of vacancies by occupational groupings did not vary considerably across regions, with three broad occupational groupings - elementary, caring, leisure & personal services, and skilled trades occupations - accounting for the majority of vacancies. Indeed, these three occupational groupings were the top three in six out of eight regions - the exception being the Midland and the South-East regions, with the vacancies for caring & leisure occupations in each region being outstripped by those for operatives and by those for administrative roles, respectively.

Table 11. Number of PES vacancies by occupational group and region, 2015

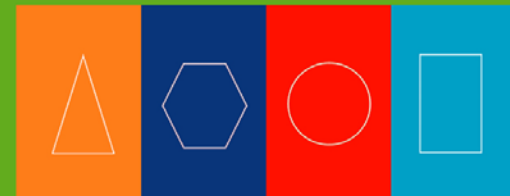
Occupation/ Region	Border	Dublin	Mid- East	Midland	Mid- West	South- East	South- West	West	Total
Managers	131	648	99	49	77	137	260	124	1525
Professionals	342	2,998	435	220	527	307	715	612	6,156
Associate professionals	883	3,369	968	476	718	662	1091	923	9,090
Admin/Secretarial	1,044	3,388	751	622	728	982	1218	846	9,579
Skilled Trades	1,354	4,580	1,671	890	914	1,124	2,239	1,209	13,981
Caring/Leisure	1,332	8,501	2,871	559	1,023	745	1,438	1,194	17,663
Sales & Customer Service	966	2,068	584	463	463	695	1,089	511	6,839
Operatives	1,111	3,370	1,491	664	464	766	1,102	549	9,517
Elementary Occupations	1,404	8,585	2,185	1,106	1,431	1,244	3,173	1,335	20,463
<b>Total</b>	<b>8,567</b>	<b>37,507</b>	<b>11,055</b>	<b>5,049</b>	<b>6,345</b>	<b>6,662</b>	<b>12,325</b>	<b>7,303</b>	<b>94,813</b>

Source: DSP Jobs Ireland database

The share of elementary occupations ranged from 16% in the Border to 26% in the South-West region; the share of caring/personal services vacancies ranged from 11% in the Midland and South-East regions to 26% in the Mid-East region; the share of vacancies for skilled trades ranged from 12% in Dublin to 18% in the Midland and South-West regions. The share of vacancies for operatives ranged from 7% in the Mid-West to 13% in the Border, Mid-East, and Midland regions. At the same time, the share of vacancies for

<sup>13</sup> These refer to all vacancies advertised by employers through the National Contact Centre in the Department of Social Protection (DSP Jobs Ireland). The vacancy data presented in this report is equivalent to PES - public employment service -vacancies; while it excludes vacancies advertised as part of Work Placement and JobBridge schemes, it does not exclude vacancies advertised by recruitment agencies (e.g. for nursing posts).

<sup>14</sup> The distributions of vacancies advertised through DSP Jobs Ireland are generally skewed towards skilled trades, caring/leisure services and elementary occupations. On the other hand, vacancies advertised through IrishJobs.ie (a private online advertising service) are skewed towards managerial, professional and associate professional occupations.



professionals ranged from 4% in the Mid-East, Border and Midland regions to 8% in the West, Dublin and Mid-West regions.

There was less variation between the regions regarding the share of associate professionals, accounting for about one-in-ten of all vacancies in all regions, the exception being the West region, where they accounted for one-in-eight. Dublin accounted for two-in-five of all vacancies, followed by the South-West and Mid-East regions, accounting for about one-in-eight. Dublin accounted for a half of all vacancies for professionals and for caring, leisure and other services. (Table 11)

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

Table 12 presents the data on new employment permits issued to non-EEA workers in 2015. It illustrates that some vacancies continue to prove difficult to fill from the domestic supply and from within the EEA labour supply.<sup>15</sup> There were approximately 6,100 new employment permits issued to non-EEA citizens overall, amounting to a 25% increase in relation to 2014.

While new employment permits were issued for all regions, the majority (three-in-five) were issued for the posts in Dublin; 10% were issued for the posts in the South-West region. Three quarters were issued for professional occupations (mostly in the information & communication and health sector), with this occupational grouping accounting for the entire annual increase in new employment permits granted.

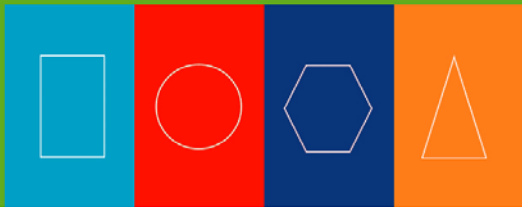
Table 12. Number of new employment permits by occupation and region, 2015

Occupation	Border	Dublin	Mid-East	Midland	Mid-West*	South-East	South-West	West	Total
Managers	5	193	5	1	25	2	23	4	258
Professionals	333	2,501	230	206	278	218	478	310	4,554
Associate professionals	26	595	120	1	14	7	53	11	827
Admin & Secretarial	1	55	-	-	3	-	4	-	63
Skilled Trades	4	89	69	7	19	13	21	6	228
Caring/Leisure services	7	27	16	1	6	7	10	8	82
Sales/Customer service	5	28	1	-	1	1	1	1	38
Operatives	-	3	3	1	-	-	2	2	11
Elementary	1	8		1	1	1	1	3	16
<b>Total</b>	<b>382</b>	<b>3,499</b>	<b>444</b>	<b>218</b>	<b>347</b>	<b>249</b>	<b>593</b>	<b>345</b>	<b>6,077</b>

Source: DJEI

\*Tipperary is classified into the Mid-West region.

<sup>15</sup> When interpreting employment permit data, it should be noted that the number of employment permits issued for most occupations may represent an over-estimation of the true annual inflow of non-EEA workers into the Irish labour market because not all new employment permits are issued to first time applicants; for instance, when an employment permit holder is made redundant, or moves to a new employer, a new permit is issued rather than the old permit being renewed.



## Job announcements

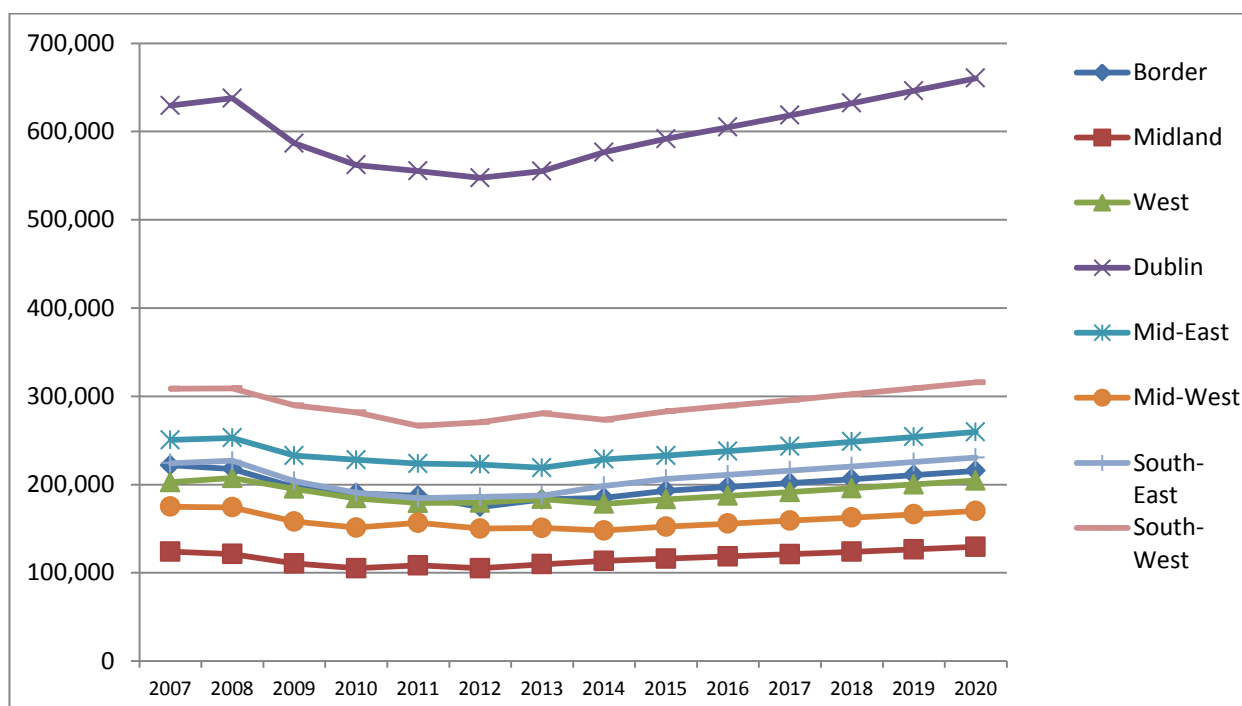
Job announcements offer an indication of the regional labour market demand. The job announcements regarding the planned and upcoming job creation that are made in the media by relevant companies are characterised by a certain lead-time, meaning that it may take a number of years for all the jobs to materialise and that a medium term perspective is also needed.

It is estimated that in 2015, the number of jobs expected to be created exceeded the number of jobs lost or expected to be lost in the short term. Furthermore, this trend continued during the first two quarters of 2016. Analysis of job announcements shows that job creation continued to occur across all regions, with a number of job creation announcements across all regions, as depicted in subsequent chapters.<sup>16</sup>

## Employment projections and outlook

Figure 3 depicts the employment projections for regions to 2020.<sup>17</sup> Over the period 2012-2020, assuming no impediments to the on-going recovery, employment was projected to increase by 2% per annum.

Figure 3. Regional employment to 2020 - projected growth path

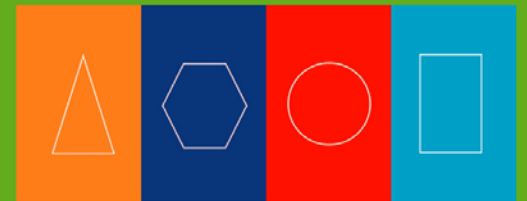


Source: SLMRU, Occupational Employment Projections 2020

The employment projections presented here imply, at the level of the State, a change in the occupational distribution of employment, with an increase in the employment share for skilled trade, managerial, sales & customer services, and operative occupations, with no change in the shares for professionals and associate professionals, and with a decline in the shares for administrative, elementary and service occupations.

<sup>16</sup> The focus is on the job announcements made in the second half of 2015, and the first half of 2016.

<sup>17</sup> Based on the 'recovery' scenario, derived from Behan, J., *Occupational Employment Projections 2020*, SOLAS: Dublin, January 2014.



With regard to sectoral employment, the above average growth rate was projected for construction (albeit from a very low base), information & communication, professional activities, financial services, and transport.

Finally, although the overall employment for the State was projected to fully recover by the end of the projection period, the regional projections suggest that not all regions would necessarily see employment fully recovering and surpassing the levels observed prior to the 2008-2011 recession.

Over the one-year period quarter 4 2014 to quarter 4 2015, it is estimated that there were approximately 44,000 net jobs added to the employment stock in the State (Table 15). While this aspect of labour market demand, referred to as expansion demand, is sizeable, having increased in relation to the one-year period quarter 4 2013 to quarter 4 2014, it is nevertheless only one source of job opportunities. Indeed, in addition to expansion demand, which is readily associated with the increase in net jobs added, job opportunities arise even in the absence of expansion demand, due to replacement demand, in itself a sizeable component of labour market demand. Replacement demand is essentially labour market demand arising from retirements and other exits from employment. It has been estimated using the outcome of the analysis of labour market transitions, undertaken at the State level.<sup>18</sup> The importance of replacement demand regarding job opportunities is reinforced further given that over the one-year period quarter 4 2014 to quarter 4 2015 employment in some regions remained static or even contracted, albeit modestly, indicating the absence of expansion demand in the short term.

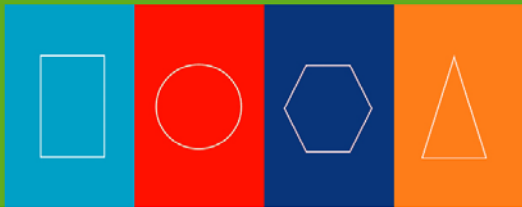
The analysis of 2015 labour market transitions showed that, to begin with, the number of transitions into employment, either from unemployment or from economic inactivity, exceeded transitions out of employment. When compared with the year previously, there was a decrease in the share of persons remaining unemployed; there was an increase in the share of flows from unemployment to employment, and from economic inactivity into employment. More precisely, there were almost 40,000 more transitions from unemployment into employment than the other way around, while there were approximately 20,000 more transitions from inactivity into employment than in the opposite direction.<sup>19</sup> This is consistent with the assertion that the employment growth accelerated over the one-year period quarter 4 2014 to quarter 4 2015. In addition, job opportunities for individuals may arise due to both inter-occupational (i.e. a person remaining in employment but changing an occupation) and intra-occupational (a person remaining in employment and in the same occupation but changing an employer) movements, each accounting for a sizeable share of labour market transitions.<sup>20</sup> In this regard, for some occupations, the inclusion of net losses from inter-occupational transitions increased the replacement demand (given that transitions out of an occupation were greater than transitions into it), while for other occupations it decreased the replacement demand (since transitions in an occupation were greater than transitions out of it).

<sup>18</sup> Labour market transition relates to the change in the labour market status (ILO defined) of individuals over time; the labour market status is: employed, unemployed, and economically inactive.

<sup>19</sup> National Skills Bulletin 2016, SOLAS (SLMRU) for the EGFSN.

<sup>20</sup> The main assumption is that the person changing an occupation and/or an employer is being replaced. In the National Skills Bulletin 2016, replacement rates were estimated for broad occupations based on identifying the number of transitions from employment to inactivity (e.g. retirement, home duties, study, exits due to ill health, etc.) and making appropriate adjustments for net losses arising from inter-occupational movements. An added assumption for undertaking regional analyses is that replacement rates and the nature of intra / inter occupational movements is consistent across all regions.





The total recruitment requirement is arrived at by combining the above two components of labour market demand (expansion and replacement) and these are depicted within each regional profile chapter (by economic sectors, including broad manufacturing subsectors), while the estimated annual replacement demand, by occupation, is depicted in the subsequent subsection (Table 13).

### Job opportunities by occupation

The transition analysis highlighted that, at an occupational level, the number of transitions from unemployment to employment during 2015 exceeded the exits to unemployment in all occupational groups, with the exception of associate professional and elementary occupations.<sup>21</sup> However, it should be noted that a sizeable amount of transition into employment were associated with persons with no previous occupation frequently transitioning into employment in elementary occupations (as well as in sales occupations), effectively boosting the rate of transition into these occupation. At the same time, while transitions from employment to inactivity exceeded transitions from inactivity into employment for all occupational groups, there were just over 90,000 transitions from inactivity to employment made by persons with no previous occupation. Subsequently, there were more transitions from inactivity to employment than the other way around. Of those, transitions into elementary and sales occupations were again sizeable.

Table 13. Estimated\* annual replacement demand by occupational group and region, based on Q4 2015

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	***	2,500	1,000	***	***	***	***	***	6,900
Professionals	1,900	9,100	3,100	1,100	1,800	2,000	3,300	2,000	24,500
Associate professionals	***	***	***	***	***	***	***	***	-2,100
Admin & Secretarial	***	3,300	1,100	***	***	***	1,300	***	9,500
Skilled Trades	2,200	2,900	2,000	1,300	1,800	2,200	3,100	2,200	17,800
Caring/Leisure	1,500	3,500	1,500	1,100	1,000	1,200	1,900	1,300	12,900
Sales/Customer Service	2,300	6,600	2,400	1,500	1,500	2,500	3,400	1,400	21,500
Operatives	1,000	2,000	***	***	***	1,200	1,300	1,200	9,100
Elementary	3,500	10,000	2,900	1,800	1,700	3,800	4,100	2,400	30,200
Total**	13,600	39,200	14,600	8,300	9,700	14,200	19,100	11,600	130,300

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

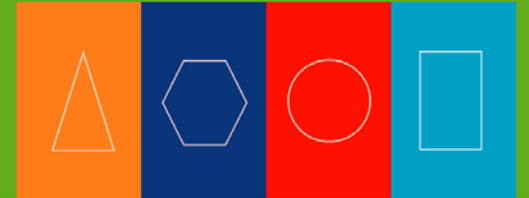
\* Note: Replacement rates ranged from -0.9% for associate professionals to 14.1 % for elementary occupations; the average replacement rate was estimated to be 6.6%. Estimates are based on Q4 2015 employment levels for nine occupational groups and excluding the 'not stated' category; therefore, the figures provided in the Table13 may differ somewhat from the figures provided in individual chapters, where projections are provided for economic sectors, bases on annual average employment figures.

\*\* Horizontal (i.e. regional) and vertical (i.e. occupational) sub-totals do not add up to the precisely same figure due to rounding.

\*\*\* Denotes cells where projected figures are below 1,000.

While the transition analysis underpinning the replacement demand estimates was conducted at the State level, these patterns in exits from employment by occupation are a useful reference point for investigating replacement demand at regional level.

<sup>21</sup> The negative replacement rate for associate professionals and slightly above average rate for professionals are likely to be a result of the issues regarding classification.



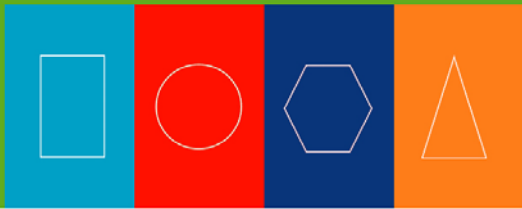
The analysis highlighted the above average replacement rates for elementary, sales & customer service, and leisure/personal services occupations, while at the same time, below average replacement rates were observed for managers and skilled trades. The highest replacement rates were observed for clerks (general, receptionists, financial), sales related roles (sales assistants, sales executives), leisure & personal services (carers, child-minders, hairdressers), the accommodation & food sector workers (chefs, waiters, bar staff and catering assistants), operatives (machine, food and construction operatives), and general labourers (agricultural, construction, cleaning). Thus based on the employment levels in quarter 4 2015 and the appropriate replacement rates derived from the transition analysis over the year 2015, an estimate of replacement demand for each region by occupational grouping is arrived at. While a large volume of inter-occupational transitions was observed for professionals (significant net loss) and associate professionals (significant net gain), it is possible that some of the observed movements may be due to a difference in role classifications between quarters. A significant share (over 50%) of these transitions is associated with classification issues, namely a move from IT/business analysts roles to business associate professional roles, as well as from architect/quantity surveyor to estimator/valuer roles. (Table 13)

Table 14 presents a list of occupations with higher than average medium term employment growth prospects, that is to say, the occupations that are expected to expand faster than the average rate for all occupations. The expansion paths are based on the medium term employment growth projections associated with, and arising out of the 'recovery' scenario, the closest to the economic situation as it unfolded since the beginning of 2013 to date and therefore the most appropriate.<sup>22</sup>

Table 14. Selected occupations with positive medium term labour market outlook (State)

Occupation	Number Employed (2015)*	% 3rd Level Graduates
Functional managers & directors	47,100	63%
Production managers in industry	13,100	67%
Advertising, marketing & sales directors	5,300	82%
Human resource managers	5,600	89%
ICT specialist & project managers	13,600	89%
Financial institution managers & directors	6,300	78%
Managers & directors in transport & logistics	6,900	43%
Managers & directors in retail & wholesale	19,500	38%
Restaurant managers	6,900	49%
Managers & proprietors in other services	27,000	46%
Electrical & electronic engineers	3,500	95%
Production, process, design & development engineers	4,900	97%
Quality control engineers, other regulatory professionals	5,100	85%
IT Business analysts & systems designers	3,000	100%
Programmers & software developers	18,900	94%
ICT professionals n.e.c. ( incl. web designers)	8,000	90%
Pharmacists	3,600	95%
Legal professionals	10,700	100%
Accountants & tax experts	37,900	97%
Mgt. consultants, business analysts & project managers	9,600	93%

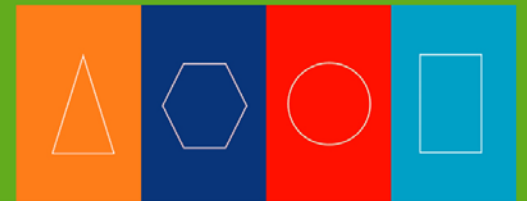
<sup>22</sup> Occupational Employment Projections 2020, SOLAS, February 2014.



Occupation	Number Employed (2015)*	% 3rd Level Graduates
Actuaries, economists & statisticians	7,400	91%
Architectural technologists, construction mgt. & surveyors	3,300	67%
Media professionals	6,000	95%
Electrical, electronic & engineering technicians	5,800	61%
Process & quality assurance technicians	6,700	77%
Other technicians n.e.c.	5,500	75%
IT operations technicians	10,200	71%
IT user support technicians	5,000	70%
Artistic, literary & media occupations	15,900	73%
Sports & fitness occupations	8,100	60%
Aircraft pilots, ship officers, air traffic controllers	2,600	89%
Brokers & insurance underwriters	4,300	84%
Finance & investment analysts	9,400	90%
Financial & accounting technicians	3,500	79%
Financial accounts managers	8,800	77%
Other business associate professionals	11,900	85%
Byers & procurement officers	3,700	58%
Business sales executives	21,800	46%
Marketing associate professionals	5,300	82%
Sales accounts & business development managers	18,500	69%
Regulations inspectors; health & safety officers	4,000	79%
Financial administrative occupations	53,100	55%
Stock control, transport & distribution admin.	5,400	39%
Office managers & supervisors admin. Occupations	9,600	57%
Metal forming, welding & related trades	10,500	13%
Metal machining, fitting & instrument making trades	28,400	36%
Electrical & electronic trades, etc.	34,300	38%
Plumbers	9,400	11%
Butchers, fishmongers, etc.	7,800	7%
Sales assistants	124,900	22%
Sales related occupations	11,500	47%
Sales supervisors	5,000	54%
Customer service occupations	21,500	54%
Food, drink & tobacco process operatives	13,300	18%
Chemical & related process operatives	5,700	33%
Other process operatives	4,200	20%
Routine operatives	20,000	28%
Assemblers	7,100	28%
Road transport operatives/drivers	61,400	11%

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

\* Employment figures depicted are annual average figures for the State for 2015 (i.e. the average of the four quarters in 2015).



The numbers employed in 2015 for each occupation are shown in order to provide the context for the relative magnitude of job opportunities which may arise from recruitment requirement, comprising both replacement and expansion demand. A broad indication of unemployment (i.e. whether the rate of unemployment for an occupation is below the national average) where numbers were sufficiently large is also utilised for selecting the relevant occupations.<sup>23</sup> The share of third level graduates employed in these occupations at present (i.e. quarter four 2015) is also depicted since it can serve as a guideline for the level of education and training required for entering these occupations. (Table 14)

### Employment change over time by economic sector

In this section, employment changes by sector over the medium to long term (five-year) period, from quarter 4 2010 to quarter 4 2015, and the most recent year-on-year employment changes between quarter 4 2014 and quarter 4 2015 are examined. Employment changes and trends by sector are informative since they provide an indication of the changes in the regional business landscape. Furthermore, they may provide some indication regarding the expected employment changes in the future. This theme is developed further by considering employment outlook by sector, taking into account replacement demand, as well as projected expansion demand, and short-term projections are depicted in subsequent chapters.

### Employment change 2010-2015

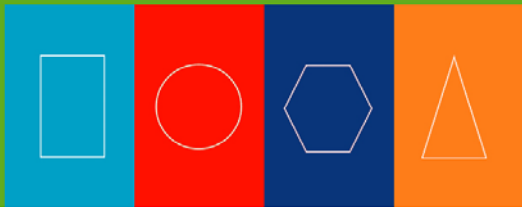
While over the five-year period quarter 4 2010 to quarter 4 2015, employment in Ireland increased by almost 126,000 (or 7%), there were discernible regional variations in this regard. Employment actually declined in the West region and grew only modestly in the Mid-West. At the same time, the Midland, South-East and Dublin regions reported the increases above the State average, resulting in net increases in employment by 17,500, 19,500 and almost 58,000 persons respectively.

With regard to sectoral employment, at the State level, public administration & defence and transport contracted, financial services and education remained static, while all other sectors expanded. The largest increases, in relative terms occurred in information & communication, accommodation & food, construction, professional activities and agriculture.<sup>24</sup>

With regard to the regional picture, the information & communication sector expanded particularly strongly in Dublin and this region effectively accounted for the total increase in employment in the sector. Accommodation & food services also grew strongly in Dublin, while increases in employment were also reported in the Mid-East, Midland, and South-East regions; the sector remained static in the Border region and actually declined in other regions, most notably in the West. Construction expanded in most regions, most notably in the Dublin, Mid-East, and South-East regions; the sector however, remained static in the Midland and South-West regions over the period.

<sup>23</sup> Numbers in employment and unemployment, and subsequently, unemployment rates, associated with occupations where employment is comparatively small are less reliable due to a greater risk of sampling error.

<sup>24</sup> Estimates of employment in the agriculture, forestry and fishing sector are sensitive to sample changes over time and growth rates in this sector should be interpreted with caution, especially at a regional level.



While industry grew overall and in most regions, it contracted notably in the Border region. Professional services expanded in most regions, with discernible increases in the South-East, South-West, Mid-East, and Dublin regions. While financial services remained static overall, the Border region reported an expansion for this sector over the period. The health sector expanded in most regions, although it remained static in the West and South-East regions. (Table 15)

Table 15. Employment change by sector and region (000s), Q4 2010 - Q4 2015

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture	4.3	*	1.6	3.6	1.6	1.6	3.5	3.8	21.0
Industry	-6.3	-1.0	1.5	3.2	2.6	*	1.8	3.1	4.1
Construction	1.9	5.8	2.8	*	1.2	2.7	*	1.3	15.6
Wholesale & retail	3.7	1.2	-1.1	4.4	-1	3.4	-1.7	-4.5	4.5
Transportation & storage	*	-6.8	*	*	*	*	*	*	-3.0
Accommodation & food	*	21.2	2.9	2	-1.7	2.1	-1	-3	23.5
Information & communication	*	14.9	1.3	*	-1.4	1.2	*	*	14.3
Financial, insurance, real estate	2.0	-1.0	1.2	*	*	1	-1.1	-1.7	*
Prof., scientific, technical	*	6.6	3.6	*	*	2.3	3.6	1.8	20.0
Administrative services	*	6.1	*	-2.5	*	*	3.7	*	6.2
Public admin. & defence	*	-2.8	-1.1	*	*	2.3	-1.1	*	-3.8
Education	*	2.7	-3.1	1.4	*	1.4	2.1	-2.7	1.3
Health & social work	1.1	2.9	3.4	2.6	1.5	*	2.5	*	14.9
Other NACE activities	*	6.2	-4.1	2.4	*	1.9	1.3	*	7.6
Total **	7.8	56.6	9.4	17.0	2.4	19.6	14.5	-2.2	125.6

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

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

\*\* Excluding those in employment where no specific NACE sector was stated.

### Employment change 2014-2015

Total employment expanded by approximately 44,000 (translating into a 2.3% increase) over the period quarter 4 2014 to quarter 4 2015. Year-on-year increases were observed in the Midland, Border, Dublin, and South-West regions at a faster rate than the average for the State, which was 2.3%. Employment remained static in the Mid-West and South-East regions, while it marginally contracted in the West and Mid-East regions (by 1% in each). The most pronounced increases, in absolute terms, were recorded in the Dublin, Border and South-West regions, with approximately 23,000, 9,000, and 8,000 additional persons in employment respectively. In relative terms, the highest increase was observed in the Midland, by 6%, followed by the Border region, where employment grew by 5%. (Table 16)

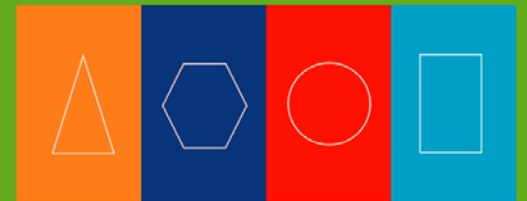


Table 16. Employment change by sector and region (000s), Q4 2014 - Q4 2015

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture	2.4	*	*	*	*	*	*	-2.2	*
Industry	-1.7	4.3	-1.7	2.0	*	-4.1	4.8	*	3.9
Construction	3.9	2.0	*	-1.9	1.3	1.4	*	3.7	9.9
Wholesale & retail	4.5	2.1	-1.2	3.5	-2.1	*	*	-4.5	2.7
Transportation & storage	*	*		*	2.6	*	*	2.3	3.6
Accommodation & food	*	6.5	*	2.9	*	*	-2.3	-1.4	5.6
Information & communication	*	2.9	*	*	-1.0	1.4	-2.2	*	1.9
Financial, insurance, etc.	1.1	-4.0	*	*	*	*	*	-1.4	-4.0
Professional, scientific, tech.	*	*	*	*	-1.1	*	1.2	1.5	2.2
Administrative activities	*	4.6	-1.3	-2.2	*	*	1.3	*	1.5
Public admin. & defence	1.6	-1.1	*	*	*	3.0	*	1.0	4.4
Education	*	*	*	*	*	*	2.2	*	*
Health and social work	*	*	2.1	1.0	*	*	*	1.5	4.8
Other NACE activities	-1.9	3.9	-2.8	2.6	-1.6	1.4	2.5	*	4.5
<b>Total**</b>	<b>8.7</b>	<b>20.5</b>	<b>-2.2</b>	<b>6.7</b>	<b>*</b>	<b>*</b>	<b>8.2</b>	<b>-1.7</b>	<b>41.0</b>

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

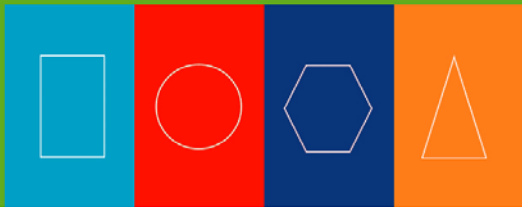
\* Estimates for number of persons in a cell are too small to be considered reliable.

\*\* Excluding those in employment where no specific NACE sector was stated (note that annual change for *all* in employment is estimated at 44,000).

Nationally, employment growth was relatively the strongest in the construction sector (which expanded by 8.5%); the sector grew strongly in the Border and West regions. There were also relatively strong increases in accommodation & food services and transportation & storage nationally (expanding by 4% each). The Dublin and Midland regions had particularly strong expansion in accommodation & food services.

Industry, professional and administrative activities, as well as the information & communication sector expanded in line with the State's average, by 2%. Industry grew particularly strongly in the South-West, followed by Dublin. Administrative and information & communication services grew relatively strongly in Dublin, with this region effectively accounting for the increases observed in these two sectors nationally. The financial, insurance and real estate sector (also referred to as 'financial services') contracted nationally, with Dublin accounting for the entire decrease in employment, with other regions reporting only marginal changes. Agriculture remained static nationally, while the picture was rather varied across regions.<sup>25</sup> (Table 16)

<sup>25</sup> As QNHS is a sample survey, it is subject to sampling error. Precision estimates are calculated for key variables. Estimates of employment in agriculture have been shown to be sensitive to sample changes over time, and employment growth rates in this sector should be interpreted with caution, especially at regional level. CSO, *Standard Report on Methods and Quality for QNHS* (various publications/versions).

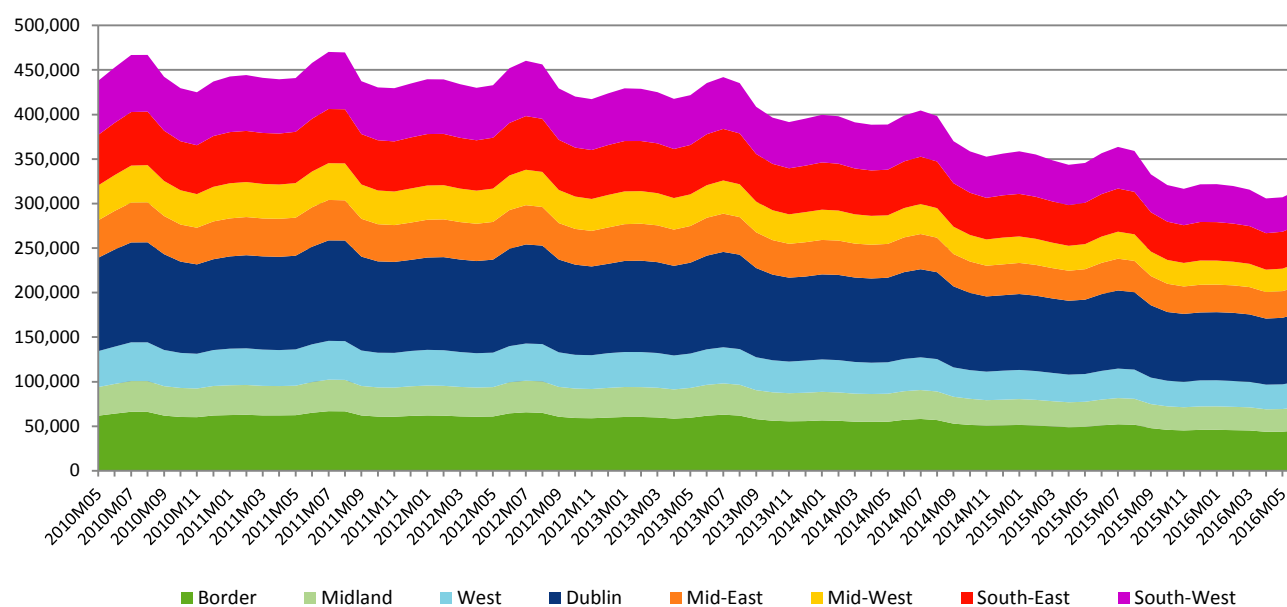


## Live Register

The Live Register is used as a short term indicator of labour market activity and it is an important source of statistic at a regional level since it outlines indicative movements of labour supply.<sup>26</sup> Live Register statistics are counts of the number of persons - under 65 years of age claiming Jobseekers Benefit, Jobseekers Allowance and other registrants (e.g. social welfare credits) - signing on the Live Register each month. However, the Live Register is not an official measure of unemployment, as it also includes part-time, seasonal and casual workers. Therefore, the Quarterly National Household Survey (QNHS) provides benchmark estimates of unemployment on a quarterly basis.

In May 2016, there were approximately 307,100 persons on the Live Register.<sup>27</sup> This figure was considerably lower than a year previously, by 11%, translating into 38,600 fewer persons signing on. The rate of decline overall was very similar to that observed over the period May 2014 to May 2015. The numbers on the Live Register declined in all regions year-on-year; the most pronounced decline was observed in the South-West and Mid-East regions (by 13.4% and 12.5% respectively). Over the six-year period May 2010 to May 2016, the decline was most pronounced in the South-West and Mid-West regions, where the numbers signing on declined by more than a third.

Figure 4. Persons on Live Register by Region, May 2010 - May 2016



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

During the period under observation, from May 2010 to May 2016, the numbers on the Live Register peaked for most regions in July and August 2011, while the lowest point was April 2016. The decline from the peak was most pronounced in the Mid-West and South-West regions (by 40%). (Figure 4)

In May 2016, the age distributions of persons on the Live Register were broadly similar across regions. The share of persons younger than 25 years of age on the Live Register ranged between 10% (in the South-West

<sup>26</sup> Live Register information is sourced from Department of Social Protection (DSP). The initial data source is the local office where registrants sign on.

<sup>27</sup> Live Register unadjusted figures. It should be borne in mind that there is a pronounced seasonality in the numbers signing on the Live Register, with the numbers increasing during the summer months and declining in September.



region) and 14% (in the Midland region). Compared with the situation a year ago, the number of those younger than 25 declined relatively faster in all regions; the decline was the most pronounced in the South-West and Dublin regions. (Table 17a, Table 17b)

Table 17a. Number of persons on the Live Register by age group and region, May 2016

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	5,841	8,751	3,749	3,594	3,230	5,458	4,017	3,041	37,681
25 years & over	38,046	65,976	26,160	21,812	22,046	35,989	34,672	24,677	269,378
<b>Total</b>	<b>43,887</b>	<b>74,727</b>	<b>29,909</b>	<b>25,406</b>	<b>25,276</b>	<b>41,447</b>	<b>38,689</b>	<b>27,718</b>	<b>307,059</b>

Table 17b. Distribution of Live Register by age group and region (%), May 2016

Age	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Under 25 years	13%	12%	13%	14%	13%	13%	10%	11%	12%
25 years & over	87%	88%	87%	86%	87%	87%	90%	89%	88%
<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

Males accounted for almost three-in-five persons on the Live Register nationally, and the gender distributions were similar in each region. Within the regions, the highest share of males was in Dublin (61.3%) while the lowest share was in the Mid-East region (56.3%). Compared with the situation a year ago, the share of males declined in all regions. (Table 18a, Table 18b)

Table 18a. Number of persons on the Live Register by gender and region, May 2016

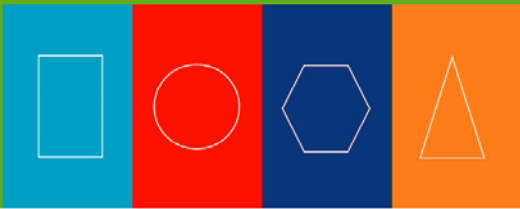
Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	25,641	45,819	16,842	14,589	14,917	24,414	23,020	16,093	181,335
Female	18,246	28,908	13,067	10,817	10,359	17,033	15,669	11,625	125,724
<b>Total</b>	<b>43,887</b>	<b>74,727</b>	<b>29,909</b>	<b>25,406</b>	<b>25,276</b>	<b>41,447</b>	<b>38,689</b>	<b>27,718</b>	<b>307,059</b>

Table 18b. Distribution of Live Register by gender and region (%), May 2016

Gender	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Male	58.4%	61.3%	56.3%	57.4%	59.0%	58.9%	59.5%	58.1%	59.1%
Female	41.6%	38.7%	43.7%	42.6%	41.0%	41.1%	40.5%	41.9%	40.9%
<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



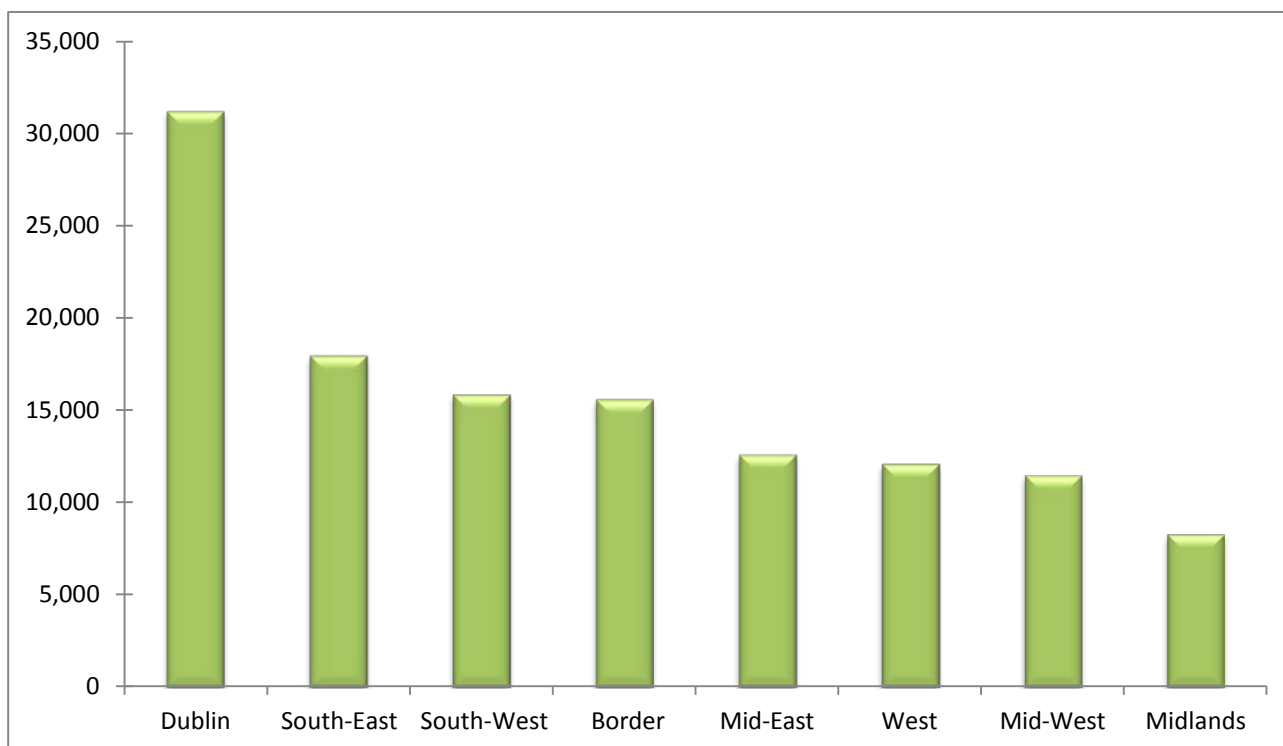


### Job ready job seekers registered with the Public Employment Service (PES)

Figure 5 presents the number of ‘job-ready’ persons registered with the Public Employment Service (PES), that is to say, who were in receipt of unemployment benefit/allowance (or credits), who were seeking employment, and who were ready to take up employment in April 2016.<sup>28</sup> In April 2016, there were just over 125,000 job seekers in the State. When compared with the situation a year previously, the number of job ready job seekers declined in each region. (Figure 5)

With regard to the occupational distribution of job ready job seekers across regions, the highest share of job seekers in each region had previously worked in elementary occupations; the share ranged from 20% in the Mid-East to 26% in the South-East region. Skilled trades were the second largest group, accounting for 16% of job ready job seekers in Dublin and for 20% in the South-West. The share of those job seekers who previously worked as operatives ranged from 13% in Dublin to 17% in the Mid-West region. (Table 19)

Figure 5. Job ready job seekers by region, April 2016



Source: Central Records System of the Department of Social Protection/DSP Client Database

Dublin had the highest share of job seekers who previously worked as professionals or associate professionals. The share of those previously working in sales & customer service occupations was quite similar across all regions with about one-in-twelve of job ready job seekers classified in these. (Table 19)

<sup>28</sup> ‘Job ready job seekers’ are persons (registered with the Public Employment Service (PES), Department of Social Protection (DSP)), seeking employment and who were previously employed in a specific occupation and are self-declared as job ready. As such, they are a subset of Live Register. Throughout the report ‘job ready job seekers’ are referred to as ‘job seekers’ and these terms are used interchangeably.

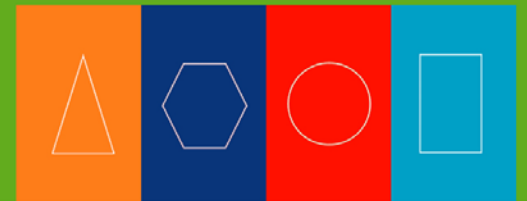


Table 19. Number of job ready job seekers by occupational group and region, April 2016

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Managers	223	822	294	118	171	250	221	185	2,284
Professionals	668	1,913	629	240	517	618	814	646	6,045
Associate professionals	1,292	3,950	1,301	572	937	1,334	1,405	1,176	11,967
Admin & Secretarial	1,551	3,826	1,668	799	1,305	1,791	1,543	1,206	13,689
Skilled Trades	2,962	4,996	2,319	1,542	2,048	3,385	3,208	2,362	22,822
Caring/Leisure	1,293	2,021	942	787	962	1,534	1,289	900	9,728
Sales/Customer Service	1,299	2,940	1,118	778	968	1,567	1,331	944	10,945
Operatives	2,476	4,200	1,828	1,372	1,907	2,846	2,322	1,800	18,751
Elementary	3,806	6,455	2,479	2,073	2,675	4,611	3,639	2,860	28,598
Other	45	107	42	33	17	44	95	40	423
<b>Total</b>	<b>15,615</b>	<b>31,230</b>	<b>12,620</b>	<b>8,314</b>	<b>11,507</b>	<b>17,980</b>	<b>15,867</b>	<b>12,119</b>	<b>125,252</b>

Source: Central Records System of the Department of Social Protection/DSP Client Database

## Unemployment

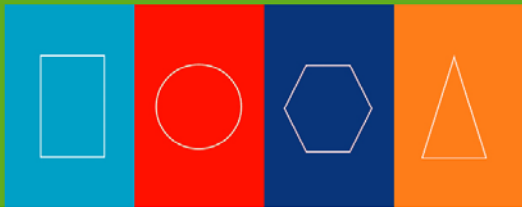
In quarter 4 2015, there were approximately 187,500 unemployed persons in the State, and the unemployment rate was 8.7%. At almost 12%, the South-East region had the highest rate of unemployment, followed by the Midland and West regions, at 10.9% and 10.6% respectively; each of these regions had a rate of unemployment that was more than one percentage point above the State average.

A sizeable number of unemployed (24%) reported having no previous employment experience, with the Midland region reporting the highest share, almost a third (Table 20; Table 21).

Table 20 presents unemployment by sector and region for quarter 4 2015.<sup>29</sup> Just above 119,000 of unemployed persons in the State have stated their previous sector of employment. Of these, almost 25,000 had previously been employed in the construction sector, translating into 21%, the highest share when compared to other sectors of previous employment. Within regions, the number (and share) of unemployed persons previously employed in construction was higher than for any other sector, with the exception of the Mid-East and Dublin regions; in the former those previously employed in industry accounted for the highest share, while in the latter those previously employed in wholesale & retail were the most numerous.

Apart from Dublin, the South-East and Midland regions also had relatively high shares of those previously employed in wholesale & retail. Those previously employed in industry were the third largest group overall, with the Mid-West and South-West regions, in addition to the Mid-East, reporting the share above

<sup>29</sup> The concept of unemployment in the report is based on the official measure of unemployment as defined by the ILO and implemented by the CSO in the QNHS. The unemployed comprise all persons aged 15-75 who, during the reference period, were: without work (that is, were not in paid employment or self-employment), currently available for work (that is, were available for paid employment or self-employment), and seeking work (that is, had taken specific steps in a specified recent period to seek paid employment or self-employment). Source: International Labour Organization (ILO), Eurostat, OECD. While commentators in discussions on unemployment frequently use Live Register data, this data source was not specifically designed to measure unemployment.



the average. Dublin accounted for 27% of total national unemployment. Subsequently, Dublin accounted for 22% of all unemployed in the State previously employed in construction, and for one third of those previously employed in wholesale & retail. (Table 20)

Table 20. Unemployment by sector and region, (000s) Q4 2015

Sector	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	State
Agriculture	*	*	*	*	*	*	*	*	3.4
Industry	1.8	2.3	2.3	*	1.8	2.0	2.5	1.8	15.4
Construction	3.4	5.4	1.8	2.3	1.8	4.1	3.3	2.9	24.9
Wholesale & retail	1.2	6.7	2.0	2.0	1.3	3.4	2.2	2.1	20.8
Transport & storage	*	1.6	*	*	*	*	*	*	4.9
Accommodation & food	2.1	2.2	*	*	1.0	1.0	1.4	*	10.1
ICT	*	1.8	*	*	*	*	*	*	3.3
Financial & insurance	*	1.9	*	*	*	*	*	*	3.3
Professional services	*	1.6	*	*	*	*	*	*	5.5
Admin. & support	*	2.2	1.0	*	*	*	*	*	5.6
Public admin. & defence	*	1.4	*	*	*	*	*	*	3.1
Education	*	*	*	*	*	*	*	*	4.0
Health & social work	*	2.0	1.5	0.6	0.6	1.0	1.1	1.4	9.0
Other NACE activities	*	1.7	*	*	*	*	*	*	6.1
No sector stated	2.3	7.0	2.4	1.6	1.9	3.5	3.5	2.0	23.9
<i>No previous employment</i>	4.5	11.6	4.1	4.7	2.4	7.3	4.7	4.8	44.2
<b>Total**</b>	<b>18.6</b>	<b>50.0</b>	<b>19.3</b>	<b>14.7</b>	<b>14.1</b>	<b>27.7</b>	<b>22.4</b>	<b>20.8</b>	<b>187.5</b>

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

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

\*\* Total unemployment figures depicted for each region include unemployed reporting no previous employment and unemployed not stating previous occupation.

Table 21 shows unemployment by occupation and region. Overall, over a third of unemployed persons had not stated a previous occupation. Those who were previously employed in skilled trades were the most numerous, closely followed by those who were employed in elementary occupations. In relative terms, the Border, Midland and Mid-West regions had the highest shares of the unemployed who were previously employed in skilled trades, while Dublin had the highest share of those who were employed in associate professional occupations. The South-East regions had the highest shares of unemployed who were previously employed in sales & customer services. Dublin accounted for about two-in-five of all who previously worked as associate professionals and for an equal share of those who worked in administrative occupations in the State.<sup>30</sup> (Table 21)

<sup>30</sup> Refers to the shares of the unemployed who stated their occupation (i.e. the 'not stated/other' category is excluded).

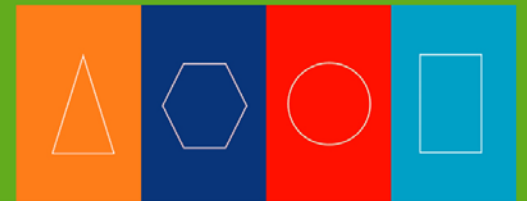


Table 21. Unemployment by occupational group and region, (000s) Q4 2015

Occupation	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Ireland
Managers	*	1.6	*	*	*	*	1.1	*	6.6
Professionals	*	2.4	*	*	*	*	*	2.1	8.0
Associate professionals	*	3.6	*	*	*	*	1.1	*	8.7
Admin & secretarial	*	4.2	1.7	*	*	*	1.1	*	11.0
Skilled trades	3.2	6.1	1.7	2.4	2.2	3.2	3.4	2.4	24.8
Caring/leisure	1.0	1.5	1.0	*	*	1.3	1.2	1.2	8.7
Sales & customer service	*	4.0	1.7	*	*	3.0	1.3	1.4	13.4
Operatives	1.6	3.2	1.5	1.1	*	2.8	2.0	1.8	14.8
Elementary occupations	2.6	4.8	3.0	1.6	2.5	3.9	2.5	2.8	23.6
No occupation stated	2.3	7.0	2.4	1.6	1.9	3.5	3.5	2.0	23.9
<i>No previous employment</i>	4.5	11.6	4.1	4.7	2.4	7.3	4.7	4.8	44.2
<b>Total**</b>	<b>18.6</b>	<b>50.0</b>	<b>19.3</b>	<b>14.7</b>	<b>14.1</b>	<b>27.7</b>	<b>22.4</b>	<b>20.8</b>	<b>187.5</b>

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

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

\*\* Total unemployment figures depicted for each region include unemployed reporting no previous employment and unemployed not stating previous occupation.

Table 22 shows the distribution of unemployed persons by region and education level. In the Border, South-East and Mid-West regions, the share of unemployed with at most lower secondary education was almost a third.<sup>31</sup> The Midland and South-West regions had the highest share of unemployed with some FET qualifications. The share of the unemployed with some third level qualifications was the highest in the West and Dublin regions, at 33% and 30% respectively.

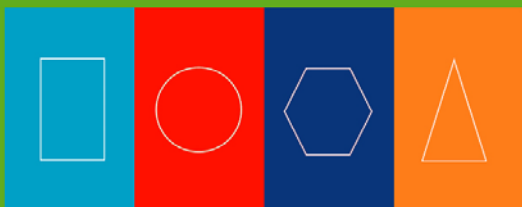
Table 22. Unemployment by education and region, (000s) Q4 2015

Education	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Lower secondary/below	5.5	11.5	4.6	3.6	4.1	8.4	6.2	4.6	48.7
Higher secondary	5.3	15.4	6.9	4.0	4.2	8.9	6.5	5.8	57.0
FET	2.5	6.7	2.7	3.5	2.0	3.8	3.8	3.1	28.2
3rd level non degree	1.7	4.8	1.9	1.6	1.6	2.4	2.0	1.9	18.0
3rd level degree/above	2.3	9.8	3.0	1.8	1.8	3.3	3.4	4.8	30.2
Other/not stated	1.2	1.8	*	*	*	*	*	*	5.5
<b>Total</b>	<b>18.6</b>	<b>50.0</b>	<b>19.3</b>	<b>14.7</b>	<b>14.1</b>	<b>27.7</b>	<b>22.4</b>	<b>20.8</b>	<b>187.5</b>

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

Despite having the lowest share of those unemployed holding at most lower secondary education in the State, Dublin accounted for almost a quarter of them nationally. It also accounted for a third of all unemployed in the State holding third level degree education. (Table 22)

<sup>31</sup> Refers to the shares of the unemployed who stated their education (the highest level attained); i.e. the 'not stated/other' category is excluded.



Across the regions, young people continue to find it relatively more difficult to enter the labour market as evidenced by the finding that those younger than 25 years of age accounted for more than a half of those unemployed with no previous employment experience. Consistent with this, they are characterised by relatively higher rates of unemployment; the youth unemployment rates were particularly elevated in the West, Midland and South-East regions, at 30%, 28%, and 27% respectively, while Dublin had the lowest rate, at 13%.<sup>32</sup>

The position of young people in the labour market can be assessed by using another relevant indicator - the youth unemployment ratio - which effectively takes into account the delayed entry into the labour market by young people due to remaining in education for longer. The youth unemployment ratio was 10% in the South-East, Midland and West regions, which was about twice the ratio reported in all other regions.<sup>33</sup>

### Supply from education and training system

The total output from the national education and training system amounted to almost 99,000 awards over the 2014/2015 period (NFQ 1-10).<sup>34</sup> Dublin accounted for over a third of all national awards (NFQ 1-10). It accounted for two fifths of all awards in the field of science & maths and for an equal share of all awards in business & law and health/welfare. Furthermore, over a third (37%) of all ICT awards were awarded in Dublin (Table 23a)

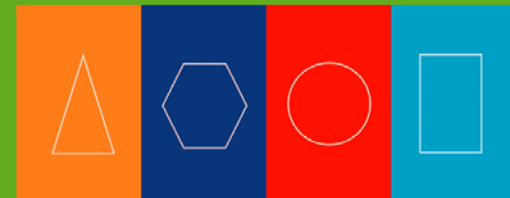
Table 23a. Further and higher education and training awards by field of learning, by region

Field of learning/ Region/	Border	Dublin	Mid- East	Midland	Mid- West	South- East	South- West	West	Total
Agriculture/vet	528	662	117	197	372	626	589	433	3,524
Arts/humanities	682	4,885	1,183	324	1,314	775	1,978	2,057	13,198
Business & law	1,767	8,216	822	940	1,908	1,746	3,370	1,764	20,533
Education	181	1,832	622	*	1,352	130	461	696	5,274
Eng. & construction	880	2,940	78	375	1,091	807	1,432	925	8,528
General learning	478	933	168	267	216	351	226	185	2,824
Health/welfare	1,976	8,771	1,120	1,377	1,850	2,458	3,330	1,710	22,592
ICT	342	1,512	150	189	440	290	801	417	4,141
Science/maths	451	2,263	395	126	426	166	1,114	739	5,680
Services	832	1,754	154	399	564	1,015	1,288	630	6,636
Social sciences/journalism	188	2,620	623	42	448	147	904	832	5,804
<b>Total</b>	<b>8,305</b>	<b>36,501</b>	<b>5,432</b>	<b>4,236</b>	<b>9,981</b>	<b>8,511</b>	<b>15,493</b>	<b>10,388</b>	<b>98,847</b>

Source: QQI (FET major awards, 2015), HEA (HE awards 2014/2015)

<sup>32</sup> Regional profile chapters (c.f. Report pages: 52, 59, 66, 73, 80, 87, 94, and 101).

<sup>33</sup> The youth unemployment ratio has the same numerator as the youth unemployment rate, but the denominator is the total population aged 15-24.



In 2015, there were approximately 32,300 major awards made by QQI to FET learners across levels 1-6 on the NFQ in the State.<sup>35</sup> Nationally, the highest number of awards were in health/welfare (over a third), followed by business & law (15%), arts/humanities (13%) and services (11%); in contrast, there were very few QQI/FET awards in ICT and in science/maths, which is in part a reflection of the existence of awarding bodies other than QQI (e.g. City & Guilds, as well as industry/vendor provider awarding bodies such as Comptia, Microsoft, CISCO, etc.).

Dublin accounted for almost a third QQI/FET awards (30% of the total), while the Mid-East accounted for 6%, the lowest share of all regions. The South-West accounted for 14%, and the Border and South-East regions each accounted for 13%. Dublin accounted for a third of FET/QQI awards in science & maths and for an equal share of awards in social sciences/journalism, while its share of health/welfare awards was 35%; it also accounted for over a half of awards in the ICT field.

Within regions, the Border region had the highest share of awards in general learning, with 12% of all QQI FET awards in the region categorized in this field, closely followed by the Midland region with 11%; in contrast, the Mid-West had the lowest (5%) share of its awards in this field. The Mid-East region had the highest share of awards in health & welfare, with 43% of all QQI/FET awards categorised in this field, followed by Dublin, where the corresponding figure was 41%. The Mid-East had the lowest share of awards in services, only 5%, whereas the corresponding figure for the South-West was 15%. (Table 23b)

Table 23b. QQI/FET major awards\* by field of learning, by region, 2015

Region/ Field of learning	Border	Dublin	Mid- East	Midland	Mid- West	South- East	South- West	West	Total
Agriculture/vet	394	264	117	148	372	458	468	365	2,586
Arts/humanities	330	1,503	261	270	293	502	646	363	4,168
Business & law	737	1,278	327	329	454	561	664	483	4,833
Education	*	*	*	*	*	*	25	*	25
Eng. & construction	239	478	10	128	140	231	287	138	1,651
General learning	478	811	151	255	216	323	226	167	2,627
Health/welfare	1,275	3,978	818	888	915	1,412	1,391	806	11,483
ICT	3	24	11	*	*	*	6	*	45
Science/maths	30	67	40	9	15	11	35	*	207
Services	435	917	92	197	348	466	720	314	3,489
Social sciences/journalism	181	399	73	29	79	106	202	135	1,204
<b>Total</b>	<b>4,102</b>	<b>9,719</b>	<b>1,900</b>	<b>2,254</b>	<b>2,832</b>	<b>4,070</b>	<b>4,670</b>	<b>2,771</b>	<b>32,318</b>

Source: SLMRU (SOLAS) analysis of QQI (QQI/FET major awards) data

\* FET data omits cells too small to report, therefore the totals for each region do not add up to the national total.

<sup>35</sup> FET awards data and statistics presented in this report are a subset of all FET data, this subset being confined to those obtaining QQI awards. Therefore, activities that do not lead directly to certification (e.g. adult literacy), and FET awards by other award bodies (e.g. City & Guilds) are not included. For illustrative purposes, it is estimated that there were 259,000 new learners in the FET sector in 2015 altogether. (Source: SOLAS, Annual report 2015).

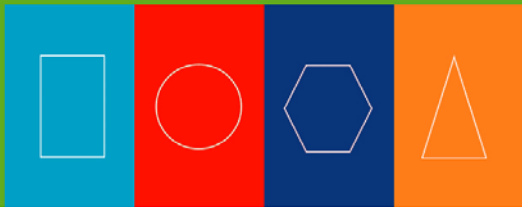


Table 23c. Higher education awards by field of learning, by region\*, 2014

	Border	Dublin	Mid-East	Midland	Mid-West	South-East	South-West	West	Total
Agriculture/vet	134	398	*	49	*	168	121	68	938
Arts/humanities	352	3,382	922	54	1,021	273	1,332	1,694	9,030
Business & law	1,030	6,938	495	611	1,454	1,185	2,706	1,281	15,700
Education	181	1,832	622	*	1,352	130	436	696	5,249
Eng. & construction	641	2,462	68	247	951	576	1,145	787	6,877
General learning	*	122	17	12	*	28	*	18	197
Health/welfare	701	4,793	302	489	935	1,046	1,939	904	11,109
ICT	339	1,488	139	188	440	290	795	417	4096
Science/maths	421	2,196	355	117	411	155	1,079	739	5473
Services	397	837	62	202	216	549	568	316	3,147
Social sc./journalism	7	2,221	550	13	369	41	702	697	4,600
<b>Total*</b>	<b>4,203</b>	<b>26,782</b>	<b>3,532</b>	<b>1,982</b>	<b>7,149</b>	<b>4,441</b>	<b>10,823</b>	<b>7,617</b>	<b>66,529</b>

Source: SLMRU (SOLAS) analysis of HEA data (2014/2015)

\* HEA data omits cells too small to report, therefore the totals for each region do not add up to the national total.

The number of higher education awards (NFQ 6-10) made to learners at IoTs and universities in 2014 amounted to approximately 66,500.<sup>36</sup> The highest share of these (almost a quarter) were for business & law, a further 17% were for health/welfare, while there were 14% for arts/humanities, 10% for engineering & construction, 8% for science/maths, and 6% for ICT. Dublin accounted for 40% of all higher education awards in the State. Furthermore, it accounted for 44% of business & law awards, 43% of health/welfare, 40% of science & maths, and 36% of ICT awards.

The Midland region had the highest relative share of business & law awards, at almost a third of its total; in contrast, only 14% of higher education awards in the Mid-East region were in this field. The Border region had the highest share of awards in engineering & construction (15%); in contrast, the Mid-East region had only 2% of its higher education awards in this field. The Mid-East also had the lowest share of ICT awards (4%), whereas the Midland region had the highest relative share (9%). The South-East had the lowest share of its awards in the field of science & maths (3%); the Midland and Mid-West regions also had the relative share of these awards that was lower than the State average, which was 8%. (Table 23c)

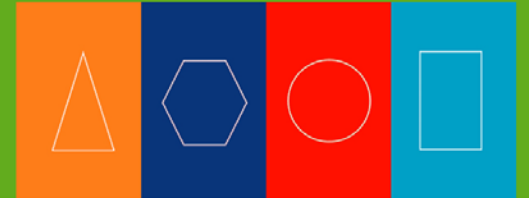
The share of the population aged 30 to 34 that have completed tertiary education ranged from 35% in the South-East region to 65% in Dublin.<sup>37</sup>

The share of population (aged 25-64 years) that engaged in lifelong learning ranged from 4.6% in the Border, to almost 10% in Dublin.

<sup>36</sup> In addition to the awards from universities and the institutes of technology, other providers of higher education (e.g. private, independent colleges, run programmes leading to QQI higher education awards spanning levels 6-10 on the NFQ. In 2014, there were over 5,000 major awards in the higher education outside the HEA-aided sector, but these are not included in this report.

<sup>37</sup> The Europe 2020 strategy sets out a target of 'reducing school drop-out rates to less than 10 % and increasing the share of the population aged 30 to 34 having completed tertiary or equivalent education to at least 40%' by 2020; the national target regarding tertiary attainment for Ireland is 60% (*Ireland's National Skills Strategy 2025* (2016), Department of Education and Skills). This educational attainment refers to ISCED (International Standard Classification of Education) 2011 level 5-8; *Smarter, greener, more inclusive: Indicators to support the Europe 2020 strategy*, (Europe 2020 education targets) (URL: <http://ec.europa.eu>).





It is estimated that, in each region, the supply could be enhanced by further promoting the engagement of young people with the education and training system. In addition, regarding young people, there is a rather complex interplay between participating in the labour market and partaking in education and training. Therefore, in addition to the youth unemployment rate discussed within the theme of unemployment, other relevant indicators, such as early leavers from education and training and whether young people are engaging with the education system, as well as the labour market, could also be considered.

Notwithstanding continued improvements in retention and graduation rates at secondary level, with the rate of students completing the Leaving Certificate exceeding 90%,<sup>38</sup> early leaving from education and training still remains a concern for policy makers and is relevant for the provision of FET at regional level. In quarter 4 2015, the share of early leavers from education and training was above the national average in the Border, Midland, West, and South-East regions.<sup>39</sup>

In addition to being early leavers from education and training, young people can be disengaged from both education and from the labour market. This heterogeneous group of young people who are neither in employment nor in education and training is referred to as 'NEET'.<sup>40</sup> This group can potentially join the labour market in the future, and as such, it is considered a target group for labour market interventions and FET provision.

There remains a sizeable section of young people in each region that are classified as NEET; the highest NEET rate (for those younger than 25) was in the Midland (19%), followed by the South-East region (16%), while the lowest rates were in the Mid-West (10%) and Dublin regions (9%). It is worth noting that the NEET rates for those aged 24-35 were even higher, exceeding 20% in three regions.

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<sup>38</sup> Department of Education and Skills (2015) Retention Rates of Pupils in Second Level Schools - 2008 Entry Cohort. The report found that, of the 2008 entry cohort, 96.9% sat the Junior Certificate Exams in 2011 or 2012 and 90.6% completed their Leaving Certificate Exams in 2013 or 2014. The number of students categorised as early leavers has been declining; thus early leavers in 2011, i.e. those pupils who were enrolled in post-primary schools in the 2010/2011 academic year but not enrolled in one of these schools one year later, in the 2011/2012 academic year, is estimated to be approximately 7,600. Furthermore, over 50% of Early Leavers went on to further education or training or continued second-level education in Ireland subsequently. Source: Early-Leavers-What-Next-2016-Report (URL: [www.education.ie/en/Publications](http://www.education.ie/en/Publications))

<sup>39</sup> The indicator is defined as the percentage of the population aged 18-24 with at most lower secondary education and who were not in further education or training during the last four weeks preceding the survey. (CSO, QNHS); Eurostat.

<sup>40</sup> The indicator on young people neither in employment nor in education and training (NEET) provides information on young people aged 15 to 24 who meet the following two conditions: (a) they are not employed (i.e. they are either unemployed or inactive according to the International Labour Organisation definition) and (b) they have not received any education or training in the four weeks preceding the survey; data is expressed as a percentage of the total population in the same age group and gender, excluding the respondents who have not answered the question 'participation in education and training' (CSO, Ireland, Eurostat). While the main focus is on youth (age group 15-24), it is informative, especially from the perspective of labour market intervention and FET provision, to consider the 25-34 age group as well; data presented relates to Q4 2015. The NEET statistics can be seen as complementary to the youth unemployment rate since the latter is heavily influenced by the size of the youth labour market (i.e. for calculating the NEET rate, the denominator is the total population aged 15 to 24, whereas for calculating the unemployment rate only those aged 15-24 in the labour force are considered). The youth unemployment ratio has the same numerator as the youth unemployment rate, but the denominator is the total population aged 15-24 (as is the case with the NEET rate).

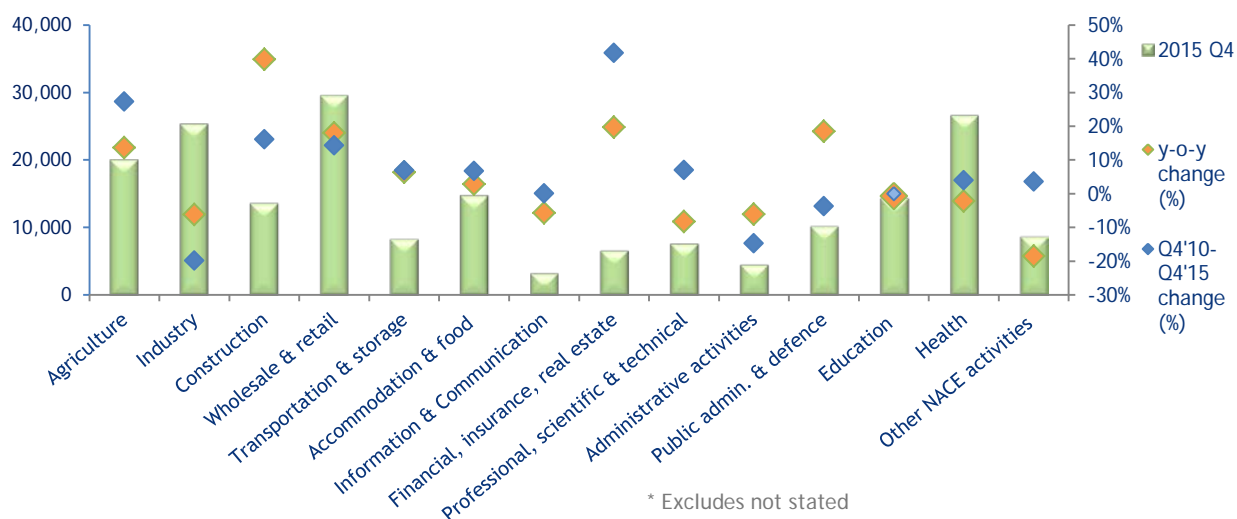


## 2. Border



Population	494,500
Working age (15-64)	304,200
Labour force	213,600
Employment	195,000
Unemployment	18,600
Participation rate	56.5%
Employment rate (20-64)	67.8%
Unemployment rate	8.7%
GVA per person (€)	€21,445
GVA per person (State = 100)	60.5

Figure 2.1 Employment by economic sector Q4 2015, y-o-y (%), and Q4 2010 - Q4 2015 change (%), (Border)

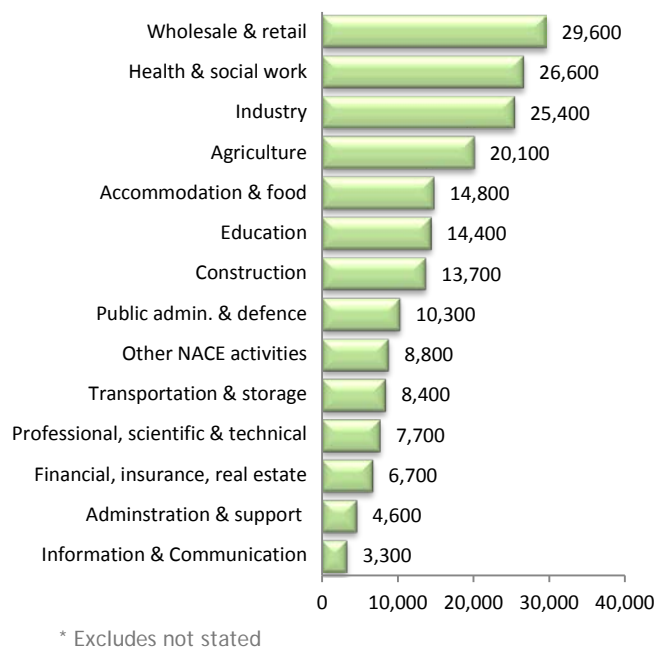


Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were 213,600 persons in the labour force in the region, an increase of 3% year-on-year; the participation rate was 56.5%, which was 2.5 percentage points higher than a year ago
- There were 195,000 persons in employment, which was approximately 9,000 persons more than in quarter 4 2014, and 4% higher than five years ago; 19% were self-employed; the employment rate (20-64 years) was 68%
- Wholesale & retail, health & social work, and industry were the largest sectors of employment; agriculture was the fourth largest, accounting for 10%
- Knowledge intensive services (market, high tech and financial) accounted for 10% of employment.

Figure 2.2 Employment by economic sector\* (Border), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

Figure 2.3 Employment by occupation\* (Border), Q4 2015



\* Excludes not stated

Source: SLMRU (SOLAS) analysis of CSO data

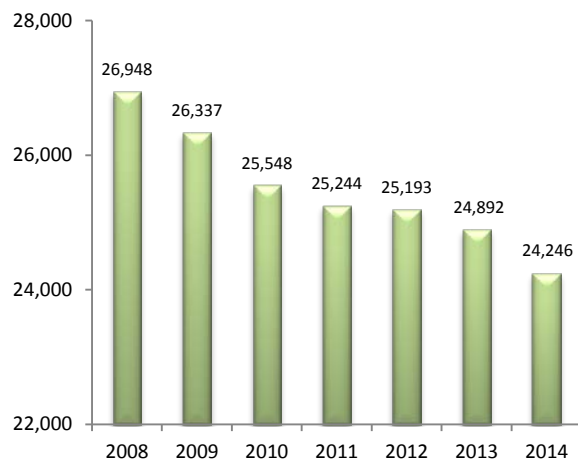
#### Employment by occupation

- In quarter 4 2015, there were approximately 39,400 persons employed in skilled trades, accounting for one fifth of total employment in the Border region; within this occupation, farmers accounted for over a third
- Just above 28,000 persons were employed in professional occupations, accounting for 15% of regional employment; there were 24,500 persons employed in elementary occupations, which was lower than a year previously
- One-in-ten were employed in caring, leisure and related, and about the same share were in administrative and in associate professional occupations
- The largest increases year-on-year were observed for administrative and sales/customer services occupations.

#### Employment by occupation and sector

- In quarter 4 2015, over a quarter of managers were employed in wholesale & retail (proprietors) and almost a fifth in accommodation & food services and industry
- Two thirds of professionals worked in the public sector (public admin. & defence, health and education); the public sector also employed the largest share of associate professionals - almost a third of them worked in this sector, while relatively large shares were in industry, wholesale & retail and financial services
- About a third of those in administrative occupations were in the public sector, and one-in-eight were in financial services
- Two fifths of those employed in skilled trades were in agriculture, where they accounted for three quarters of sectoral employment; sizeable numbers of those in skilled trades were employed in industry and in construction, where they comprised a quarter, and a half of sectoral employment respectively
- Two thirds of those in caring & leisure occupations were in the public sector (health), where they comprised a quarter of sectoral employment
- Two fifths of operatives were in industry and one quarter in transport; they accounted for a quarter and for a half of employment in these respectively
- The largest share, almost a third, of those in elementary occupations were in accommodation & food; industry was their second largest sector of employment
- Within occupational groups, the highest employment was in the following occupations:
  - Managers: functional managers and directors , managers in wholesale & retail
  - Professionals: teachers (secondary & primary), nurses & midwives, accountants
  - Associate professionals: business sales executives and sales accounts/business development managers
  - Administrative: general admin., PA & secretaries, book keeping & payroll management, bank clerks
  - Skilled trades: farmers, chefs, metal working production & maintenance fitters, electricians
  - Services: care workers & home carers, caretakers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants, cashiers, etc.
  - Operatives: drivers - large goods vehicle drivers, food operatives, routine operatives
  - Elementary: kitchen & catering assistants, waiting staff, bar staff, construction and farm workers.

Figure 2.4 Active enterprises: Business Economy (Border)



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

#### Active enterprises

- In 2014, there were approximately 24,250 active enterprises in the private business economy in the Border region, slightly below the 2013 figure
- Construction accounted for the largest share of active enterprises (almost a quarter), followed by wholesale & retail; professional services and accommodation & food each accounted for about one-in-ten
- 92% of active enterprises in the Border region were micro enterprises; they accounted for 39% of persons engaged; SMEs (all enterprises with less than 250 persons engaged) accounted for almost nine-in-ten of persons engaged, the largest share of all regions
- Over the period 2008-2014, the number of active enterprises declined by about 2,700 or 10%.

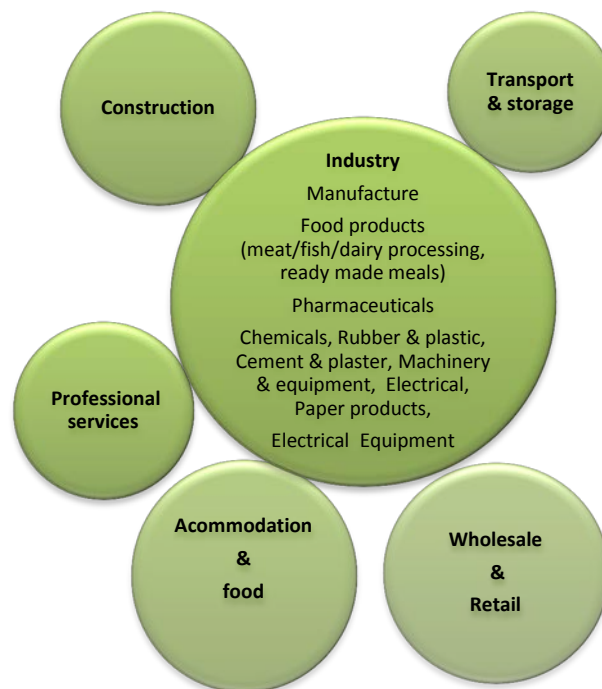
#### Regional economy output (GVA), Border, 2013

- Economic output in 2013 amounted to just over €21,445 per person
- In relative terms (expressed as an index relative to the State (State = 100)) the GVA index for the Border region was 60.5, amounting to an improvement in relation to 2012
- The region accounted for 6.8% of the State's economic output.

#### Medium to large enterprises by sector, 2015 (Border)

- Outside the public sector, the highest number of medium to large enterprises (employing 50 persons or more) in the Border region in 2015 was found in industry, followed by accommodation & food services, and wholesale & retail
- Within industry, the largest companies were in manufacturing, particularly in food processing, electrical equipment, chemicals, plastics, and furniture
- Within wholesale & retail the largest companies were in general retail
- Within accommodation & food services, hotels were the largest employers
- Civil engineering companies were the largest enterprises in construction activities.

Figure 2.5 Sectors with largest enterprises (Border), 2015



Source: Analysis by SOLAS (SLMRU) based on DataIreland

Figure 2.6a Industrial units (Border)

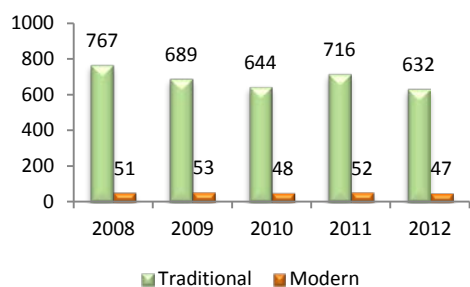
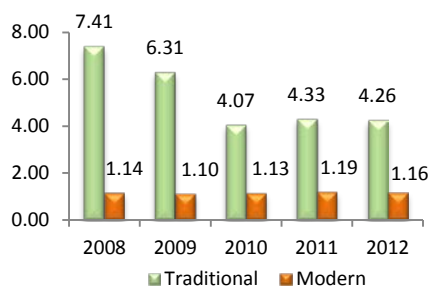


Figure 2.6b Gross output in industrial units (Border), (€ billion)



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

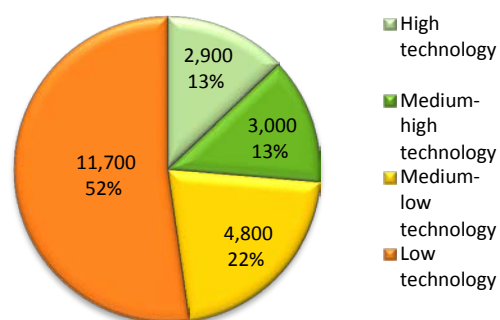
### Industrial activity in the Border region

- In 2012, 93% of all industrial units were in the traditional sector; over the period 2011 - 2012, the number of units decreased in both sectors; the number of persons engaged declined in the traditional and remained unchanged in the modern sector;
- Over the period 2008-2012, the number of industrial units declined by 18% in the traditional sector and by 8% in the modern sector; the number of persons engaged in industry declined, due to the contraction of the traditional sector
- Over the period 2011-2012, the value of gross output decreased marginally in both sectors; while only 7% of units were in the modern sector, their contribution to the regional gross industrial output amounted to 21%; this was the lowest share of all regions
- Approximately four fifths of persons were engaged in SMEs; SMEs accounted for four fifths of industrial output
- In 2012, approximately 14,400 persons were engaged in Irish owned industrial units, while 6,200 were in foreign owned units; the latter accounted for 35% of the gross output, the lowest share across all regions; the Border also had the lowest average wage per person engaged in industry in 2012
- In 2012, the share of industrial output exported was 55.6%, the second lowest across the regions; within manufacturing activities, there were 16,500 persons in exporting units, while 4,000 were in non-exporting units; when compared with 2009, the numbers engaged declined in the former, by 2,000 persons, and marginally increased in the latter.

### Manufacturing employment

- In quarter 4 2015, there were 22,300 persons employed in manufacturing in the Border region
- Approximately 3,000, (13% of the total), were employed in each high and medium-high technology manufacturing (the latter mostly machinery and equipment)
- 11,700 were employed in low tech manufacturing, mostly in the food and beverage segment (which alone accounted for 40% of total manufacturing employment)
- The Border region had the highest share of employment in low technology manufacturing and conversely, the lowest share of its manufacturing employment in the high tech segment.

Figure 2.7 Manufacturing employment (Border), Q4 2015



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

## Unemployment

- In quarter 4 2015, there were approximately 18,600 unemployed persons in the Border, amounting to 10% fewer than a year ago; 62% of those unemployed were long term unemployed (the long term unemployment rate was 5%); one quarter have never been in employment
- **Age:** those aged 25-34 accounted for a quarter of all unemployed; 16% were younger than 25; the youth unemployment rate was 17%; the youth unemployment ratio was 5.5%
- **Education:** almost a third of those unemployed in the region had attained at most lower secondary education, which was almost the same as the share of those with upper secondary; 15% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship (FET); almost a quarter had some third level education
- **Sector:** those previously employed in construction accounted for the largest share of unemployed
- **Occupation:** the majority of unemployed persons were previously employed in elementary occupations and skilled trades.

Figure 2.8 Unemployment by age (Border) Q4 2015

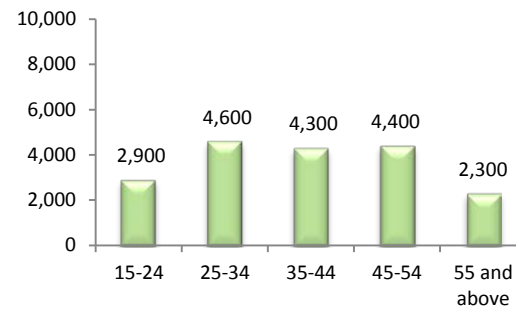
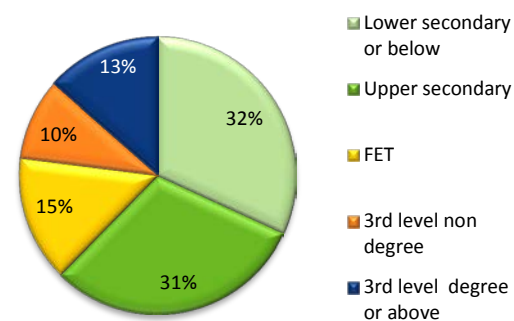


Figure 2.9 Unemployment by education\*, (Border) Q4 2015



\*Excludes not stated

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

Figure 2.10a PES job seekers (Border), April 2016

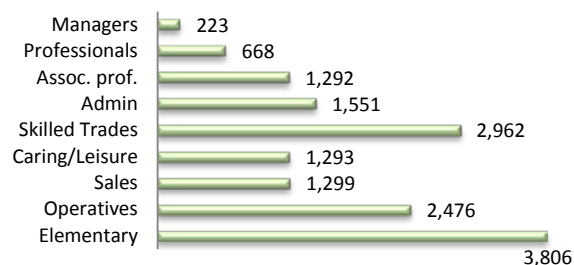
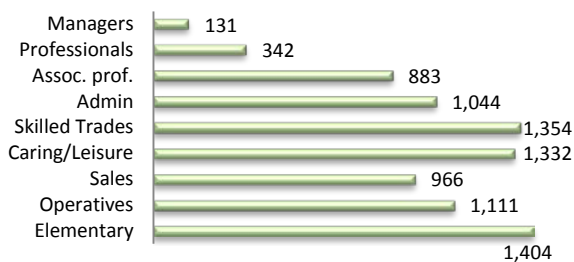


Figure 2.10b PES vacancies (Border), Jan-Dec 2015



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

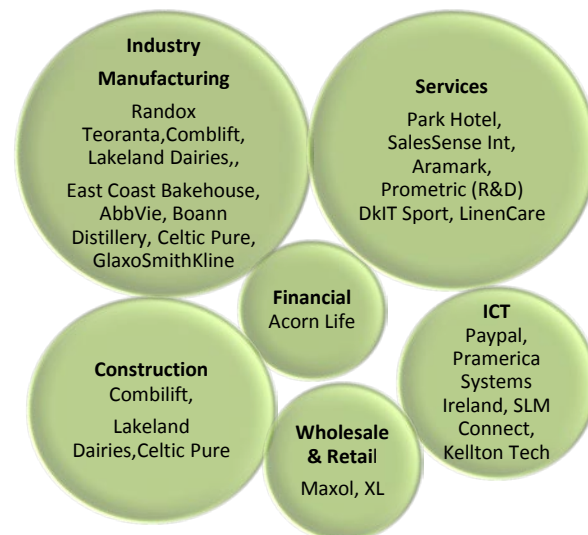
## Live Register, PES job seekers and vacancies, Border

- In May 2016, there were approximately 43,900 persons on the Live Register in the region
- In April 2016, approximately 15,600 job seekers were registered with the PES; the highest share, a quarter, had previously worked in elementary occupations, almost one fifth in skilled trades, 16% as operatives, and 10% in administrative occupations
- In 2015, over 8,500 vacancies were advertised through DSP Jobs Ireland in the Border region; the highest number of vacancies was in elementary occupations (e.g. catering staff, cleaners, security guards), skilled trades (mainly chefs, but also electricians, welders/fabricators and butchers) and caring (care workers), followed by administrators (census enumerators) and operatives (process operatives).

### Employment growth and job creation, Border

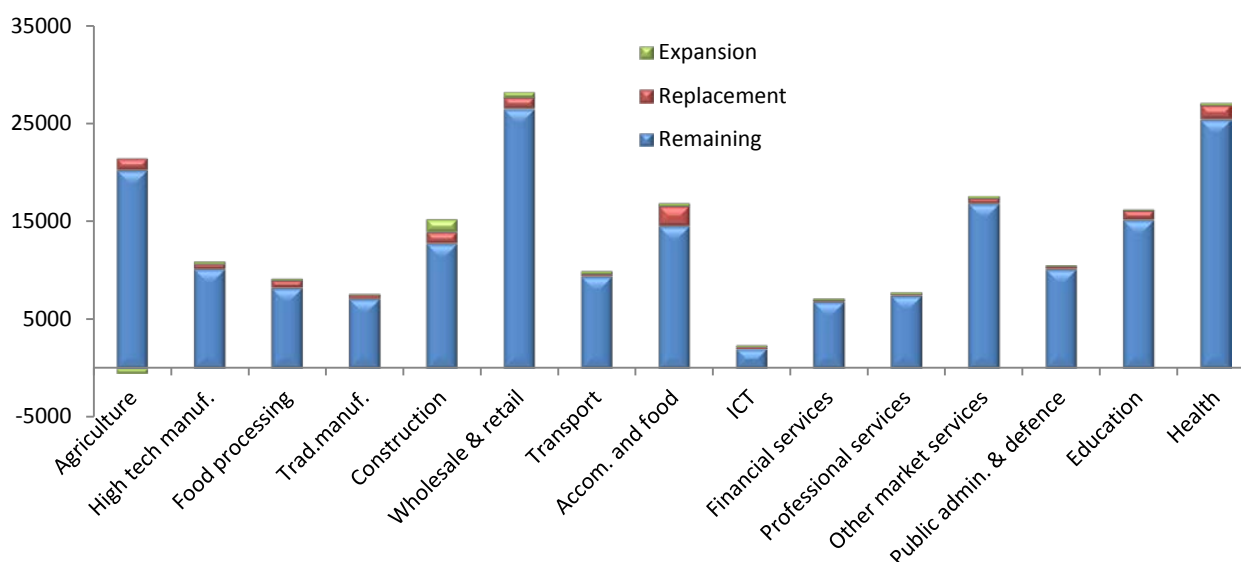
- Over the period quarter 4 2014 to quarter 4 2015, employment grew by 5%; most notably, it expanded in wholesale & retail and construction, and to a lesser extent, in agriculture and in financial services
- Over the period quarter 4 2010 to quarter 4 2015, employment increased by 4%; over this five year period, employment expanded in agriculture, wholesale & retail, and construction and financial services; it however contracted in industry
- Job announcements suggest that job opportunities in the short to medium term are set to arise primarily in industry, services, construction, financial services, construction and information and communication
- Annual employment projections suggest that for each sector, replacement demand exceeds expansion demand; the only exception is construction, where these two components of total sectoral recruitment requirement are effectively identical; in the short-term, replacement demand for the region is estimated at 11,000 while expansion demand is projected at 4,500. (Figure 2.12)

Figure 2.11 Job creation announcements (Border), 2015 & 2016



Source: Analysis by SOLAS (SLMRU), various sources

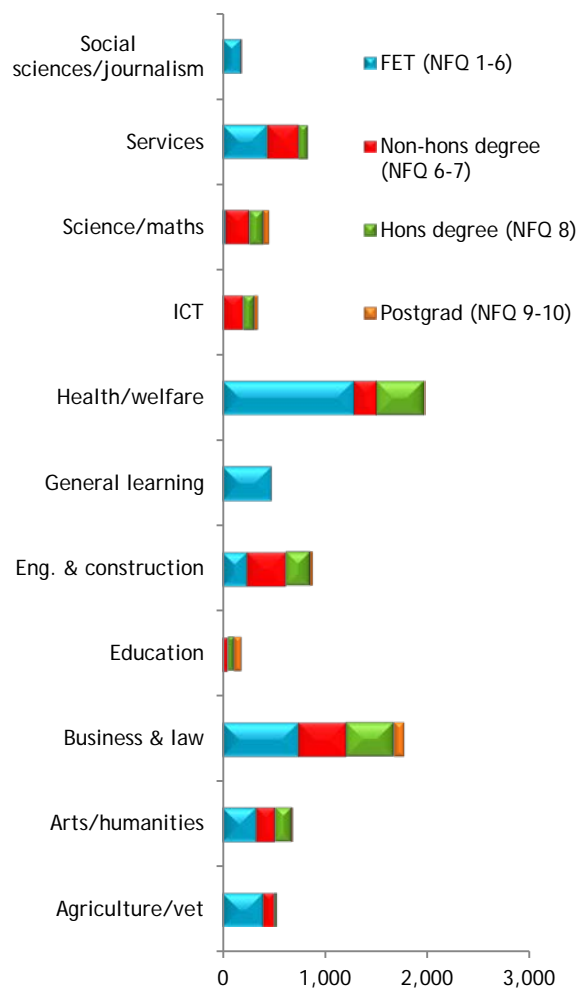
Figure 2.12 Employment projections by sector - annual recruitment requirement\*, Border



Source: SLMRU analysis; \* annual projections are based on 2015 annual average employment figures



Figure 2.13 QQI/FET and HE awards (Border)



Source: QQI (FET major awards, 2015); HEA awards, 2014/2015

#### Education and training awards and education indicators (Border)

- Of the total of approximately 8,300 awards (FET and HE combined), the largest numbers were in health/welfare (accounting for almost a quarter), followed by business & law
- Of approximately 4,100 QQI/FET awards (NFQ 1-6), the largest share, almost a third of awards were in health/welfare; almost a fifth of awards were in business & law; agriculture and services each accounted for about one-in-ten of QQI/FET awards, while general learning amounted to almost one-in-eight
- Higher education awards at undergraduate level (totalling approximately 4,200) were mostly in business & law, health, and engineering & construction, accounting for 25%, 17%, and 15% respectively; 10% of higher education awards were in science & maths, and 8% were in ICT; the combined share of science & maths and ICT awards, of 18%, was the highest of all regions
- Regarding postgraduate awards, about a third were in business & law.

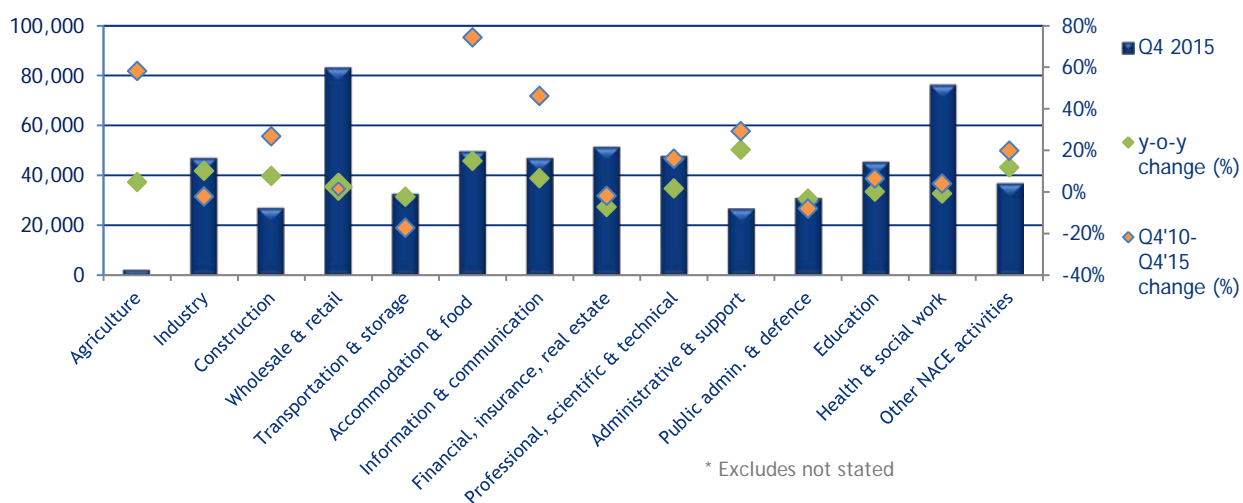
#### Education indicators (quarter 4 2015):

- Early leavers from education and training (18-24 years): 8.4%
- NEET (15-24 years): 11%
- Lifelong learning (25-64 years): 4.6%
- Tertiary educational attainment (30-34 years): 43%.

### 3. Dublin



Figure 3.1 Employment by economic sector\* Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%) (Dublin)



Source: SLMRU (SOLAS) analysis of CSO data

#### Labour force, participation, and employment

- In quarter 4 2015, there were 660,400 persons in the labour force in Dublin, an increase of almost 3% y-o-y; the participation rate was 63.2%, the highest of all regions
- There were 610,400 persons in employment, 23,000 more than in quarter 4 2014; 12% were self-employed, the lowest share of all regions; the employment rate (20-64 years) was 72%, the highest of all regions
- Wholesale & retail was the largest sector of employment, followed by health
- Knowledge intensive (market, high tech, financial) services accounted for a quarter of employment, the largest share of all regions, the public sector accounted for 25%, and the information & communication sector for 8%.

Figure 3.2 Employment by economic sector (Dublin), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 3.3 Employment by broad occupation\* (Dublin), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

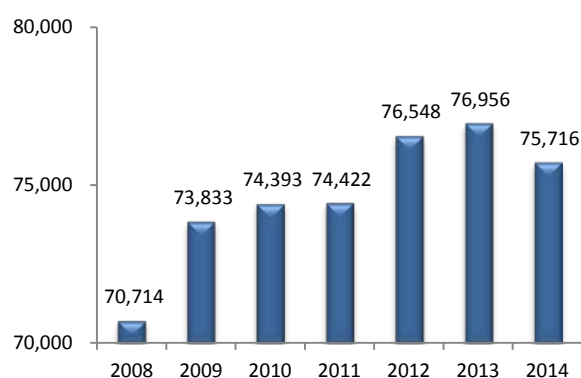
#### Employment by occupation

- In quarter 4 2015, professionals were the largest occupational group, totalling 134,300 persons, followed by associate professional occupations totalling 87,200; these two occupations combined accounted for 37% of employment in the region
- There were approximately 59,500 managers, directors and senior officials working in the region, accounting for 10%
- Administrative occupations totalled 72,800 and were the third largest occupational grouping
- Almost 71,000 were employed in elementary occupations while 32,500 persons worked as operatives - both of these occupations grew strongly year-on-year.

#### Employment by occupation and sector

- In quarter 4 2015, 25% of managers were employed in wholesale & retail, 15% were in financial services, 10% in industry, and 11% in the public sector (comprising health, education and public admin. & defence)
- 47% of all professionals were employed in the public sector, where they accounted for one-in-four of all employed in this broad sector; almost a fifth were employed in professional services, where they accounted for just above one half of all employed in the sector; 15% were working in the information and communication sector where they accounted for just above one-in-four of sectoral employment
- Associate professionals were also most likely to be employed in the public sector, with one fifth of them working there; 15% of them were working in financial services and 11% in wholesale & retail
- 27% of skilled trades were based in construction, while just under one fifth were in accommodation & food services and in construction (18% and 17% respectively)
- Approximately one third of all employed in administrative occupations were in the broad public sector and one fifth were in financial services
- Almost two thirds of all employed in caring & personnel services occupations were in the public sector (health)
- One half of operatives were employed in transport, while less than a fifth were employed in industry
- Two fifths of persons employed in elementary occupations were in accommodation & food, accounting for over a half of the total employment in the sector
- Within occupational groups, the highest employment was found in the following:
  - Managers: functional managers & directors, managers in retail, shopkeepers & proprietors
  - Professionals: medical practitioners, teachers (secondary & primary), nurses & midwives, IT professionals, accountants
  - Associate professionals: business sales executives, sales accounts and business development managers, police officers
  - Admin/secretarial: book-keepers, payroll managers and wages clerks, PAs & other secretaries, and generic admin occupations
  - Skilled trades: chefs, fitters
  - Services: care workers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants, cashiers and checkout operators
  - Operatives: drivers (taxi & cab, truck drivers)
  - Elementary: kitchen & catering assistants, waiting staff, construction workers, cleaners & domestics.

Figure 3.4 Active enterprises: Business Economy (Dublin)



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

#### Active enterprises

- In 2014, there were approximately 75,700 active enterprises in the Dublin region
- While reporting a small decline y-o-y, Dublin was the only region where the number of active enterprises increased in relation to 2008, by approximately 5,000
- Professional activities accounted for the largest share of active enterprises, just over a fifth operated in this sector- this was the largest share of all regions; 10% were in information & communications, 5% in financial service - for each of these sectors, Dublin had the largest share of all regions
- 91% were micro enterprises, accounting for less than a fifth of employment in the business economy; this was the lowest share of all regions; conversely, large enterprises accounted for almost half of employment, the largest share of all regions.

#### Regional economic output (GVA), Dublin, 2013

- Economic output in 2013 amounted to €70.8 billion, translating into €55,365 per person
- In relative terms (State = 100) GVA index was 156.1
- The region accounted for 43.3% of the State's economic output.

#### Medium to large enterprises by sector

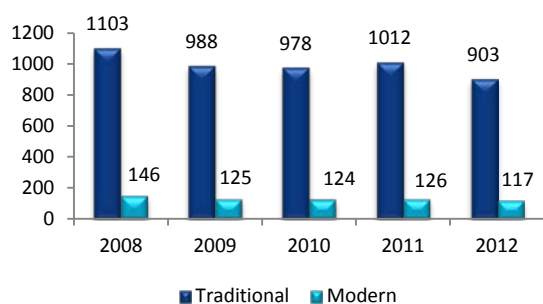
- The highest number of medium to large enterprises was found in wholesale & retail, industry professional and financial activities, ICT, administrative & support services, and transportation
- Within industry, the largest companies were in power generation, recycling, and manufacturing (food & beverage, computer, electronic & optical products, pharmaceutical, chemicals, printing & reproduction of recorded media)
- Within professional services, large enterprises were in legal & accounting, management consultancy, and architectural & engineering activities
- Within the financial sector, the largest enterprises were in insurance, reinsurance & pension funding, and financial intermediation
- Within the ICT sector, large employers were in publishing, broadcasting and programming & consultancy.

Figure 3.5 Sectors with largest enterprises, Dublin, 2015



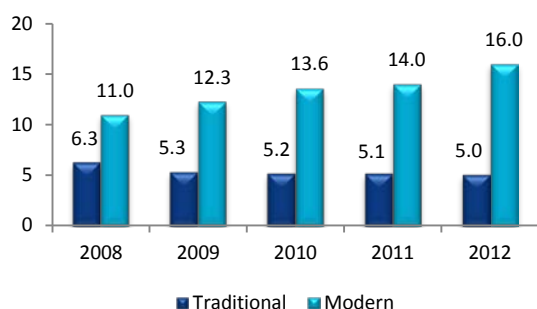
Source: Analysis by SOLAS (SLMRU) based on DataIreland data

Figure 3.6a Industrial units (Dublin)



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

Figure 3.6b Gross output in industrial units (Dublin), € billion



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

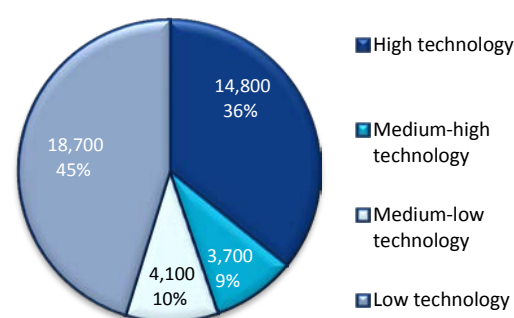
### Industrial activity

- In 2012, Dublin had 1,020 industrial units, 89% in the traditional segment; the modern sector accounted for 35% of all persons engaged in industrial activities and for three quarters of the value of region's gross output in 2012; the value of output in the modern sector increased from €14 billion in 2011 to €16 billion in 2012; it marginally declined in the traditional segment
- Over the period 2011-2012, the number of industrial units decreased, a reversal of the situation observed for the period 2010 to 2011; the number of persons engaged increased by 1,500 - the modern sector expanded by 3,200, while the traditional sector contracted by 1,700
- Over the period 2008-2012, the number of industrial units declined by almost a fifth; the number of persons engaged in industrial activities declined overall (by 7,600) due to the decline in the traditional sector; the modern sector expanded slightly
- In 2012, approximately 17,500 persons were engaged in Irish owned industrial units, and 15,000 in foreign owned units; the latter accounted for 86% of the gross industrial output; approximately 19,400 persons (or 60%) were engaged in industrial units classified as SMEs; SMEs accounted for 40% of the region's industrial gross output
- Within manufacturing alone, in 2012, those working in exporting units outnumbered those in non-exporting - the former amounted to approximately 21,900 persons, the latter to approximately 10,500; like in all other regions, the number of persons engaged in exporting units declined in relation to 2009; however, together with the Border region, Dublin was the only region to report an increase in the number of persons engaged in non-exporting units.

### Manufacturing employment

- In quarter 4 2015, there were 41,200 persons employed in manufacturing in the Dublin region
- More than a third (36%) were employed in the high tech segment (pharmaceutical and computer, electronic and optical products)
- 18,700 persons (45%) were employed in low tech manufacturing (mostly in food & beverages and printing)
- 10% were employed in medium-low tech manufacturing and 9% in medium-high tech manufacturing.

Figure 3.7 Manufacturing employment (Dublin), Q4 2015

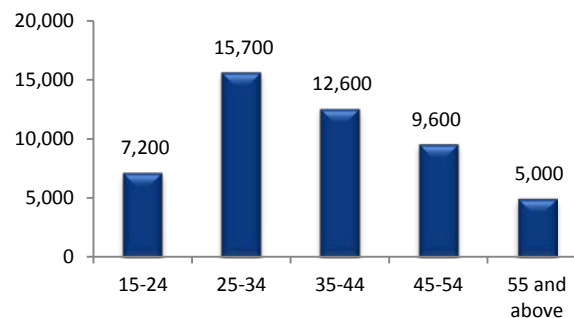


Source: Analysis by SOLAS (SLMRU) based on CSO data

### Unemployment

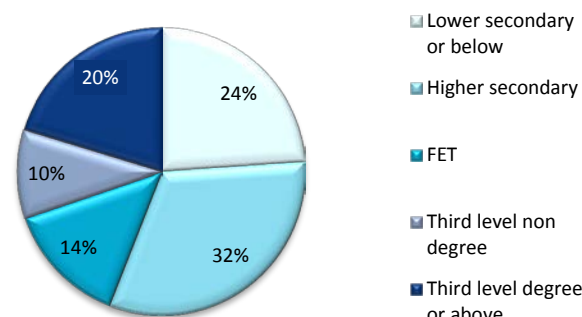
- In quarter 4 2015, there were 50,000 unemployed persons in the Dublin region; just above a half were long-term unemployed (the long term unemployment rate was 3.7%); 23% have never been in employment
- **Age:** 31% of unemployed were aged 25-34 and 25% were aged 35-44; those aged under 25 comprised 14% of all unemployed persons in the region; the youth unemployment rate was 12.7%, while the youth unemployment ratio was 5.3%
- **Education:** almost a quarter of those unemployed in this region had achieved at most lower secondary education, while almost a third had upper secondary; 14% had some FET qualification while 30% had some third level education
- **Sector:** those previously employed in wholesale & retail accounted for the largest share of unemployed (with previous or stated employment experience), followed by those who previously worked in construction; a sizeable share previously worked in the broad public sector
- **Occupation:** the majority were previously employed in skilled trades, followed by elementary occupations.

Figure 3.8 Unemployment by age (Dublin), Q4 2015



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

Figure 3.9 Unemployment by education\* (Dublin), Q4 2015



\*Excludes not stated

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

Figure 3.10a PES job seekers (Dublin), April 2016

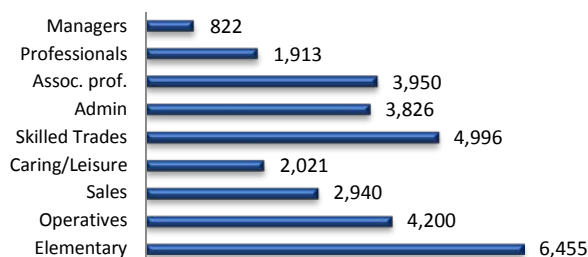
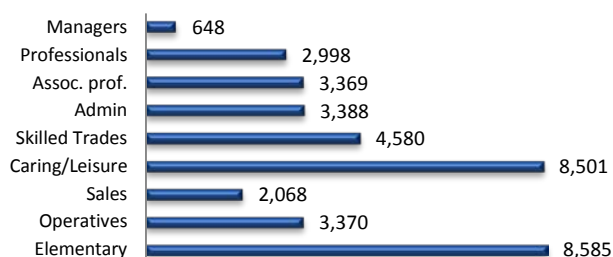


Figure 3.10b PES vacancies (Dublin), Jan-Dec 2015



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

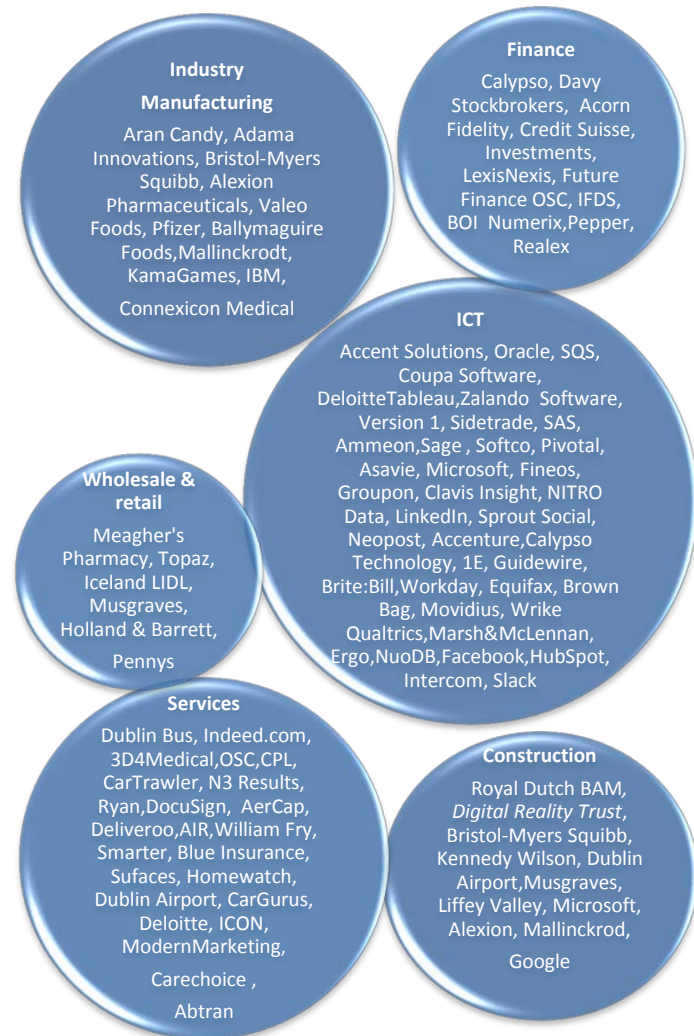
### Live Register, PES job seekers and vacancies

- In May 2016, there were approximately 74,700 persons on the Live Register in the region
- In April 2016, approximately 31,200 job ready job seekers were registered with the PES; just over a fifth of them had previously worked in elementary occupations, 16% in skilled trades, and 13% as operatives and about the same share as associate professionals
- In 2015, approximately 37,500 vacancies were advertised through DSP Jobs Ireland in the Dublin region; the highest number of vacancies was in elementary occupations (e.g. cleaners, security guards and catering staff) and caring (care workers), followed by skilled trades (mainly chefs, but also electricians, carpenters, mechanics), administrators (census enumerators), operatives (artic/HGV drivers) and associate professionals (mainly sales related).

### Employment growth and job creation

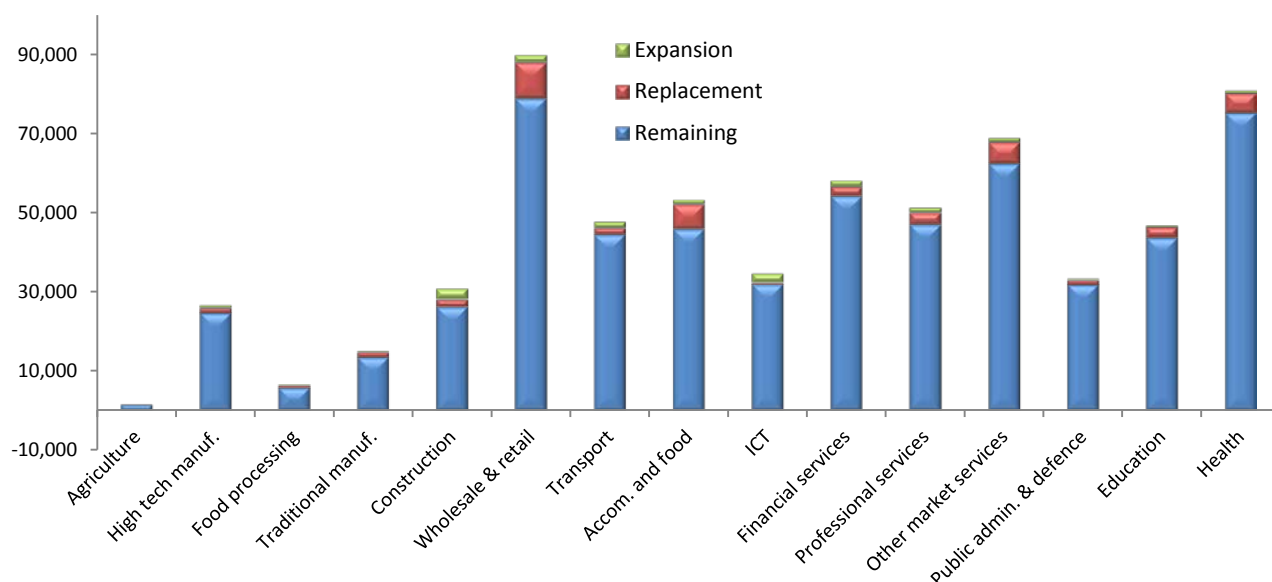
- Over the period Q4 2014 to Q4 2015 employment expanded by almost 4%; most notably, it grew in accommodation & food, industry, administrative services, information & communication, and to a lesser extent, in construction and wholesale & retail; it remained static in the public sector
- Over the period Q4 2010 to Q4 2015 employment increased by 10%, with expansion occurring in ICT, accommodation & food, professional services and construction
- Job announcements suggest that job opportunities will continue to arise in the ICT, industry, construction, wholesale & retail, and a range of services, including business and financial services
- Annual employment projections suggest that for each sector, replacement demand exceeds expansion demand, with the exception of construction and ICT, where the opposite is the case; the sectors characterised by particularly sizeable replacement demand are wholesale & retail, accommodation & food, as well as health and market services; in the short-term replacement demand for the region is estimated at almost 43,000, while expansion demand is projected at approximately 14,000. (Figure 3.12)

Figure 3.11 Job creation announcements (Dublin), 2015 & 2016



Source: Analysis by SOLAS (SLMRU), various sources

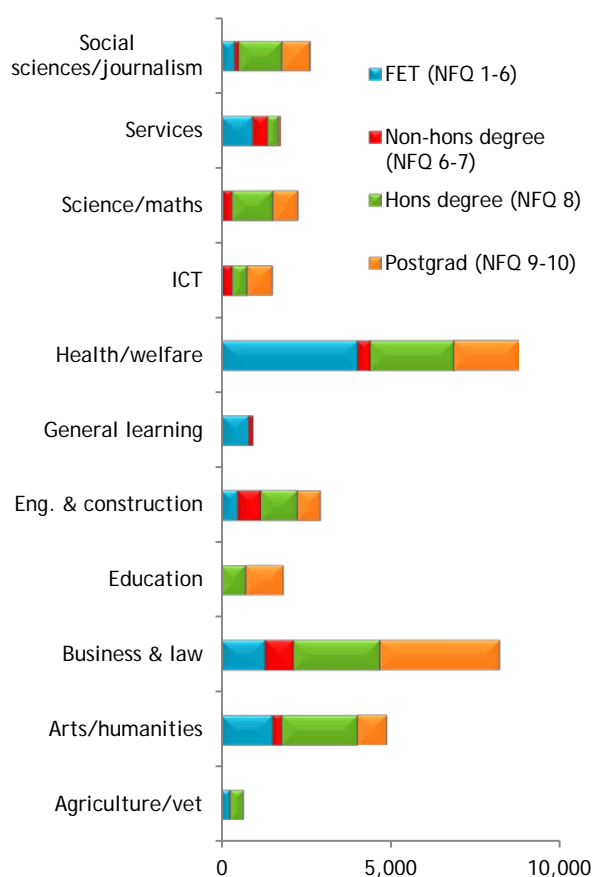
Figure 3.12 Employment projections by sector - annual projected recruitment requirement\*, Dublin



Source: SLMRU analysis; \* based on 2015 (annual average) employment figures



Figure 3.13 QQI/FET and HE awards (Dublin)



Source: QQI (FET major awards, 2015);  
HEA awards, 2014/2015

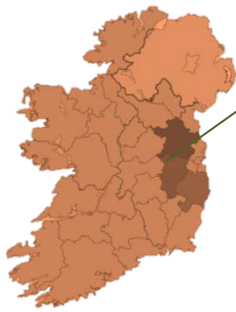
#### Education and training awards and education indicators (Dublin)

- Of the total of 36,500 awards (FET and HE) combined, the largest number were in health/welfare (almost a quarter), followed by business & law
- Of approximately 9,700 FET awards (NFQ 1-6), the largest share were in health/welfare (two fifths all FET awards), followed by arts & humanities (15%), and business & law (13%)
- Of almost 26,800 higher education awards, 26% were in business & law, 18% in health, 13% in arts & humanities, 9% in engineering & construction, 8% in science & maths, and 6% in ICT; at undergraduate (NFQ 6-8) level, totalling approximately 16,200 awards, the highest numbers were in business & law, health, and arts & humanities
- Postgraduate awards totalled 10,600; the highest numbers were in business & law and health; the number of ICT postgraduate awards marginally exceeded the number of awards at undergraduate level.

#### Education indicators, quarter 4 2015:

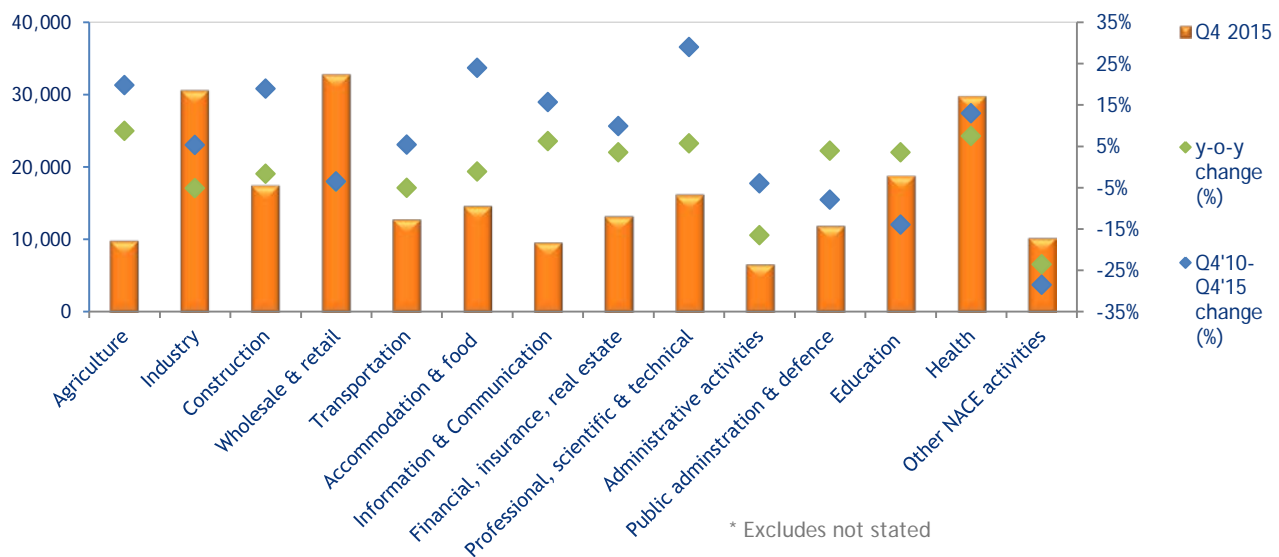
- Early leavers from education and training (18-24 years): 5.4%
- NEET (15-24 years): 9%
- Lifelong learning (25-64 years): 9.8%
- Tertiary educational attainment (30-34 years): 65%.

## 4. Mid-East



Population	552,600
Population - working age (15-64 years)	354,300
Labour force	255,100
Participation rate	61.5%
Employment	235,800
Employment rate (20-64 years)	71%
Unemployment	19,300
Unemployment rate	7.6%
GVA per person (€)	€24,276
GVA p.p. index (State = 100)	68.5

Figure 4.1 Employment by economic sector\* Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (Mid-East)



Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were 255,100 persons in labour force, a decrease of almost 5,000 y-o-y; the participation rate was 61.5%, about one percentage point lower than a year ago
- There were 235,800 persons in employment, marginally lower than in quarter 4 2014; the employment rate (20-64 years) was 71%; there were 14% persons in self-employment, of which almost three quarters had no employees
- Wholesale & retail was the largest sector of employment, followed by industry and health
- Knowledge intensive services (market, high tech and financial) accounted for 17% of employment; there were almost 10,000 persons, or 4%, in the information & communication sector.

Figure 4.2 Employment by economic sector (Mid-East), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

Figure 4.3 Employment by occupation\* (Mid-East), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

#### Employment by occupation

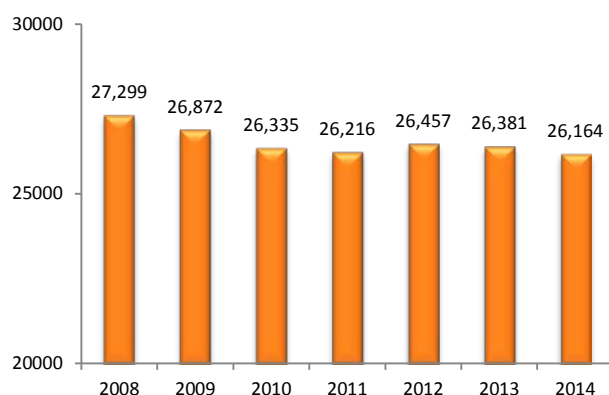
- In quarter 4 2015, professionals were the largest occupational group, totalling almost 46,000 persons, followed by skilled trades (totalling 35,200, of which one fifth were farmers), and associate professional & technical occupations, amounting to 33,700
- There were 24,500 managers, directors and senior officials working in the region, while 23,300 were in administrative occupations
- Approximately 18,300 persons were employed in caring, leisure and other personal services occupations and an almost identical number were employed in sales and customer services occupations.

#### Employment by occupation and sector

- In quarter 4 2015, 25% of all managers & directors were employed in wholesale & retail, 15% were employed in industry, 13% were in the public sector (comprising health, education, and public admin. & defence) and 10% were in construction
- 58% of all professionals in the region were employed in the public sector where this occupation accounted for 44% of total employment in the sector; 15% were employed in professional services, where they comprised 42% of the sector's total
- Associate professionals were also most likely to be employed in the public sector - almost a quarter worked there; almost a fifth of them were in industry, while about one-in-eight were in wholesale & retail and information & communication respectively
- Approximately one fifth of all employed in administrative occupations were in financial services, while almost a third were in the public sector
- A quarter of all engaged in skilled trades were based in construction, a fifth in industry, while 22% were in agriculture (farmers), where they accounted for 80% of sectoral employment
- Almost two thirds of all working in caring & personal services occupations were in the public sector, where they accounted for a fifth of total employment
- The largest share of operatives were employed in transport (two-in-five), followed by industry, which provided employment for one third of them
- One third of elementary occupations were in accommodation & food services, where they comprised almost a half of total employment
- Within occupational groups, the highest employment was found in the following occupations:
  - Managers: Production managers and directors
  - Professionals: teachers (secondary & primary), nurses & midwives, accountants
  - Associate professionals: business sales executives and sales accounts / business development managers
  - Admin/secretarial: mainly admin occupations in the public sector and bank & post office clerks
  - Skilled trades: farmers, chefs, metal working production and maintenance fitters
  - Services: care workers & home carers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants, cashiers and checkout operators
  - Operatives: drivers - large goods vehicle drivers
  - Elementary: kitchen & catering assistants and waiters and waitresses.



Figure 4.4 Active enterprises: Business Economy (Mid-East)



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

#### Active enterprises

- In 2014, there were almost 26,200 active enterprises in the Mid-East region; this was a decline of 1% compared to 2013
- Compared to the 2008 level, the number of active enterprises declined by just over 1,100, or 4%
- Construction and wholesale & retail had the largest share of active enterprises, at 23% and 18% respectively; there were approximately 4,250 enterprises in professionals services (16% of the total)
- There were approximately 1,450 enterprises (5.5% of the total) in information & communication; across the regions, this was the second highest share of enterprises in this sector
- 93.6% were micro enterprises, accounting for two fifths of all persons engaged in the business economy; large enterprises accounted for almost a fifth.

#### Regional economic output (GVA), Mid-East, 2013

- Economic output in 2013 amounted to just above €12.95 billion, translating into €24,276 per person
- In relative terms (State = 100) the GVA index was 68.5
- The region accounted for 7.9% of the State's economic output.

#### Medium to large enterprises by sector (2015)

- Outside the public sector, the highest number of medium to large enterprises (employing 50 persons or more) in the Mid-East region in 2014 was found in industry, followed by wholesale & retail, accommodation & food services, ICT and administrative services
- Within industry, the largest companies were in manufacturing; while there were relatively large companies in all main segments, they were concentrated in computer, electronic & optical, food & beverage, and chemicals
- Within wholesale & retail the largest companies were in general retail, with a strong presence of specialised wholesalers (e.g. of high tech products)
- Security and investigation activities were the largest employers in administrative & support activities
- Within accommodation & food services, hotels were the largest employers
- In information & communication, the largest enterprises were in publishing and IT consultancy.

Figure 4.5 Sectors with largest enterprises, Mid-East, 2015



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

Figure 4.6a Industrial units (Mid-East)

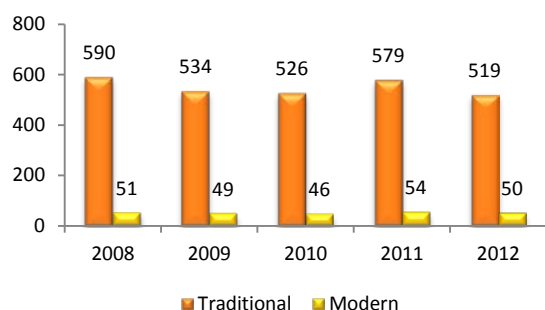
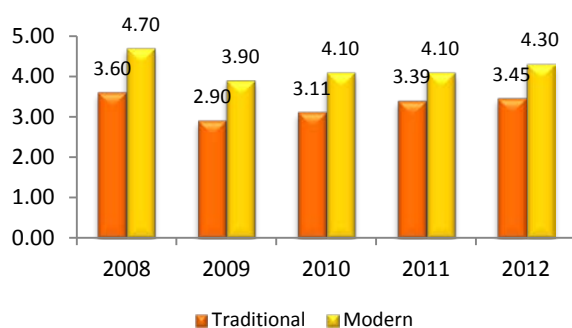


Figure 4.6b Gross output in industrial units (Mid-East), € billion



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

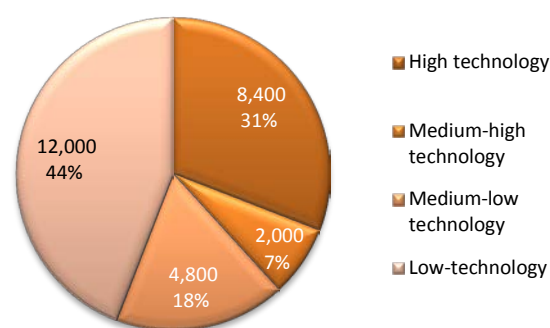
#### Industrial activity

- In 2012, 91% of all industrial units in the Mid-East region were in the traditional sector, accounting for 62% of all persons engaged
- Over the period 2011-2012, the number of industrial units decreased from 633 to 569; the number of units declined in both sectors (modern and traditional); the value of gross output increased year-on-year, with increases observed in both sectors; the modern sector produced 55.5% of the gross industrial output value in 2012
- Over the period 2008-2012, the number of persons engaged declined by approximately 4,800 or by one fifth, with both traditional and modern segments contracting by a similar magnitude
- In 2012, there were 10,200 persons engaged in SMEs, amounting to 52%; SMEs accounted for 40% of the output. In 2012, there were approximately 9,800 persons engaged in foreign owned industrial units, the identical number as in the Irish owned; however, the value of gross output produced in the foreign units was €5,553 million (or 72%), compared to €2,204 million produced in the Irish owned units
- Three quarters of gross output in 2012 was exported
- Within manufacturing alone, in 2012, those working in exporting units outnumbered those in non-exporting - the former amounted to approximately 15,500 persons, the latter to approximately 4,100; the number of persons engaged declined in relation to 2009 in both exporting and non-exporting units.

#### Manufacturing employment

- In quarter 4 2015, just above 27,000 persons in the Mid-East region were employed in manufacturing
- 31% were employed in the high tech segment (manufacture of pharmaceutical products and computer, electronic & optical products)
- 12,000 persons, or 44% were employed in low-tech manufacturing (mostly in food processing, printing, and furniture)
- Combined, a quarter of all were employed in either medium-low tech manufacturing or medium-high tech manufacturing (e.g. fabricated metal products).

Figure 4.7 Manufacturing employment (Mid-East), Q4 2015



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

## Unemployment

- In quarter 4 2015, there were 19,300 unemployed persons in the Mid-East region; of those, 50% were long-term unemployed (the long term unemployment rate was 3.6%); a fifth reported no previous experience of employment
- Age:** a quarter were either aged 25-34 or aged 45-54, while just above a fifth were aged 35-44; those aged under 25 comprised 18% of all unemployed persons in the region, while the youth unemployment rate was 17% and the youth unemployment ratio was 5.3%
- Education:** almost a quarter of unemployed had achieved at most lower secondary, while above a third had upper secondary; 26% had some third level, while 14% had some FET education
- Sector:** those previously employed in industry accounted for the largest share of unemployed in the Mid-East (with previous or stated employment experience), followed by those who previously worked in construction and in wholesale and retail
- Occupation:** the majority were previously employed in elementary occupations (over a quarter), followed by skilled trades, administrative and sales related occupations.

Figure 4.8 Unemployment by age (Mid-East), Q4 2015

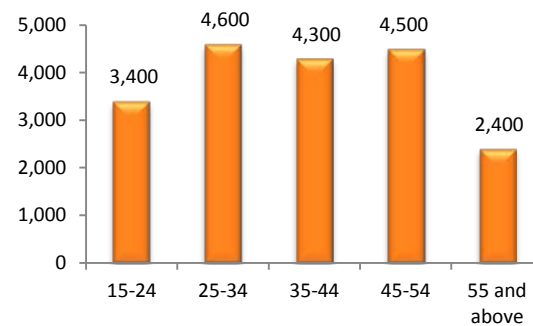
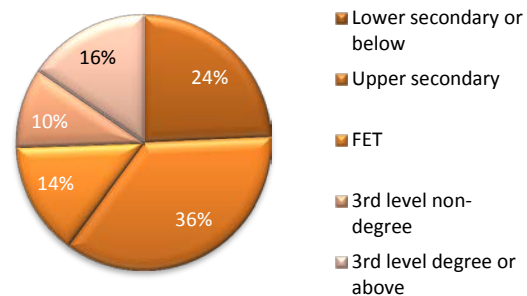


Figure 4.9 Unemployment by education\* (Mid-East), Q4 2015



\*Excludes not stated

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

Figure 4.10a PES job seekers (Mid-East), April 2016

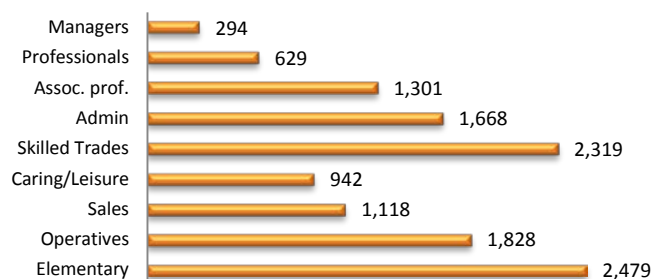
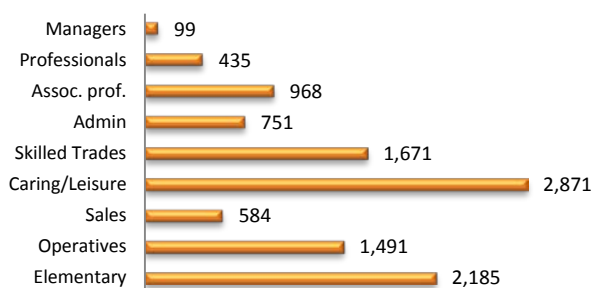


Figure 4.10b PES vacancies (Mid-East), Jan-Dec 2015



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

## Live Register, PES job seekers and vacancies

- In May 2016, there were approximately 29,900 persons on the Live Register in the Mid-East region
- In April 2016, approximately 12,600 job ready job seekers were registered with the PES; one fifth of them had previously worked in elementary occupations, 18% in skilled trades, 15% as operatives and 13% were in administrative occupations
- In 2015, over 11,000 vacancies were advertised through DSP Jobs Ireland in the Mid-East region; the highest number of vacancies was in caring (care workers) and elementary occupations (e.g. warehouse operatives, catering staff, cleaners, security guards), followed by skilled trades (e.g. chefs, electricians, butchers, carpenters) and operatives (process operatives, HGV drivers).

### Employment growth and job creation

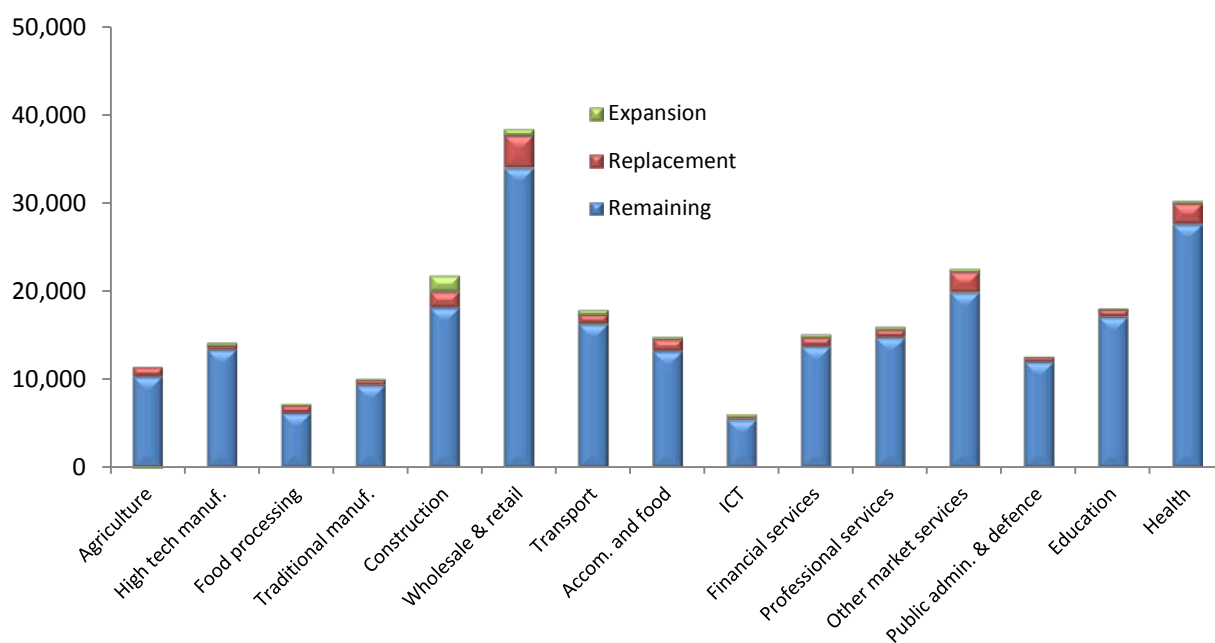
- Over the period quarter 4 2014 to quarter 4 2015, employment contracted marginally in the region; with regard to the sectoral picture, employment expanded in the health sector, while it either remained static or contracted in other sectors
- Over the period quarter 4 2010 to quarter 4 2015, employment increased by 4%; over this five year period, growth was particularly strong (in relative terms) in professional services, health & social work, accommodation & food, and construction
- Recent job announcements suggest that, over the short to medium term, job opportunities will arise in industry (in both low and high technology manufacturing), ICT, wholesale & retail, construction, and in a range of business services
- In the short-term, it is projected that replacement demand will exceed expansion demand in all sectors (with the exception of construction, where these two components of total recruitment requirement are expected to be identical); replacement demand for the region is estimated to be almost 19,000, while expansion demand is estimated at 5,500. (Figure 4.12)

Figure 4.11 Job creation announcements (Mid-East), 2015 & 2016



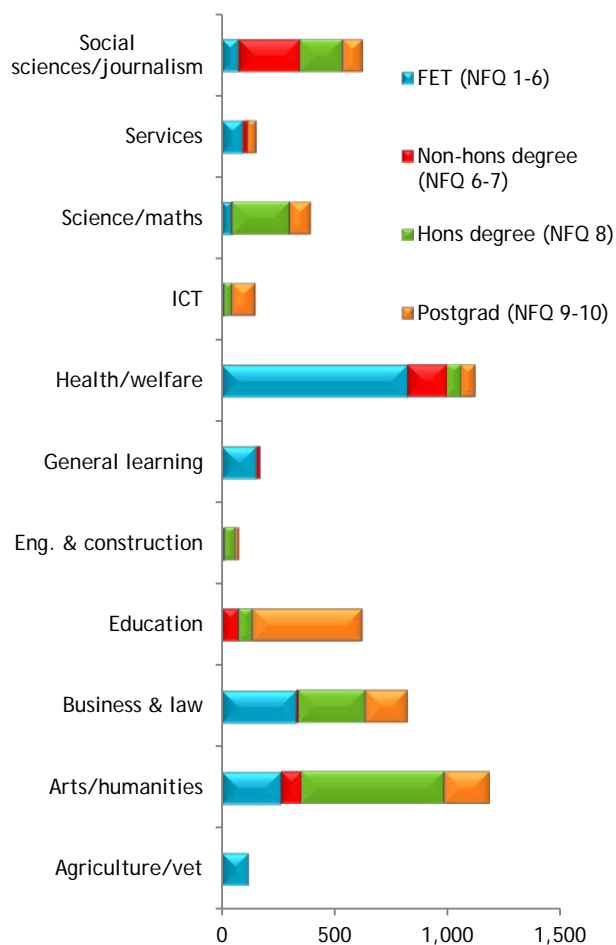
Source: Analysis by SOLAS (SLMRU), various sources

Figure 4.12 Employment projections by sector - annual recruitment requirement\*, Mid-East



Source: SLMRU analysis; \* annual projections are based on 2015 (annual average) employment figures

Figure 4.13 QQI/ FET and HE awards (Mid-East)



Source: QQI (FET major awards, 2015);

HEA (HE awards, 2014/2015)

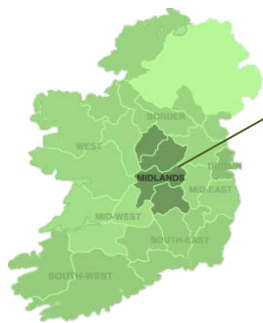
#### Education and training awards and education indicators (Mid-East)

- Of the total of approximately 5,400 awards, the largest numbers were in arts/humanities and in health/welfare (over a fifth in each); 15% were in business & law while education and social sciences/journalism each accounted for approximately one-in-ten of awards
- There were 1,900 QQI/FET awards (NFQ 1-6), which was the lowest number of all regions, resulting in the Mid-East accounting for only 6% of all QQI/FET awards in the State; of these, the largest numbers were in health/welfare (43%, the highest relative share of all regions), followed by business & law (17%), and arts & humanities (14%)
- Of the 3,500 higher education (NFQ 6-10) awards, the largest numbers were in arts & humanities (26%), followed by education (18%), and social sciences/journalism (16%); of all the regions, the Mid-East had the highest shares of both arts/humanities and social sciences/journalism awards; ICT awards comprised 4%, which was the lowest share of all regions
- Regarding postgraduate awards, the largest numbers were in education (38%), arts & humanities (16%), and business & law (15%).

#### Education indicators - quarter 4 2015:

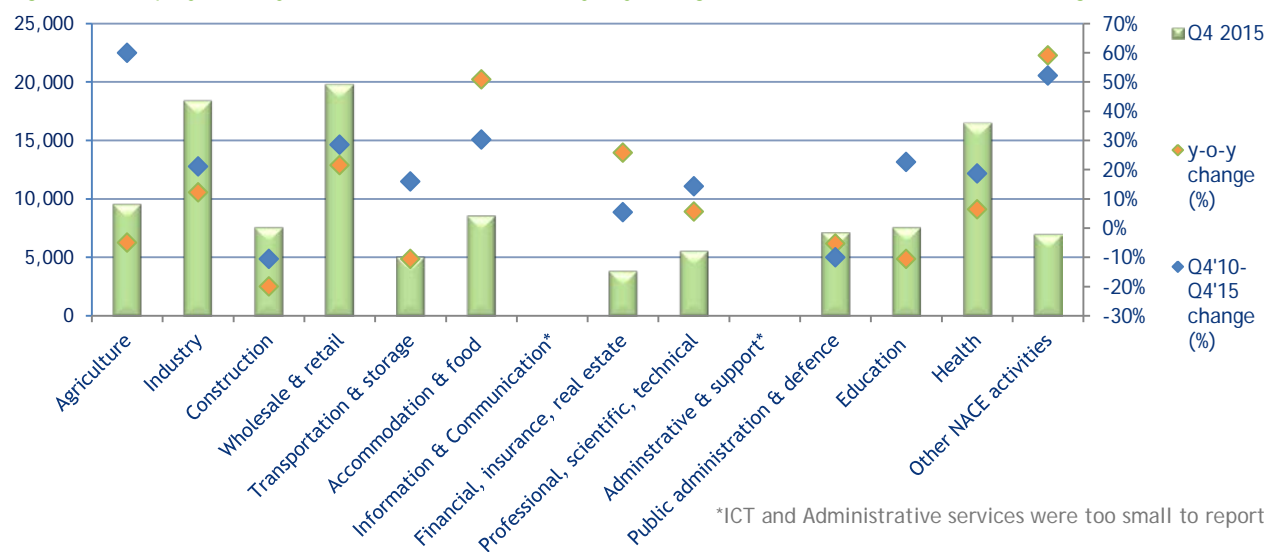
- Early leavers from education and training (18-24 years): 5.7%
- NEET (15-24 years): 14%
- Lifelong learning (25-64 years): 5.1%
- Tertiary educational attainment (30-34 years): 51%.

## 5. Midland



Population	293,600
Working age (15-64)	187,900
Labour Force	135,400
Employment	120,800
Unemployment	14,700
Participation Rate	60.3%
Employment Rate (20-64)	68.2%
Unemployment Rate	10.9%
GVA per person (€)	€20,923
GVA p.p. index (State = 100)	59.0

Figure 5.1 Employment by economic sector Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (Midland)

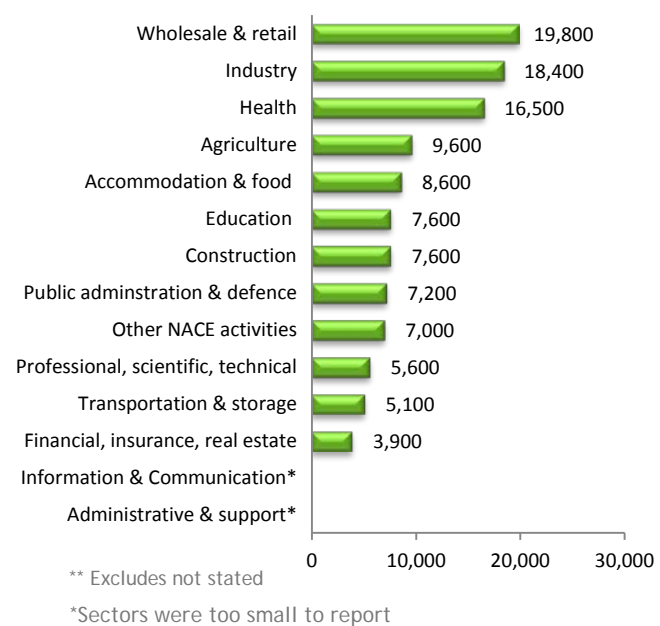


Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were 135,400 persons in the labour force, an increase of 3% y-o-y; the participation rate was 60%, which was almost one percentage point higher than a year ago
- There were 120,800 persons in employment, 7,000 more than a year ago and 17,500 more than five years previously; the employment rate (20-64 years) was 68%; 15% were self-employed, almost two thirds of whom had no employees
- Wholesale & retail was the largest sector of employment, followed by industry
- Knowledge intensive services (market, high tech and financial) accounted for 10% of employment.

Figure 5.2 Employment by economic sector\*\* (Midland), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 5.3 Employment by occupation\* (Midland), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

### Employment by occupation

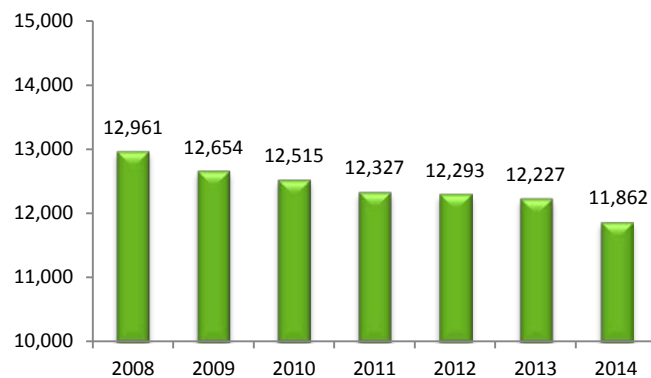
- In quarter 4 2015, there were almost 23,000 persons employed in skilled trades, accounting for almost one fifth of total employment in the region; within this broad occupation, farmers accounted for one third
- Almost 17,000 persons were employed in professional occupations, while 12,400 were employed in associate professional and technical occupations
- There were 13,700 persons employed in caring, leisure and related occupations, while 11,100 were in sales & customer service roles; both of these occupations expanded relatively strongly year-on-year
- There were 12,000 persons employed as operatives, while there were 10,300 in administrative/secretarial occupations.

### Employment by occupation and sector

- In quarter 4 2015, almost a quarter of managers were in accommodation & food services (proprietors) where they comprised a fifth of sectoral employment; two fifths were in wholesale & retail
  - Three fifths of professionals worked in the public sector (public admin. & defence, health and education combined), where they accounted for a third of sectoral employment
  - Two fifths of associate professionals were in the public sector, and one fifth were in industry
  - Over a third of those in administrative occupations were in the public sector and accounted for one-in-eight of all employed in the sector; almost a fifth worked in financial services, where they accounted for almost a half of sectoral employment
  - One third of those in skilled trades were in agriculture (consistent with the finding that farmers accounted for one third of the total); over a fifth were in industry, the majority in low and medium-low tech manufacturing; 15% of those in skilled trades worked in construction, comprising almost a half of sectoral employment
  - Just over two thirds of persons in caring, leisure & related services occupations worked in the public sector (mostly health, where they accounted for almost a half of employment in the sector)
  - Over a half of operatives were in industry, where they accounted for over a third of sectoral employment;
- over a fifth were in transport (drivers) where they accounted for a half of sectoral employment
  - One third of elementary occupations were in accommodation & food services, where they accounted for just over a half of sectoral employment
  - Within occupational groups, the highest employment was found in the following occupations:
    - Managers: functional managers & directors, shopkeepers & proprietors
    - Professionals: teachers (secondary & primary), nurses & midwives, accountants
    - Associate professionals: business sales executives and sales accounts/business development managers, police officers
    - Admin/secretarial: mainly generic and bank clerks
    - Skilled trades: farmers, chefs, metal working production and maintenance fitters, electricians
    - Services: care workers & home carers, child-minders, hairdressers, barbers, beauticians & related occupations
    - Sales: retail sales assistants, cashiers and checkout operators
    - Operatives: drivers - large goods vehicle drivers, food & beverage process operatives
    - Elementary: kitchen & catering assistants, bar and waiting staff.



Figure 5.4 Active enterprises: Business Economy (Midland)



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

#### Active enterprises

- In 2014, there were approximately 11,900 active enterprises in the Midland region
- Over the period 2008 to 2014, the number of active enterprises declined by 1,100, with the period 2009-2011 accounting for most of decline; construction was particularly adversely affected - the sector lost a fifth of its enterprises (1,000) over the period
- Nevertheless, construction accounted for 25% of active enterprises in the region in 2014, wholesale & retail for 23%, professional activities for 12%, while manufacturing and accommodation & food each accounted for 8% of all active enterprises
- 93.4% of enterprises were micro enterprises, the largest share of all regions; micro enterprises accounted for 45% of all persons engaged in the business economy in the region.

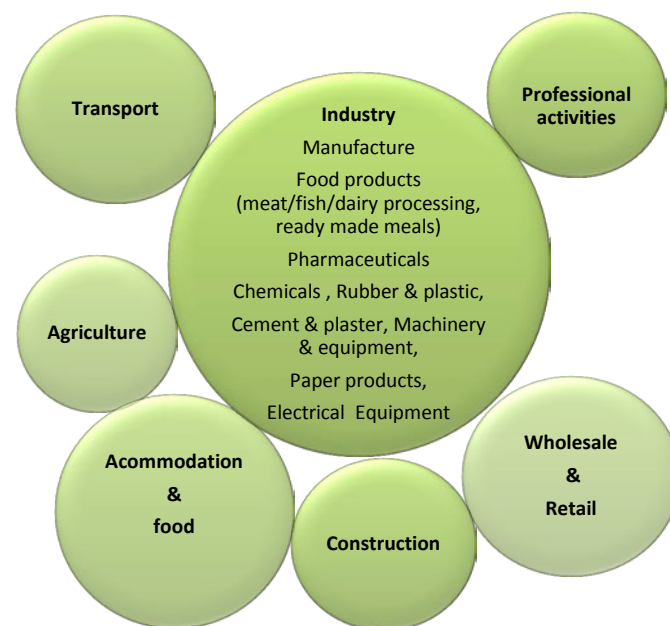
#### Regional economic output (GVA), 2013 (Midland)

- Economic output in 2013 amounted to €5.9 billion, translating into €20,923 per person
- In relative terms (State =100) the GVA index was 59.0
- The region accounted for 3.6% of the State's economic output.

#### Medium to large enterprises by sector (2015)

- Of all regions, the Midland region had the smallest number of relatively large enterprises (employing at least 50 persons)
- The highest number of medium to large enterprises in the Midland region, outside the public sector was found in industry, followed by wholesale & retail, and accommodation & food services
- Within industry, the largest companies were mostly in manufacturing, namely in food processing, and the manufacture of rubber & plastics/plastic products
- Enterprises engaged in general retail were the largest in the wholesale & retail sector
- Hotels were the largest companies in accommodation & food services
- Within professional activities, the biggest companies were in accounting and related activities.

Figure 5.5 Sectors with largest enterprises (Midland), 2015



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

Figure 5.6a Industrial units (Midland)

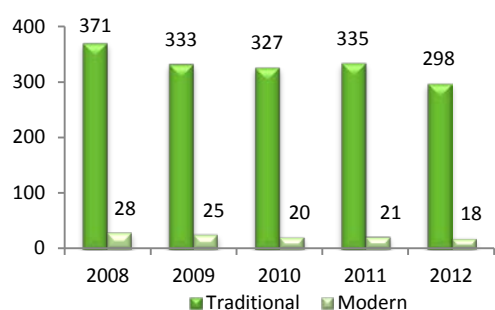
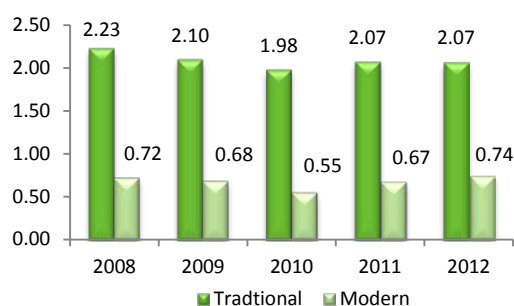


Figure 5.6b Gross output in industrial units (Midland), (€ billion)



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

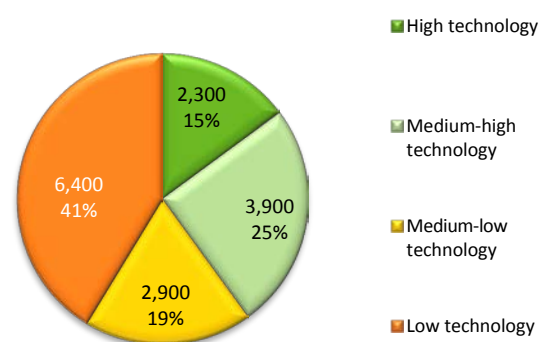
#### Industrial activity

- In 2012, 94% of all industrial units (manufacturing, energy and utilities) in the Midland region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased from 356 to 316; the number of units declined in both sectors; the value of gross output increased by over 2%; the modern sector (which grew by 10%) accounted for the entire increase, since the traditional sector remained static
- Over the period 2008-2012, the number of persons engaged declined by approximately 3,300 or by one quarter; as result, there were approximately 10,300 persons engaged in industry in 2012; approximately 3,200 were in foreign owned units, and 7,100 in Irish owned units
- In 2012, there were approximately 6,600 persons engaged in SMEs, amounting to 64% of all persons engaged; SMEs accounted for 77% of industrial gross output - this was the second highest share across all regions
- In 2012, the share of industrial output exported was 53.7%; this was the lowest share of all regions
- The value of gross output produced in foreign owned industrial units was €1,159 million, the lowest value of all regions
- Within manufacturing activities alone, in 2012, there were 7,000 persons engaged in exporting manufacturing units; 3,300 were engaged in non-exporting units.

#### Manufacturing employment

- In quarter 4 2015, approximately 15,500 persons in the Midland region were employed in manufacturing
- High tech sector manufacturing employment comprised 15% of the total
- Medium-high tech manufacturing (mostly manufacture of machinery and equipment) accounted for a quarter of total manufacturing employment
- Medium-low tech manufacturing accounted for about one fifth of the total
- Low technology manufacturing accounted for about two fifths of total manufacturing employment; manufacture of food & beverages accounted for almost a half of the low-tech segment (and a fifth of total regional manufacturing employment).

Figure 5.7 Manufacturing employment (Midland), Q4 2015



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

## Unemployment

- In quarter 4 2015, there were approximately 14,700 unemployed persons in the region, a y-o-y decline of 10%; it is estimated that the number of unemployed has declined by about a third in relation to five years previously; one half of those unemployed were seeking a job for at least 12 months (the long term unemployment rate was 5.3%); almost one third have never been in employment
- **Age:** those aged 15-24 (and those aged 45 and above) accounted for just over a quarter of all unemployed; the youth unemployment rate was 28%; the youth unemployment ratio was 10%
- **Education:** a quarter of those unemployed in the region had attained at most lower secondary education, which was almost the same as the share of those with a technical or vocational qualification, including an advanced certificate or completed apprenticeship (FET); almost a quarter had some third level education
- **Sector:** those previously employed in construction accounted for the largest share of unemployed, followed by those who had worked in wholesale & retail
- **Occupation:** those previously employed in skilled trades accounted for the largest share.

Figure 5.8 Unemployment by age (Midland) Q4 2015

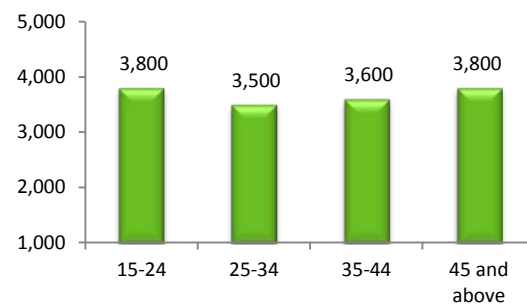
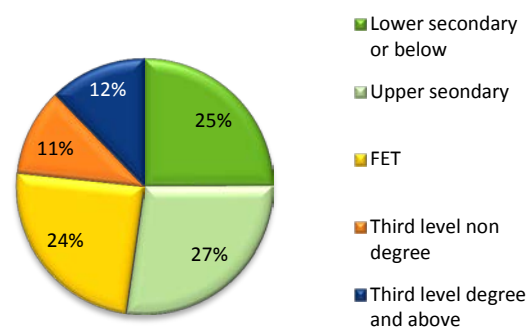


Figure 5.9 Unemployment by education\*, (Midland) Q4 2015



\*Excludes not stated

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

Figure 5.10a PES job seekers (Midland), April 2016

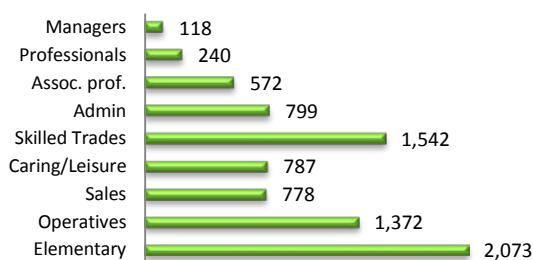
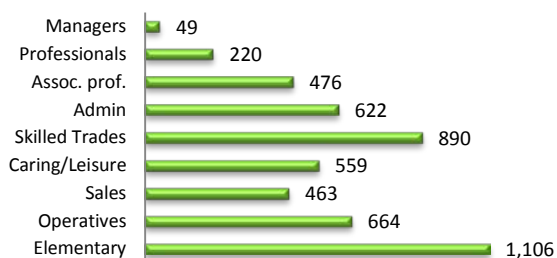


Figure 5.10b PES vacancies (Midland), Jan-Dec 2015



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

## Live Register, PES job seekers and vacancies

- In May 2016, there were approximately 25,400 persons on the Live Register in the region
- In April 2016, approximately 8,300 job seekers were registered with the PES; 25% of them had previously worked in elementary occupations, 19% in skilled trades, 17% as operatives, 10% were in administrative occupations and about the same share in caring/personal services and in sales occupations
- In 2015, over 5,000 vacancies were advertised through DSP Jobs Ireland in the Midland region; the highest number of vacancies was in elementary occupations (e.g. security guards, catering staff) and skilled trades (e.g. chefs, electricians, painters) followed by operatives (process operatives, HGV drivers), administrators (census enumerators) and caring (care workers).

**Employment growth and job creation**

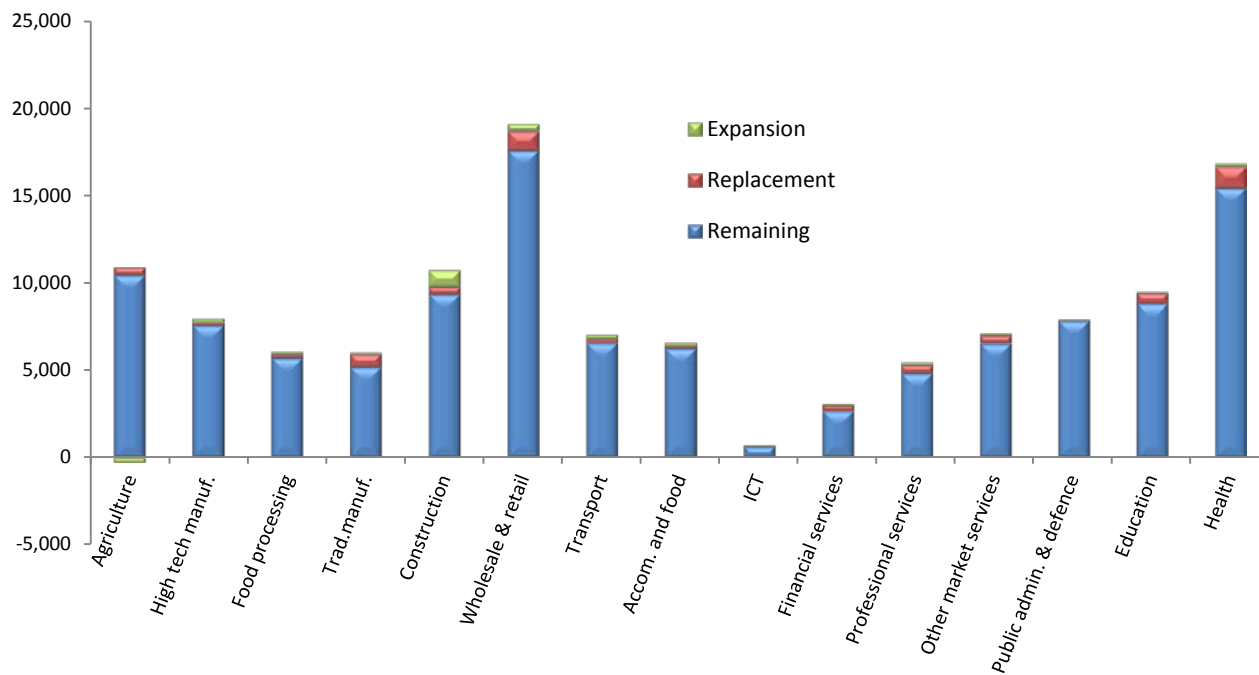
- Over the period Q4 2014 to Q4 2015 the number of persons in employment grew by approximately 7,000 (6%); wholesale & retail, accommodation & food, and industry accounted for most of the expansion that occurred year-on-year
- Over the five-year period Q4 2010 to Q4 2015 employment increased by 17%; it expanded in agriculture, industry, wholesale & retail, health and accommodation & food
- Job announcements suggest that job opportunities will continue to arise, most notably in industry and in a range of business services
- Annual employment projections suggest that, in the short-term, for each sector, replacement demand exceeds expansion demand, with the exception of construction, where the opposite is projected to be the case. (Figure 5.12)

Figure 5.11 Job creation announcements (Midland), 2015 & 2016



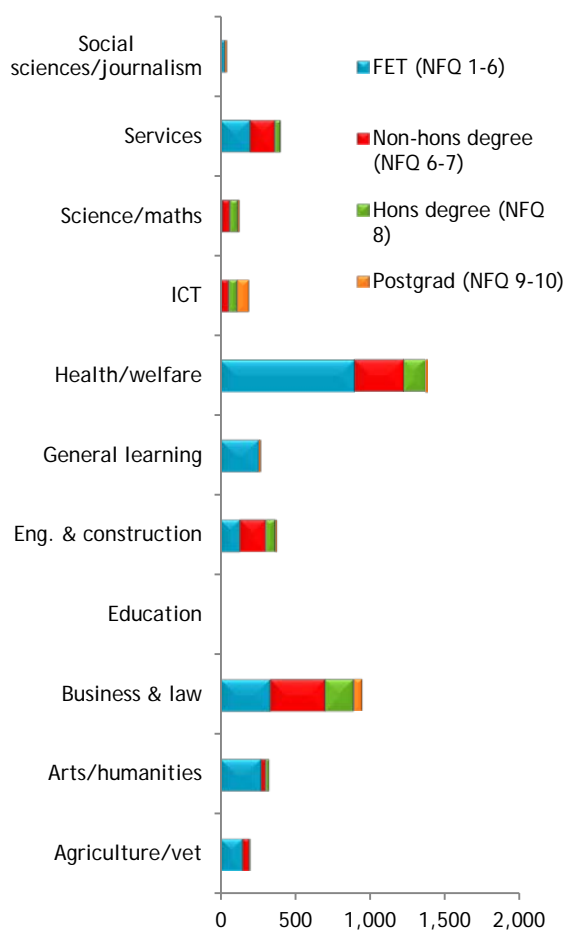
Source: Analysis by SOLAS (SLMRU), various sources

Figure 5.12 Employment projections by sector - projected annual recruitment requirement\* Midland



Source: SLMRU analysis;\* based on 2015 (annual average) employment figures

Figure 5.13 QQI/FET and HE awards (Midland)



Source: QQI (FET major awards, 2015),  
HEA (HE awards, 2014/2015)

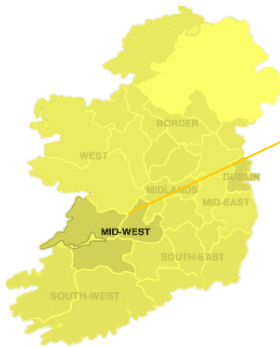
#### Education and training awards and education indicators (Midland)

- Of the total of approximately 4,200 awards (NFQ 1-10), the largest numbers were in health/welfare (a third) and business & law (over a fifth)
- Of 2,250 QQI/FET awards (NFQ 1-6), most were in health/welfare (two fifths); 15% were in business & law, 12% in arts/humanities, 11% in general learning and 9% in services
- Higher education awards (totalling approximately 2,000) were mostly in business & law (a third), followed by health/welfare (a quarter); engineering & construction accounted for 12%, and ICT for 9%
- Regarding postgraduate awards, they were mostly in ICT (41%) and business & law (27%).

#### Education indicators - quarter 4 2015

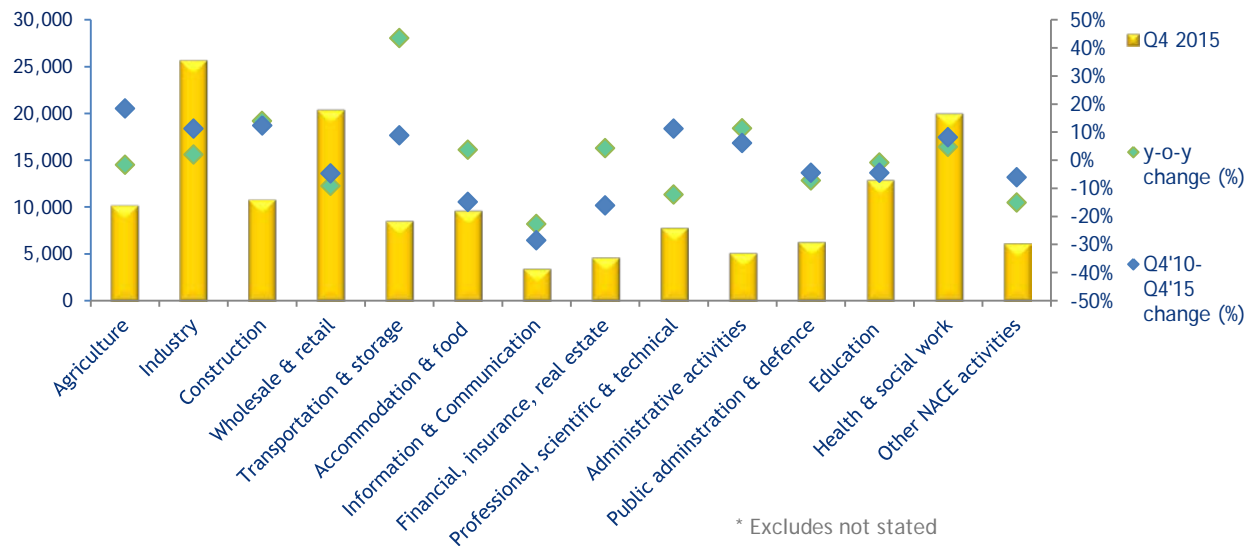
- Early leavers from education and training (18-24 years): 8%
- NEET (15-24 years): 19%
- Lifelong Learning (25-64 years): 6.3%
- Tertiary educational attainment (30-34 years): 48%

## 6. Mid-West



Population	376,400
Population (15-64 years)	238,500
Labour Force	167,100
Participation Rate	57.1%
Employment	153,100
Employment Rate (20-64 years)	67.8%
Unemployment	14,100
Unemployment Rate	8.5%
GVA	€29,305
GVA p.p. index (State = 100)	82.6

Figure 6.1 Employment by economic sector\* Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (Mid-West)

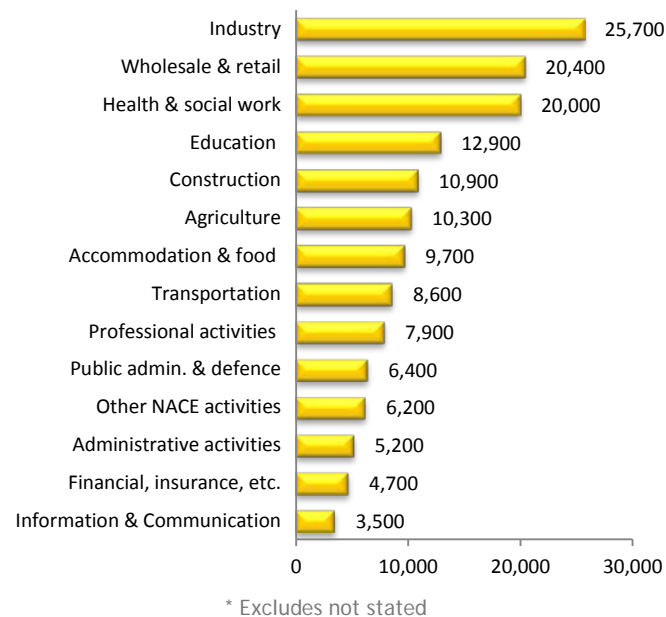


Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were approximately 167,000 persons in the labour force, a decrease of 2% y-o-y; the participation rate was 57%, somewhat lower than the rate observed a year previously; the labour force contracted by 8% in relation to Q4 2010, when the participation rate was 61%
- There were approximately 153,000 persons in employment, effectively unchanged from a year previously, and only marginally higher than in quarter 4 2010; the employment rate (20-64 years) was 67.8% in quarter 4 2015; self-employed accounted for 19% of employment
- Industry was the largest sector
- Knowledge intensive services (market, high tech and financial services) accounted for 12% of employment.

Figure 6.2 Employment by economic sector\* (Mid-West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 6.3 Employment by occupation\* (Mid-West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

#### Employment by occupation

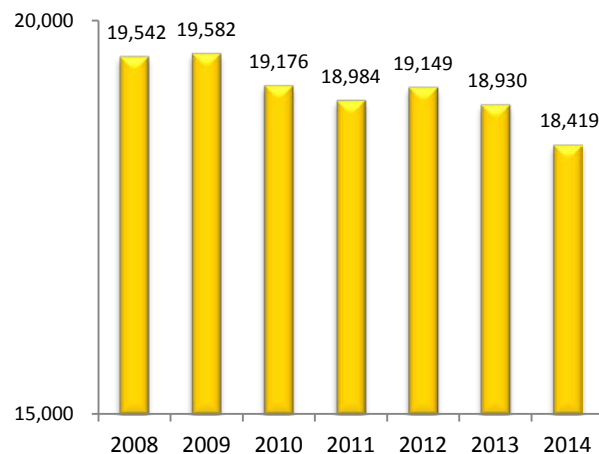
- In quarter 4 2015 skilled trades were the largest occupational group, totalling almost 31,000 persons and accounting for 20% of regional employment, followed by professionals, totalling 26,500
- There were approximately 12,700 persons in managerial and associated roles, with very similar numbers working in caring and related services, and in elementary occupations
- Administrative occupations totalled almost 15,500 and were the fourth largest occupational grouping
- It is estimated that, y-o-y, associate professionals expanded while sales/customer services and elementary occupations contracted.

#### Employment by occupation and sector

- In quarter 4 2015, a quarter of managers & directors were employed in wholesale & retail, while 17% were in industry; over a fifth were in accommodation & food, where they accounted for 28% of sectoral employment
- Three fifths of all professionals in the region were employed in the public sector; this occupation accounted for two fifths of all employed in this broad sector; 12% were working in industry where they accounted for 13% of sectoral employment
- Almost a quarter of associate professionals were working in industry; 22% of them were in the public sector, where they accounted for 10% of total employment in this broad sector
- Two fifths of those in administrative occupations were in the public sector
- One third of those classified as skilled trades were based in agriculture (farmers); a fifth were in construction, where they accounted for three fifths of sectoral employment; just under one fifth were in industry, where they accounted for just over a fifth of sectoral employment
- Seven-in-ten of all employed in caring & personnel services occupations were in the public sector, with health & social care accounting for the largest share
- The largest share of operatives were employed in industry (a half), where they accounted for a quarter of sectoral employment; one third were in transport
- one quarter of those in elementary occupations were in accommodation & food services, where they comprised a third of sectoral employment
- Within occupational groups, the highest employment was found in the following occupations:
  - Managers: functional managers & directors, shopkeepers & proprietors in wholesale & retail
  - Professionals: nurses & midwives, teachers (secondary & primary), accountants
  - Associate professionals: business sales executives, vocational & industrial trainers
  - Admin/secretarial: mainly general admin, PA and other secretaries
  - Skilled trades: farmers, metal working production & maintenance fitters, electricians
  - Services: care workers & home carers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants, cashiers and checkout operators
  - Operatives: drivers - large goods vehicle drivers, and routine operatives
  - Elementary: cleaners & domestics, elementary occupations in construction and storage.



Figure 6.4 Active enterprises: Business Economy (Mid-West)



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

#### Active enterprises

- There were approximately 18,400 active enterprises in the Mid-West region in 2014
- The number of active enterprises decreased in relation to 2008 by approximately 1,100 or 6%
- In 2014, just over a fifth operated in construction and the same share were in wholesale & retail; 14% were in professional activities
- 92.8% were micro enterprises, accounting for 36% of persons in employment in the business economy; conversely, only 0.2% were large enterprises, which accounted for a fifth of employment in the business economy.

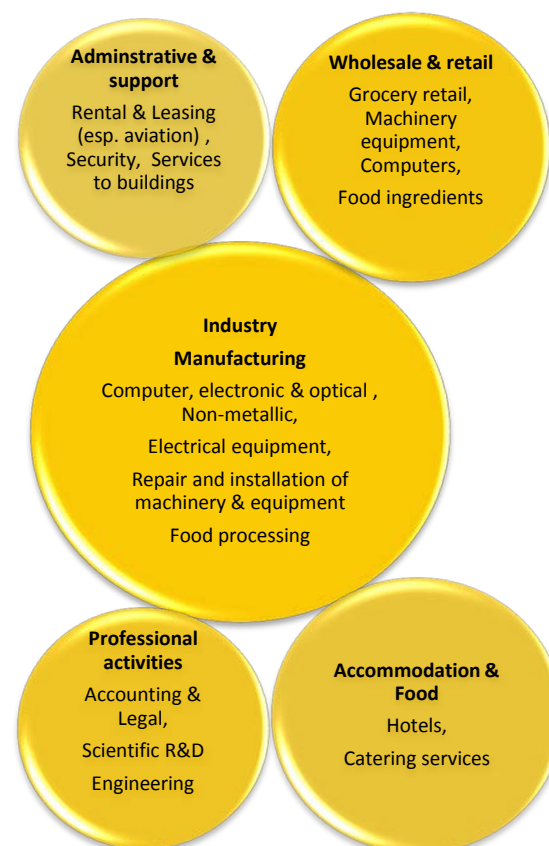
#### Regional economic output (GVA), 2013

- Economic output in 2013 amounted to € 11.2 billion, translation into €29,305 per person
- In relative terms (State = 100) the GVA index was 82.6
- The region accounted for 6.8 % of the State's economic output.

#### Medium to large enterprises by sector (2015)

- Outside the public sector, the highest number of medium to large enterprises (almost one quarter of all) in the Mid-West region was found in industry, followed by wholesale & retail, accommodation & food, professional services, and administrative/support services
- Within industry, the largest companies were in manufacturing, particularly in food processing; in addition, there were sizeable companies in computer, electronic and optical products manufacturing, electrical equipment, non-metallic products (e.g. specialised glass products, super materials, etc.), repair and installation of machinery & equipment
- Within wholesale & retail the largest companies were in general retail, with the presence of specialised wholesalers (e.g. food, computer & electronic components, mobile telephony, etc.)
- In professional services, the largest employers were in engineering and related technical consultancy (e.g. testing & analysis), in accounting & legal services and in scientific R&D
- Hotels and catering services were the largest enterprises in accommodation & food services.

Figure 6.5 Sectors with largest enterprises (Mid-West), 2015



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

Figure 6.6a Industrial units (Mid-West)

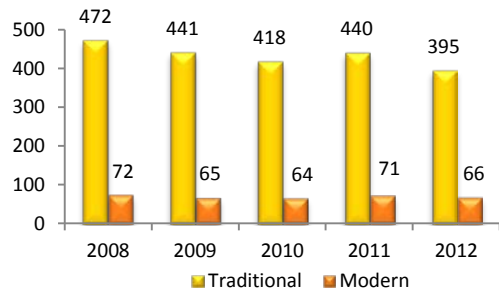
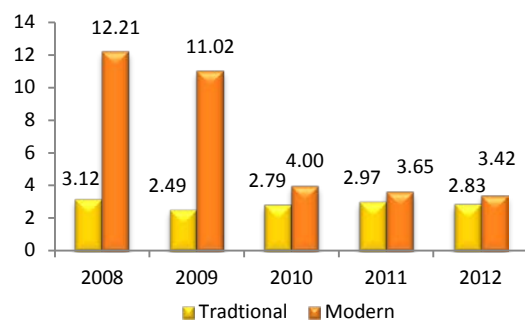


Figure 6.6b Gross output in industrial units (Mid-West), (€ billion)



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

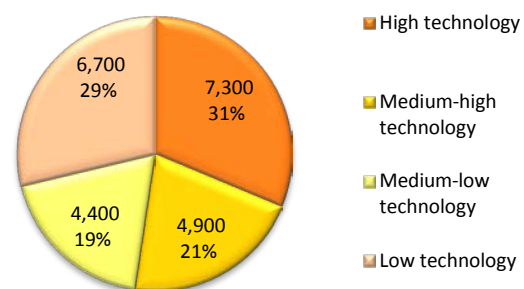
#### Manufacturing employment

- In quarter 4 2015, 23,200 persons in the Mid-West region were employed in manufacturing
- Almost a third of these were in high-tech-manufacturing activities (computer, electronic & optical, and, to a lesser extent in pharmaceutical)
- Medium-high tech manufacturing (mostly machinery and equipment) accounted for one fifth of manufacturing employment
- Medium-low tech manufacturing (comprising repair and installation of machinery and equipment, manufacture of fabricated metal products, manufacture of rubber and plastics and other manufacturing) accounted for 19%
- Low technology manufacturing accounted for 29%; within this segment, food & beverages accounted for more than a half.

#### Industrial activity

- In 2012, 86% of all industrial units (manufacturing, energy and utilities) in the Mid-West region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased by 10%; it declined in both sectors (modern and traditional); the value of gross output decreased by 6% in the modern sector and by 5% in the traditional sector
- Over the period 2008-2012, the number of persons engaged declined by 7,800 or by nearly a third; in 2012, there were approximately 17,300 persons engaged in industry - 11,000 (or 64%) of whom were in the traditional segment
- In 2012, there were 8,800 persons engaged in industrial units classified as SMEs, while 8,500 were in large units; SMEs accounted for less than a third of the region's industrial output
- The share of industrial output exported was 81.3%; this was above the average share for the State (77.2%)
- In 2012, the value of gross output produced in foreign owned industrial units was €4,730 million (accounting for 76% of industrial output)
- Within manufacturing activities alone, there were 13,800 persons engaged in exporting units in 2012, which was almost 3,000 fewer than in 2009; there were 3,500 persons engaged in non-exporting units, 900 fewer than in 2009.

Figure 6.7 Manufacturing employment (Mid-West), Q4 2015



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

## Unemployment

- In quarter 4 2015, there were approximately 14,100 unemployed persons in the region, 69% of whom were male; 17% of unemployed have never been in employment, the lowest share of all regions; 3-in-5 of those unemployed were seeking a job for at least 12 months; the long term unemployment rate was 5.3%
- Age:** those aged 25-34 were the largest group and accounted for a quarter of all unemployed; 15% were younger than 25; the youth unemployment rate was 20%, while the youth unemployment ratio was 5%
- Education:** 30% of those unemployed had attained at most lower secondary education, and the same share had upper secondary; 15% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship (i.e. FET); 25% had some third level education
- Sector:** those previously employed in construction and industry each accounted for the largest shares of unemployed
- Occupation:** the majority of unemployed persons were previously employed in elementary occupations and skilled trades.

Figure 6.8 Unemployment by age (Mid-West) Q4 2015

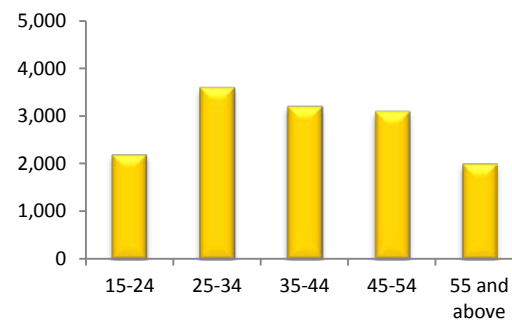
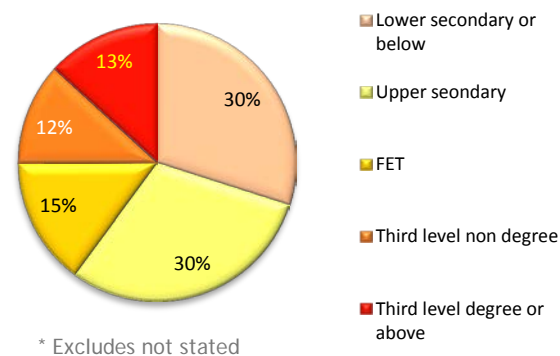


Figure 6.9 Unemployment by education\*, (Mid-West) Q4 2015



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

Figure 6.10a PES job seekers (Mid-West), April 2016

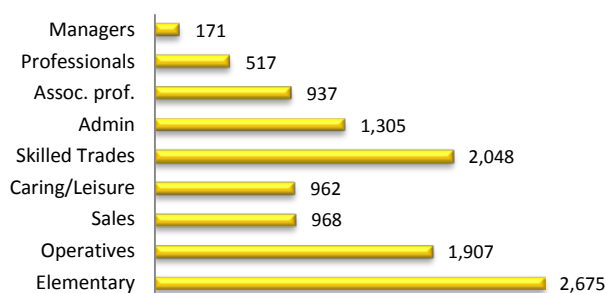
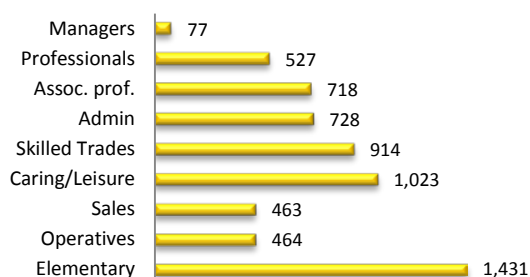


Figure 6.10b PES vacancies (Mid-West), Jan-Dec 2015



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

## Live Register, PES job seekers and vacancies

- In May 2016, approximately 25,300 persons were on the Live Register in the Mid-West region, a 10% decline year-on-year
- In April 2016 there were 11,500 job ready job seekers registered with the PES in the region; the highest number had previously worked in elementary occupations (construction, process, catering and security), followed by those who worked in skilled trades or as operatives; a considerable number also previously worked in various administrative roles (11%)
- In 2015, over 6,300 vacancies were advertised through DSP Jobs Ireland in the Mid-West region; the highest number of vacancies, almost a quarter of the total, was in elementary occupations (e.g. security guards, catering staff, cleaners), followed by caring (care workers), and skilled trades (e.g. chefs, electricians).

### Employment growth and job creation

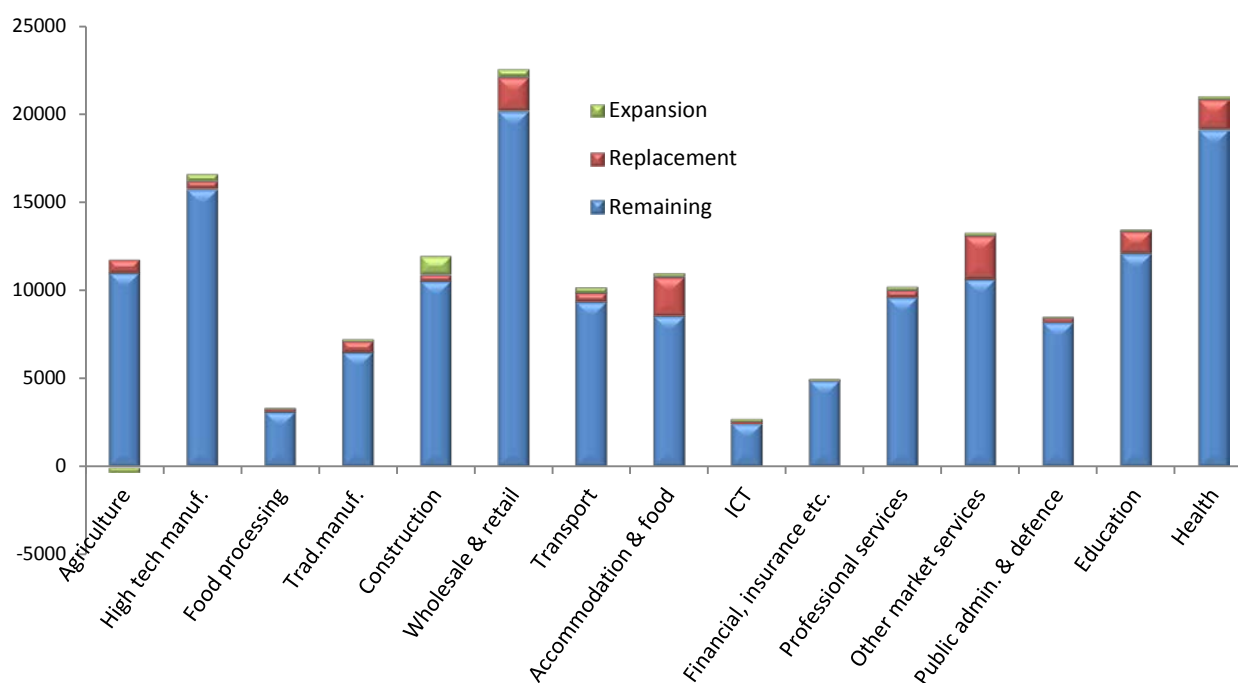
- Over the period quarter 4 2014 to quarter 4 2015, employment remained static overall; at sectoral level, construction, administrative services and transportation & storage increased
- Over the period Q4 2010 to Q4 2015 employment increased by 1%; it expanded in industry, construction, professional services and health
- Job announcements suggest that job opportunities will continue to arise in industry, construction, and a range of services, including business and financial services (e.g. financial services/software development linked with financial operations)
- Annual employment projections suggest that, in the short-term, for each sector, replacement demand exceeds expansion demand, with the exception of construction, where the opposite is the case; the sectors characterised by particularly sizeable replacement demand are accommodation & food, wholesale & retail, and health; in the short-term, replacement demand for the region is estimated at almost 14,000. (Figure 6.12)

Figure 6.11 Job announcements (Mid-West), 2015 & 2016



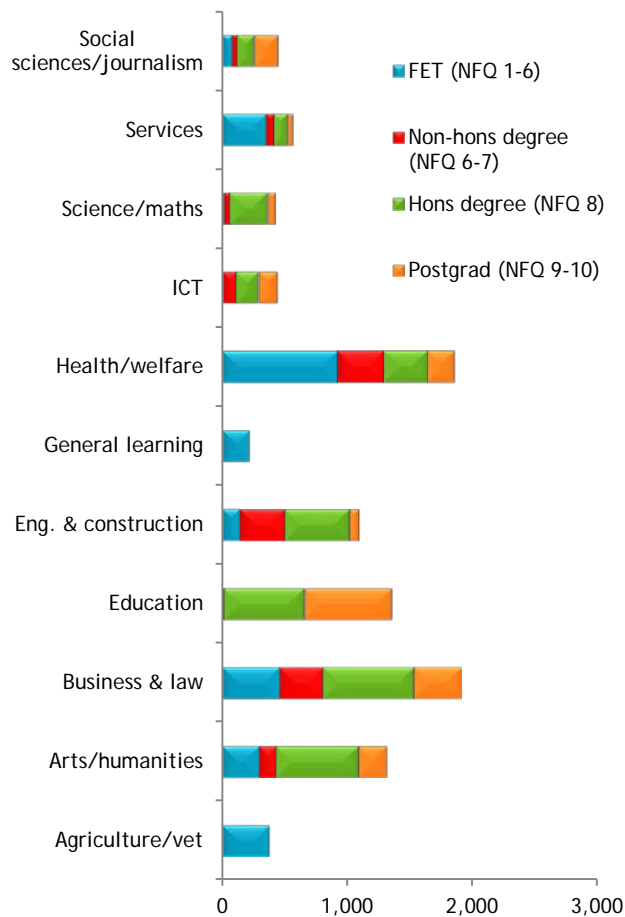
Source: Analysis by SOLAS (SLMRU), various sources

Figure 6.12 Employment projections by sector - annual projected recruitment requirement\*, Mid-West



Source: SLMRU analysis; \* based on 2015 (annual average) employment figures

Figure 6.13 FET and HE awards (Mid-West)



Source: QQI (FET major awards, 2015);  
HEA (HE awards, 2014/2015)

#### Education and training awards and education indicators (Mid-West)

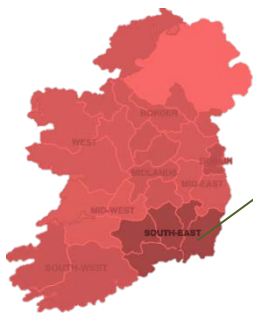
- Of the total of almost 10,000 awards (NFQ 1-10), the largest numbers were in business & law and health/welfare, accounting for a fifth each; education accounted for 14% of the total, while arts & humanities accounted for 13%
- Of 2,800 FET/QQI awards (NFQ 1-6), the largest numbers were in health/welfare, accounting for a third; business & law accounted for 16%, agriculture for 13% and services for 12%
- Of 7,150 higher education (NFQ 6-10) awards, the biggest shares were in business & law and in education (each accounting for one fifth of higher education awards); of all the regions, the Mid-West had the highest share of higher education awards in the field of education; arts & humanities accounted for 14%, while engineering & construction and health/welfare each accounted for 13%; ICT and science/maths each accounted for 6%
- Regarding postgraduate awards, the highest numbers were in education (34%) and business & law (19%); arts & humanities and health each accounted for 11%.

#### Education indicators, quarter 4 2015:

- Early leavers from education and training (18-24 years): NA\*
- NEET (15-24 years): 9.5%
- Lifelong learning (25-64 years): 7.1%
- Tertiary educational attainment (30-34 years): 46%

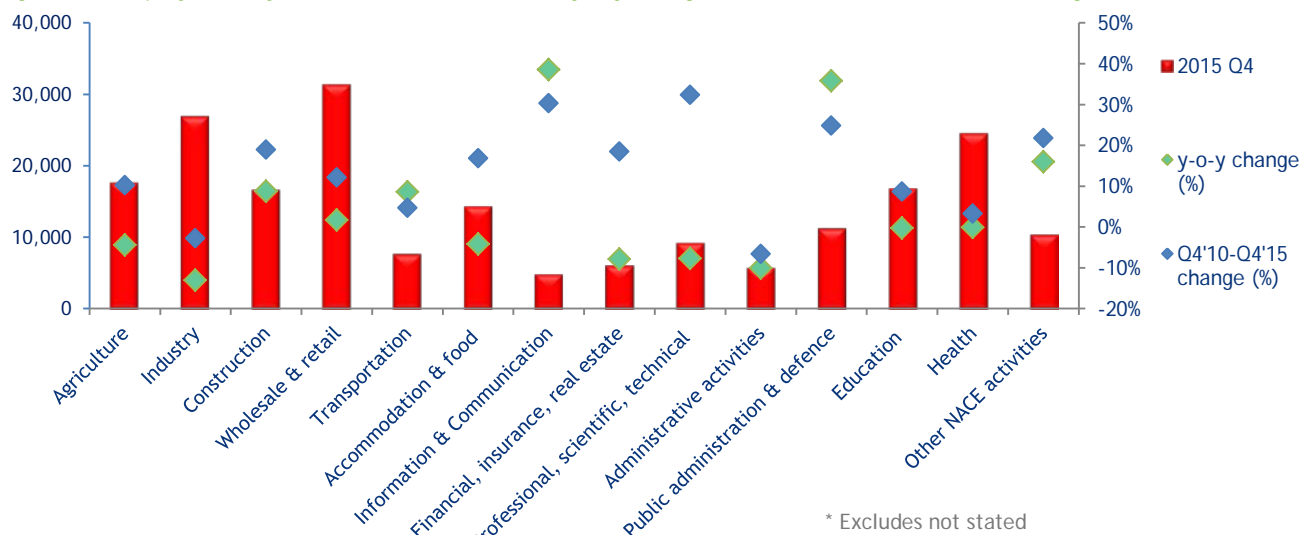
\*The estimated number of early leavers from education & training was too small for inferential statistics.

## 7. South-East



Population	510,400
Population (15-64 years)	325,700
Labour Force	233,100
Participation Rate	58.6%
Employment	205,400
Employment Rate (20-64 years)	66.7%
Unemployment	27,700
Unemployment Rate	11.9%
GVA per person (p.p.)	€25,092
GVA p.p. index (State = 100)	70.8

Figure 7.1 Employment by economic sector Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (South-East)



Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were approximately 233,000 persons in the labour force; the participation rate was 58.6%, almost identical to the rate observed a year ago
- There were 205,400 persons in employment, effectively unchanged year-on-year; 20% were self-employed; the employment rate (20-64 years) was 67%
- When compared with the situation five years previously, employment increased by 11% and unemployment declined by a third; the labour force grew by 3%
- Wholesale & retail was the largest sector of employment, followed by industry and health
- Knowledge intensive services (market, high tech and financial) accounted for 10% of employment; there were 5,000 persons in the information & communication sector.

Figure 7.2 Employment by economic sector\* (South-East), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 7.3 Employment by occupation\* (South-East), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

#### Employment by occupation and sector

- In quarter 4 2015, more than a quarter of managers were in wholesale & retail, where they accounted for 15% of sectoral employment; 11% were in accommodation & food services (proprietors)
- The overwhelming majority (70%) of professionals worked in the public sector (public admin. & defence, health and education combined); they accounted for 40% of employment in this broad sector
- More than a quarter of associate professionals worked in the public sector, almost a fifth were in wholesale & retail, and about one-in-eight were in industry
- Two fifths of those employed in administrative occupations were in the public sector, where they accounted for 15% of sectoral employment
- A third of those in skilled trades were working in agriculture, where they accounted for three quarters of sectoral employment; over a fifth were in construction, where they accounted for over a half of employment; 16% were in industry, where they accounted for a quarter of sectoral employment
- Two thirds of those in caring/leisure & related occupations were in the public sector (health) where they accounted for almost a fifth of employment
- Almost two fifths of operatives were employed in industry, where they accounted for over a quarter of sectoral employment; a quarter were in transport

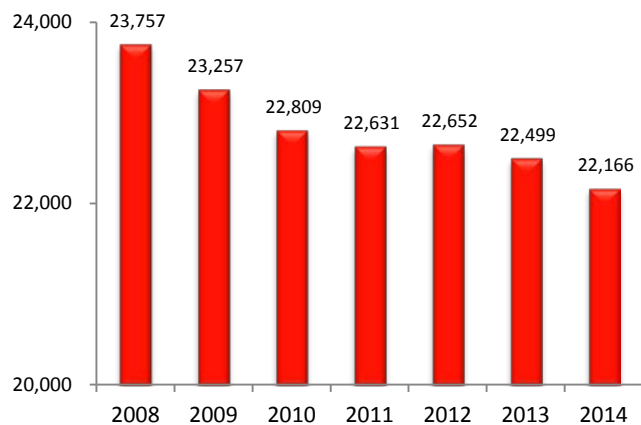
#### Employment by occupation

- In quarter 4 2015, there were approximately 39,400 persons employed in skilled trades occupations; within this broad occupation, farmers comprised a third
- 30,000 persons were employed in professional occupations, which was the second largest occupation
- Elementary occupations, at 26,700, were the third largest grouping in the region
- One-in-ten were employed in associate professional and technical occupations, and similar numbers, approximately 19,000, were in administrative/secretarial and operative occupations.

- One third of those in elementary occupations were in accommodation & food services, where they comprised almost three fifths of sectoral employment
- Within occupational groups, the highest employment was found in the following occupations:
  - Managers: functional managers & directors, shopkeepers & proprietors
  - Professionals: teachers (secondary & primary), nurses & midwives, accountants, programmers & software developers
  - Associate professionals: business sales executives and sales accounts/business development managers, IT operations technicians
  - Admin/secretarial: general admin, admin occupations in the public sector, bookkeeping, payroll management & bank clerks
  - Skilled trades: farmers, chefs, metal working production & maintenance fitters, welders and electricians
  - Services: care workers & home carers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants, cashiers and checkout operators
  - Operatives: food & beverage operatives, routine operators, drivers - large goods vehicle drivers
  - Elementary: kitchen & catering assistants and waiters and waitresses, elementary construction, storage.



Figure 7.4 Active enterprises: Business Economy (South-East)



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

#### Active enterprises

- In 2014, there were approximately 22,200 active enterprises in the South-East region; while reporting a small decline y-o-y (1%), it is estimated that the decline over the period 2008-2014 amounted to 7%, with construction accounting for almost the entire decline
- Construction, followed by wholesale & retail had the largest number of enterprises, with approximately 5,250 and 4,900 respectively, followed by professional activities (2,900)
- 92.3% of active enterprises were micro enterprises, accounting for 37.5% of persons engaged in the business economy; SMEs in total accounted for just over four fifths of all persons engaged.

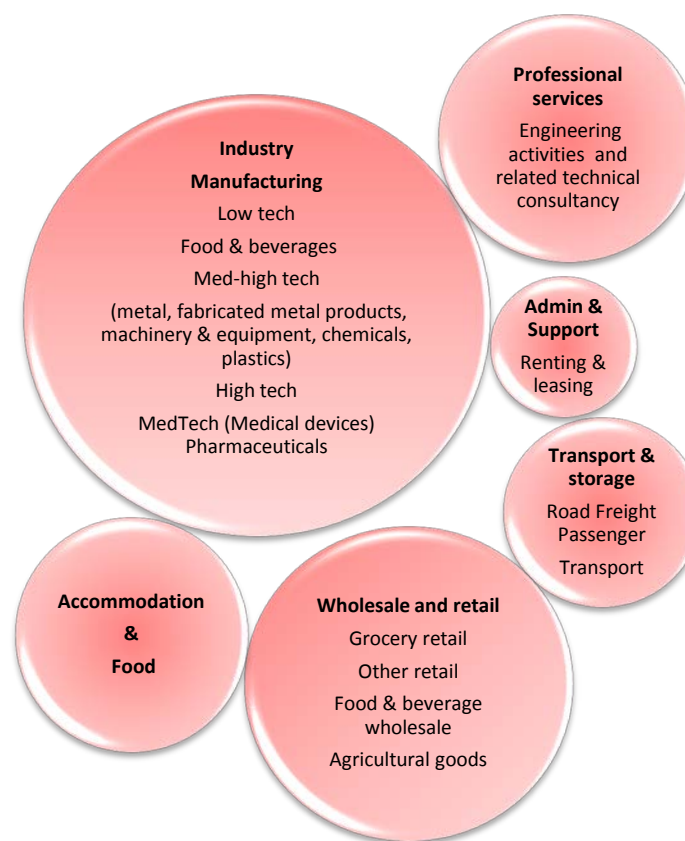
#### Regional economic output (GVA), 2013

- Economic output in 2013 amounted to € 12.5 billion, translating into €25,092 per person
- In relative terms (State = 100) the GVA index was 70.8
- The South-East region accounted for 7.7% of the State's economic output.

#### Medium to large enterprises by sector, South-East (2015)

- Outside the public sector, the highest number of medium to large enterprises in the region in 2014 was found in industry (almost a quarter), followed by wholesale & retail, accommodation & food, and professional services
- Within industry, the largest companies were in manufacturing; there were sizeable companies in MedTech (medical devices), pharmaceuticals, fabricated metal & basic metal products, and food & beverage manufacturing
- Within wholesale & retail the largest companies were in general retail/grocery, with the presence of specialised retailers
- Engineering activities (e.g. instrumentation engineering, safety & protection) and related technical consultancy were the largest employers in professional services
- Hotels were the largest enterprises in accommodation & food services.

Figure 7.5 Sectors with largest enterprises (South-East), 2015



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

Figure 7.6a Industrial units (South-East)

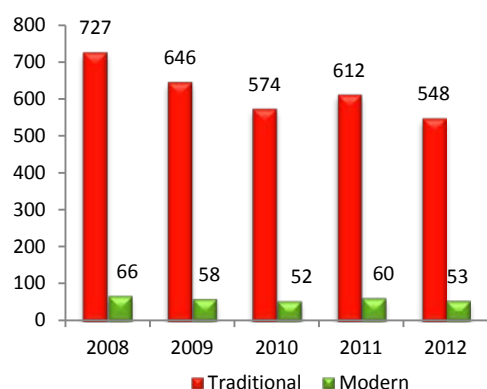
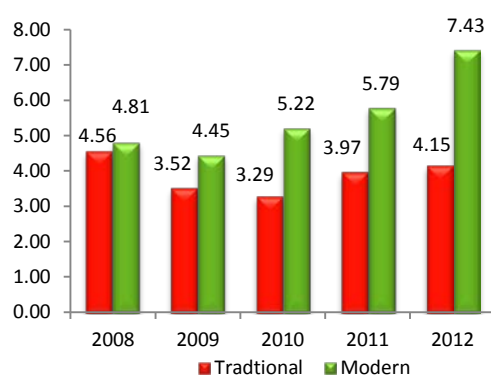


Figure 7.6b Gross output in industrial units (South-East), (€ billion)



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

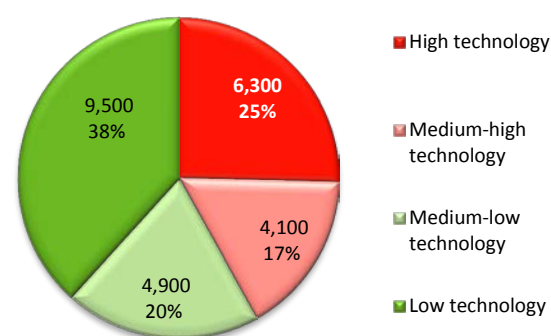
#### Manufacturing employment

- In quarter 4 2015, almost 25,000 persons in the region were employed in manufacturing
- One quarter of these were in high tech-manufacturing activities, predominantly in pharmaceutical products manufacturing
- Low technology manufacturing was the largest segment, accounting for 38% of manufacturing employment; food & beverages accounted for 60% of the segment, and employed 5,000 persons
- Medium-high tech manufacturing (mostly machinery and equipment) accounted for 17% of employment
- Medium-low tech manufacturing (dominated by manufacture of fabricated metal products) accounted for a fifth of employment.

#### Industrial activity

- In 2012, 91% of all industrial units in the South-East region were in the traditional sector
- Over the period 2011-2012, the number of industrial units decreased by 11%; the number of units, as well as the number of persons engaged in them, declined in both sectors (modern and traditional); nevertheless, the value of gross output increased by 28% in the modern sector and by 5% in the traditional sector
- Over the period 2008-2012, the number of industrial units declined by about a quarter, while the number of persons engaged in industrial activities declined by approximately 4,200 (from approximately 26,600 to 22,300)
- In 2012, approximately 12,800 persons were in Irish owned industrial units, while 9,600 were in foreign owned ones - the latter accounted for about two thirds of the gross output; approximately 11,700 persons were engaged in industrial units classified as SMEs, while 10,600 worked in large units; SMEs accounted for less than a third of the industrial gross output
- The share of industrial output exported was 81.6%; this was above the share for the State (77.2%)
- Within manufacturing activities alone, there were 17,300 persons engaged in exporting units, 5,000 in non-exporting units; when compared with 2009, the numbers engaged in non-exporting units declined by almost a fifth, while the numbers engaged in exporting units declined only slightly.

Figure 7.7 Manufacturing employment (South-East), Q4 2015

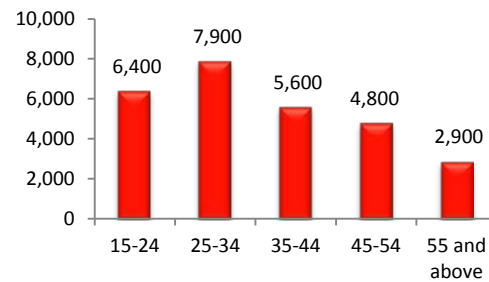


Source: Analysis by SOLAS(SLMRU) based on CSO data

## Unemployment

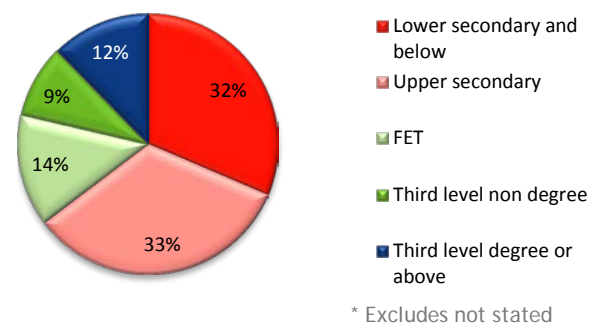
- In quarter 4 2015, there were approximately 27,700 unemployed persons in the region, unchanged from a year previously; 69% were males; two thirds were seeking a job for at least 12 months, while almost a third were jobless for four years or longer (the long term unemployment rate was 7.7%); a quarter have never been in employment
- Age:** those aged 25-34 accounted for the largest share (28%); almost a quarter were younger than 25 (the youth unemployment rate was 27%, and the youth unemployment ratio was 10%)
- Education:** almost a third of those unemployed in the region had attained at most lower secondary education, while a further third had higher secondary; 14% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship (FET); 21% had some third level education
- Sector:** those previously employed in construction accounted for the largest share of unemployed, followed by wholesale & retail
- Occupation:** the majority of unemployed persons were previously employed in elementary occupations and skilled trades, followed by sales/customer service and operative occupations.

Figure 7.8 Unemployment by age (South-East) Q4 2015



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

Figure 7.9 Unemployment by education\*, (South-East) Q4 2015



\* Excludes not stated

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

Figure 7.10a PES job seekers (South-East), April 2016

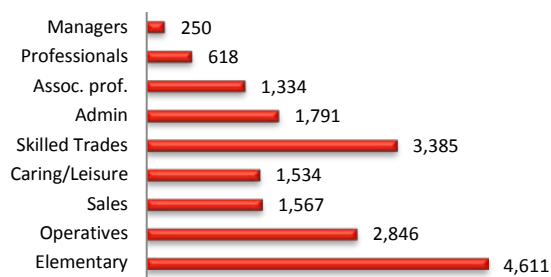
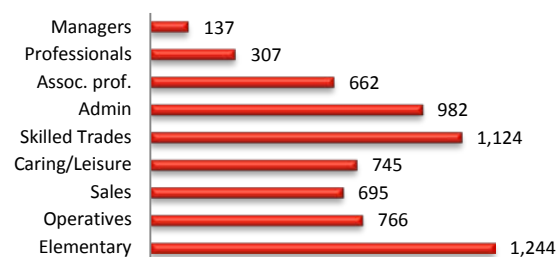


Figure 7.10b PES vacancies (South-East), Jan-Dec 2015



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

## Live Register, PES job seekers and vacancies

- In May 2016, there were approximately 41,400 persons on the Live Register in the region
- In April 2016, approximately 18,000 job seekers were registered with the PES; just over a quarter of them had previously worked in elementary occupations, almost a fifth in skilled trades, 16% in operative and 10% in administrative occupations
- In 2015, over 6,600 vacancies were advertised through DSP Jobs Ireland in the South-East region; the highest number of vacancies was in elementary occupations (e.g. security guards, catering staff, labourers, cleaners), followed by skilled trades (e.g. chefs, electricians, butchers), administrators (e.g. census enumerators), caring (care workers) and operatives (e.g. production operatives, HGV drivers).

**Employment growth and job opportunities**

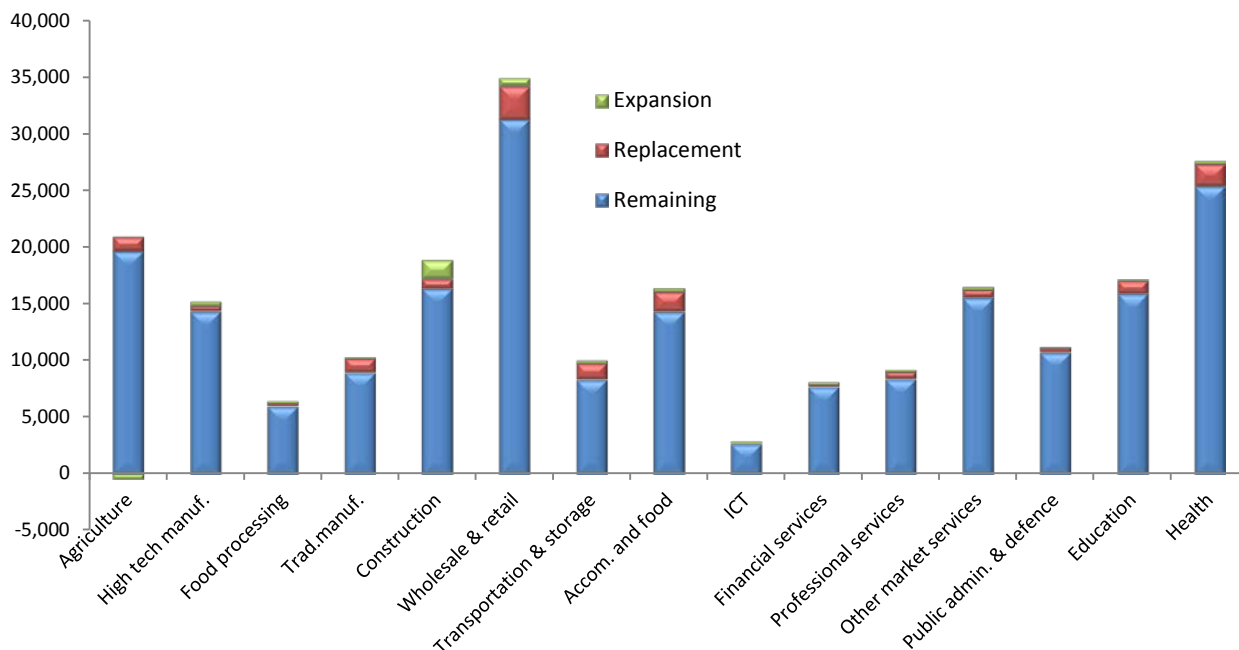
- Over the period Q4 2014 to Q4 2015 employment expanded only marginally; construction, professional services, and public administration & defence were the sectors that expanded
- Over the period Q4 2010 to Q4 2015 employment increased by 11%, translating into an additional 19,500 persons at work; employment expanded in wholesale & retail, construction, accommodation & food, professional services, public administration & defence, and ICT
- Job announcements suggest that job opportunities will arise in construction, ICT, industry, and a range of services, including business and financial services
- Annual employment projections suggest that for each sector, replacement demand exceeds expansion demand, with the exception of construction, where the opposite is the case; the sectors characterised by particularly sizeable replacement demand are wholesale & retail, accommodation & food, as well as health; in the short-term, replacement demand for the region is estimated at 15,500, while expansion demand is projected at 4,800. (Figure 7.12)

Figure 7.11 Job announcements (South-East), 2015 & 2016



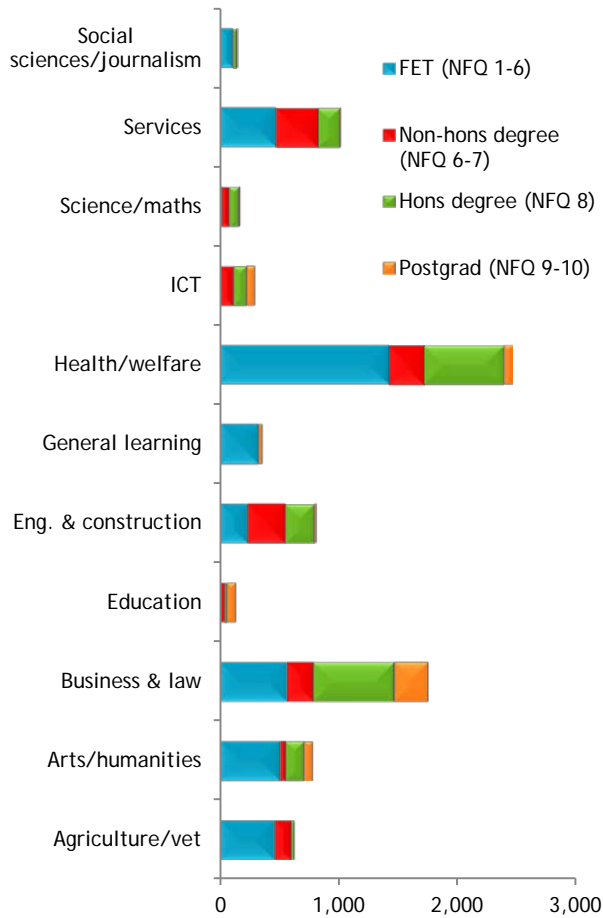
Source: Analysis by SOLAS (SLMRU), various sources

Figure 7.12 Employment projections by sector - annual projected recruitment requirement\*, South-East



Source: SLMRU analysis; \* based on 2015 (annual average) employment figures

Figure 7.13 FET/QOI and HE awards (South-East)



Source: QQI (FET major awards, 2015);  
HEA (HE awards, 2014/2015)

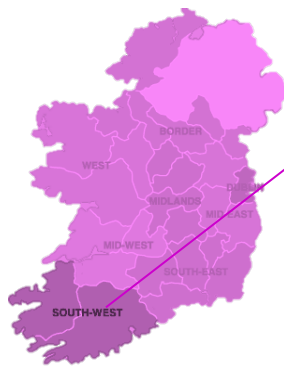
#### Education and training awards and education indicators (South-East)

- Of the total of approximately 8,500 awards (NFQ 1-10), the largest numbers were in health/welfare (29%), followed by business & law (accounting for 21%); services accounted for 12%, while arts & humanities and engineering & construction each accounted for 9% of the total
- Of 4,100 FET/QOI awards (NFQ 1-6), the largest numbers were in health (35%), followed by business & law (14%) and arts/humanities (12%); agriculture and services each accounted for 11% of the total
- Of 4,450 higher education (NFQ 6-10) awards, the largest share, 27%, was in business & law, while health/welfare accounted for 24%; engineering & construction and services each accounted for 13% of all higher education awards
- Regarding postgraduate awards, the largest share was in business & law (44%), which was the largest relative share of all regions; education accounted for 12%, while arts/humanities, health/welfare and ICT each accounted for 11% of postgraduate awards.

#### Education indicators:

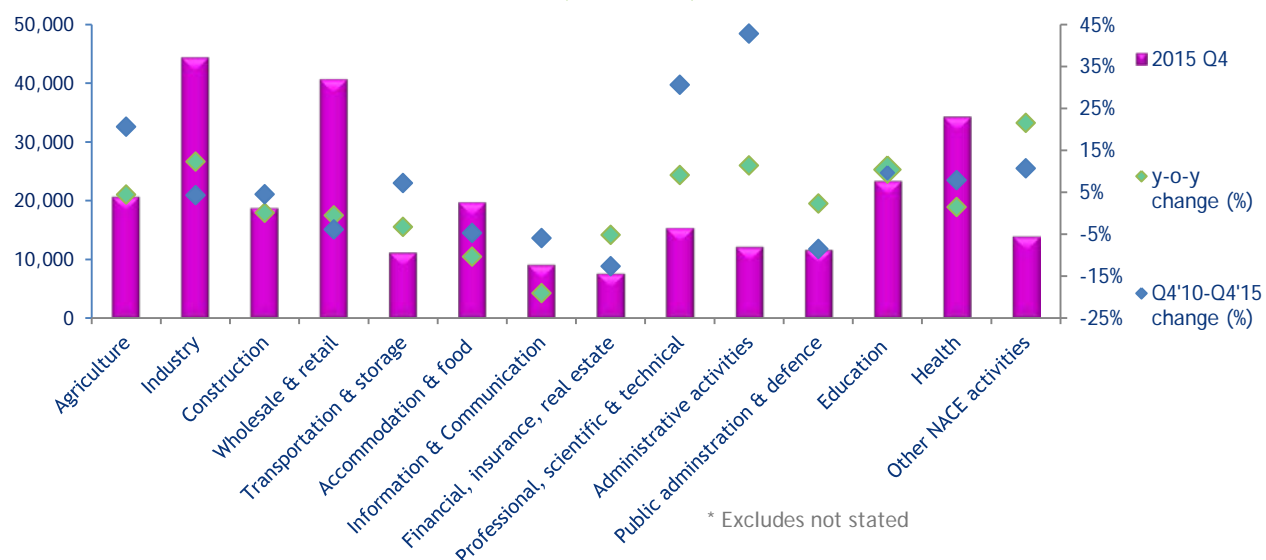
- Early leavers from education and training (18-24 years): 9%
- NEET (15-24 years): 16%
- Lifelong learning (25-64 years): 5.4%
- Tertiary educational attainment (30-34 years): 35%

## 8. South-West



Population	670,700
Population (15-64)	433,400
Labour Force	306,300
Participation Rate	58.1%
Employment	283,900
Employment Rate (20-64)	68.8%
Unemployment	22,400
Unemployment Rate	7.4%
GVA per person (p.p.)	€40,384
GVA p.p. index (State = 100)	113.9

Figure 8.1 Employment by economic sector\* Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (South-West)



Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were 306,300 persons in the labour force, marginally lower than a year ago; the participation rate was 58.1%, unchanged from Q4 2014, and one percentage point below the rate observed in Q4 2010
- There were almost 284,000 persons in employment, an increase of 3% y-o-y; the employment rate was 68.8%; self-employed comprised 18% of the total
- Industry was the largest sector of employment, followed by wholesale & retail
- Knowledge intensive services (market, high tech and financial) accounted for 12% of employment.

Figure 8.2 Employment by economic sector (South-West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 8.3 Employment by occupation\* (South-West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

#### Employment by occupation

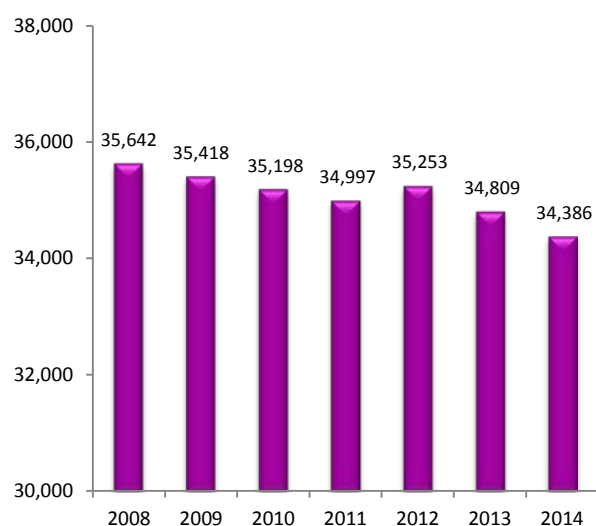
- In quarter 4 2015, there were approximately 54,800 persons employed in skilled trades making it the largest occupational group, accounting for almost a fifth of employment in the region; within this broad occupation, farmers comprised a third
- Over 48,000 persons were employed in professional occupations, while over 29,000 were employed in associate professional occupations; combined, these two occupations accounted for over a quarter of employment
- Year-on-year, professional, administrative, and skilled trades occupations expanded, while elementary occupations contracted.

#### Employment by occupation and sector

- In quarter 4 2015, almost a quarter of managers were working in wholesale & retail; a fifth of them were in food & accommodation
- Three fifths of professionals worked in the public sector (public admin. & defence, health and education), where they accounted for almost a half of employment; one-in-ten worked in industry
- One quarter of associate professionals worked in industry and another quarter in the public sector
- Over a third of those in administrative occupations were in the public sector, one-in-eight were in the financial sector
- A third of those in skilled trades were working in agriculture; almost a quarter were working in industry (mainly in medium-low and low tech manufacturing); skilled trades accounted for over a fifth of employment in industry
- Two thirds of those in caring/leisure and related occupations were in the public sector (effectively all in health, where they accounted for over a third of sectoral employment)
- Two fifths of operatives were working in industry, where they accounted for a fifth of sectoral employment
- One quarter of those in elementary occupations were in accommodation & food services, where they comprised two fifths of sectoral employment
- Within occupational groups, the highest employment was in the following occupations:
  - Managers: production managers and directors in manufacturing, functional managers, manages in retail
  - Professionals: teachers (secondary & primary), nurses & midwives, accountants, programmers & developers
  - Associate professionals: business sales executives and sales accounts/business development managers
  - Admin/secretarial: mainly book keeping/payroll, bank & post office clerks, PA & other secretaries, and generic admin occupations
  - Skilled trades: farmers, chefs, metal working production & maintenance fitters, electricians
  - Services: care workers/home carers, hairdressers, barbers, beauticians & related, child-minders
  - Sales: retail sales assistants, cashiers and checkout operators, customer service occupations
  - Operatives: large goods vehicle drivers, taxi drivers
  - Elementary: cleaners & domestics, kitchen & catering assistants and waiting staff, construction and storage.



Figure 8.4 Active enterprises: Business Economy (South-West)



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

#### Active enterprises

- In 2014, there were approximately 34,400 active enterprises in the private business economy in the South-West region - a 1% decline compared to 2013
- Over the period 2008 -2014, the number of active enterprises declined by about 1,200 or 4%, the smallest relative decline across the regions; construction was behind the decline since in 2014 there were approximately 2,250 fewer enterprises than in 2008; at the same time, there were increases in other sectors, most notably in professional activities and in information & communication; consequently, the share of construction enterprises declined from 27% in 2008 to 20% in 2014, while the share of professional services increased from 15% to 17%
- Overall, 92.5% were micro enterprises; these accounted for a third of all persons engaged in the business economy; large enterprises accounted for 22%, the second largest share (after Dublin).

#### Regional economic output (GVA), 2013 (South-West)

- Economic output in 2013 amounted to €27 billion, translating into €40,384 per person
- In relative terms (State = 100) the GVA index was 113.9
- The South-West region accounted for 16.5% of the State's economic output.

#### Medium to large enterprises by sector (2015)

- Outside the public sector, the highest number of medium to large enterprises in the South-West region was found in industry, followed by wholesale & retail, accommodation & food, professional services, ICT, and construction
- Within industry, the largest companies were in manufacturing, particularly in high tech manufacturing (MedTech, pharmaceuticals, computer, electronic & optical products); in addition, there were large companies in chemicals, engineering, electrical equipment, and food & beverage manufacturing
- Within wholesale & retail the largest companies were in general retail/grocery, with some presence of specialised retailers (high-tech healthcare products, computer sales, etc.)
- Hotels were the largest enterprises in accommodation & food services
- Within ICT, the largest enterprises were engaged in IT security and technology solutions for financial services (FinTech - e.g. back office, system development, etc.) and gaming.

Figure 8.5 Sectors with large enterprises (South-West), 2015



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

Figure 8.6a Industrial units (South-West)

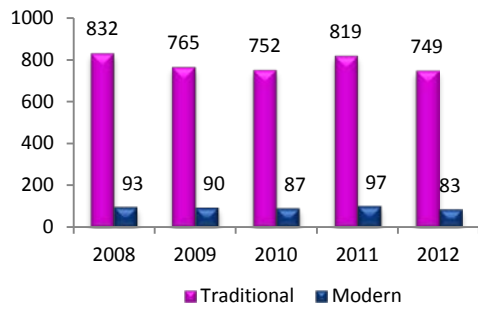
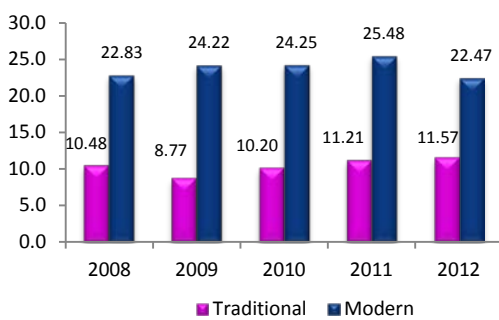


Figure 8.6b Gross output in industrial units, South-West, (€ billion)



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

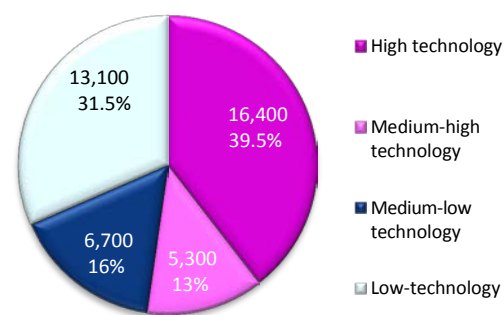
#### Industrial activity

- In 2012, 90% of all industrial units in the South-West region were in the traditional sector
- Over the period 2011-2012, the number of units decreased by 9%; it declined in both sectors (modern and traditional), together with the number of persons engaged in them; the value of gross output increased in the traditional sector (by 3%) but declined in the modern sector (by 12%); still, the modern sector accounted for almost two thirds of the output
- Over the period 2008-2012, the number of industrial units declined by 10%; the number of persons engaged in industrial activities declined by 3,700 (11%), with the traditional sector accounting for the entire decline
- In 2012, approximately 13,500 persons were in Irish owned industrial units, while 17,500 worked in foreign owned units; the latter accounted for 85% of the output; approximately 15,500 (or 50%) persons were engaged in SMEs; SMEs accounted for just over a third of the region's industrial gross output
- The share of industrial output exported was 82.5%; this was above the share for the State (77.2%)
- Within manufacturing activities, there were 24,300 persons engaged in exporting industrial units, while 6,600 were engaged in non-exporting; when compared with 2009, the numbers declined in both, although the decline was only marginal in the exporting units.

#### Manufacturing employment

- In quarter 4 2015 there were 41,500 persons in the South West region employed in manufacturing
- 40% of these were in high-tech-manufacturing activities (three fifths of them were in pharmaceuticals)
- Medium-high tech manufacturing (mostly machinery and equipment) accounted for 13% of employment
- Medium-low tech manufacturing (mostly manufacturing of fabricated metal products) accounted for 16% of employment
- Low technology manufacturing was the second largest segment, accounting for almost a third of manufacturing; within this segment, food & beverages accounted for 75% of employment.

Figure 8.7 Manufacturing employment South-West, Q4 2015



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

### Unemployment (South-West)

- In quarter 4 2015, there were approximately 22,400 unemployed persons in the region; two thirds were male; 55% of those unemployed were seeking a job for at least 12 months (the long term unemployment rate was 3.9%); a fifth have never been in employment
- **Age:** those aged 25-34 accounted for over a quarter of all unemployed; 18% were younger than 25; the youth unemployment rate was 16%; the youth unemployment ratio was 5%
- **Education:** 28% of those unemployed in the region had attained at most lower secondary education; 30% had upper secondary, 17% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship; a quarter had some third level education
- **Sector:** those previously employed in construction accounted for the largest share of unemployed, followed by those who had worked in industry
- **Occupation:** the majority of unemployed persons were previously employed in skilled trades and elementary occupations.

Figure 8.8 Unemployment by age (South-West) Q4 2015

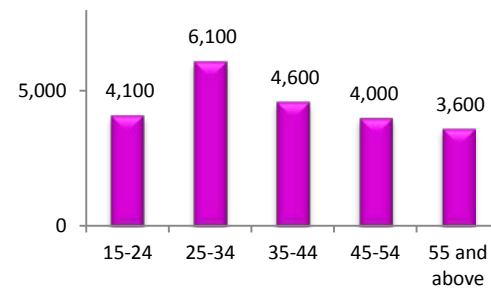
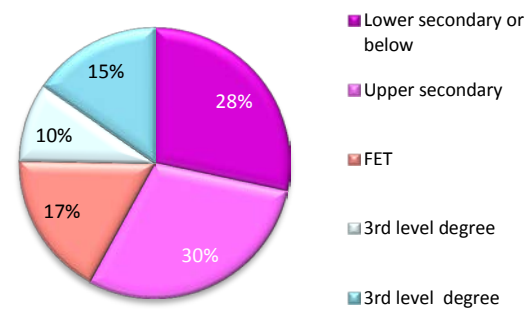


Figure 8.9 Unemployment by education\*, (South-West) Q4 2015



\* Excludes not stated

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

Figure 8.10a PES job seekers (South-West), April 2016

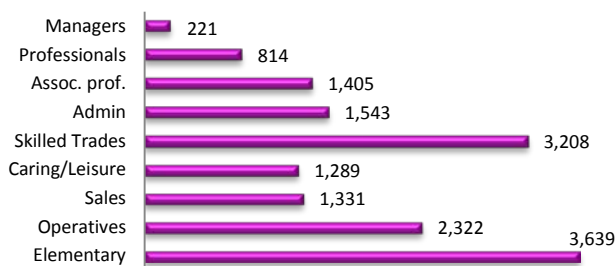
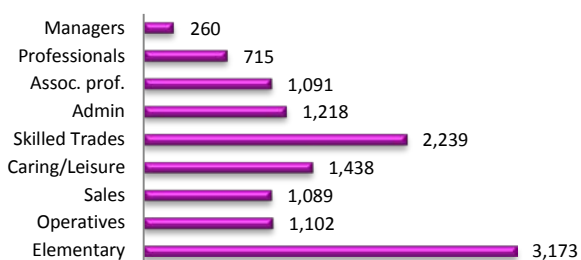


Figure 8.10b PES vacancies (South-West), Jan-Dec 2015



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

### Live Register, job seekers and vacancies

- In May 2016, there were approximately 38,700 persons on the Live Register, 13% fewer than a year ago
- In April 2016, approximately 15,800 job seekers were registered with the PES in the region; the highest number had previously worked in elementary occupations (e.g. construction and security) and skilled trades; about 15% previously worked as operatives, 10% in admin roles, 9% in associate professional occupations, 8% in caring and an equal share in sales & customer service occupations.
- In 2015, over 12,300 vacancies were advertised through DSP Jobs Ireland in the South-West region; the highest number of vacancies was in elementary occupations (e.g. security guards, catering/waiting staff, labourers, cleaners) and skilled trades (mainly chefs but also electricians, carpenters, welders/fitters, mechanics), followed by caring (care workers), administrators (e.g. census enumerators, office admin/receptionist) and operatives (e.g. production operatives, HGV drivers).

### Employment growth and job creation

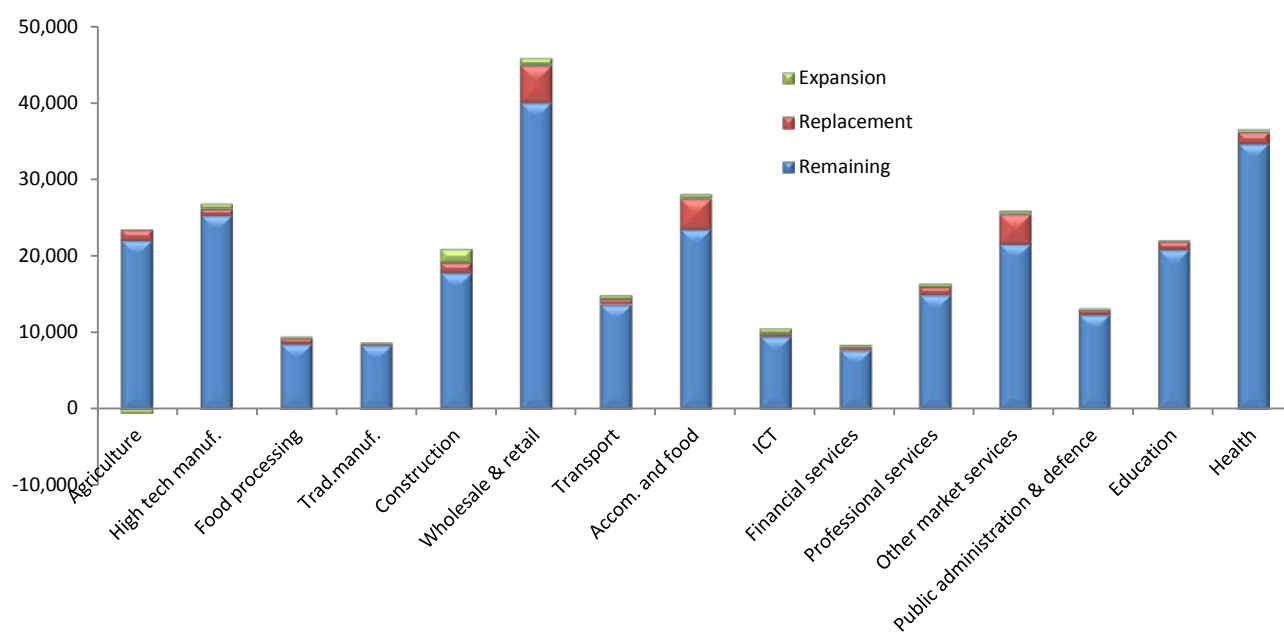
- Over the period Q4 2014 to Q4 2015 employment expanded, resulting in an additional 8,300 persons at work; industry drove the expansion
- Over the period Q4 2010 to Q4 2015 employment increased by 5%, translating into an additional 14,500 persons at work; employment expanded in agriculture, industry, construction, professional and administrative & support activities
- Job announcements suggest that job opportunities will arise in information & communication, industry, professional activities and a range of services, namely business and financial services
- Annual employment projections suggest that for each sector, replacement demand exceeds expansion demand, with the exception of construction, where the opposite is the case; the sectors characterised by particularly sizeable replacement demand are wholesale & retail and accommodation & food; in the short-term, replacement demand for the region is estimated at almost 23,000, while expansion demand is projected at 6,500. (Figure 8.12)

Figure 8.11 Job announcements (South-West), 2015 & 2016



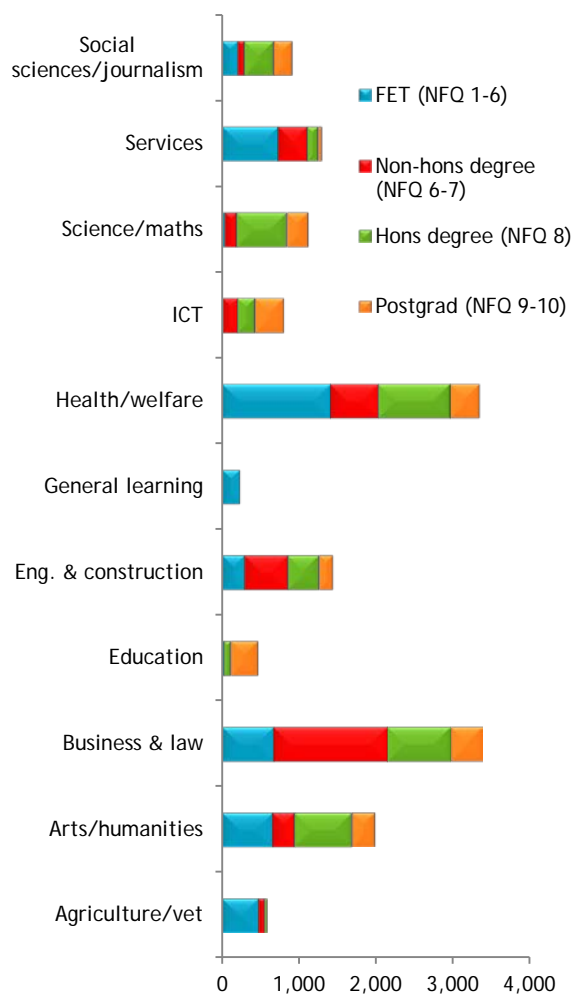
Source: Analysis by SOLAS (SLMRU), various sources

Figure 8.12 Employment projections by sector - annual projected recruitment requirement\*, South-West



Source: SLMRU analysis; \* based on 2015 (annual average) employment figures

Figure 8.13 QQI/FET and HE awards (South-West)



Education and training awards and education indicators (South-West)

- Of the total of 15,500 awards (NFQ 1-10), the largest numbers were in business & law and in health/welfare (accounting for 22% and 21% respectively); arts/humanities accounted for 13%, engineering & construction accounted for 9%, while services accounted for 8%; science/maths accounted for 7%, while ICT accounted for 5%
- Of approximately 4,700 QQI/FET awards (NFQ 1-6), the largest numbers were in health/welfare, accounting for 30%; services, arts/humanities, and business & law each accounted for 14% of the total QQI/FET awards
- Of approximately 10,800 higher education (NFQ 6-10) awards, the biggest share was in business & law (25%), while health/welfare accounted for 18%; arts & humanities accounted for 12%, engineering & construction for 11%, science/maths for 10% and ICT accounted for 7%
- Regarding postgraduate awards, the highest numbers were in business & law (16%), followed by health/welfare and ICT (15% each), education (14%), arts & humanities (12%), and science & maths (11%).

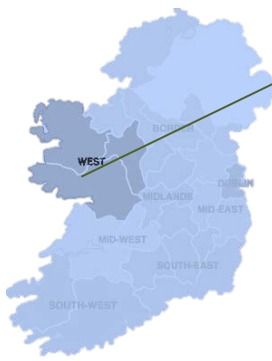
Source: QQI (FET major awards, 2015);

HEA (HE awards, 2014/2015)

Education indicators

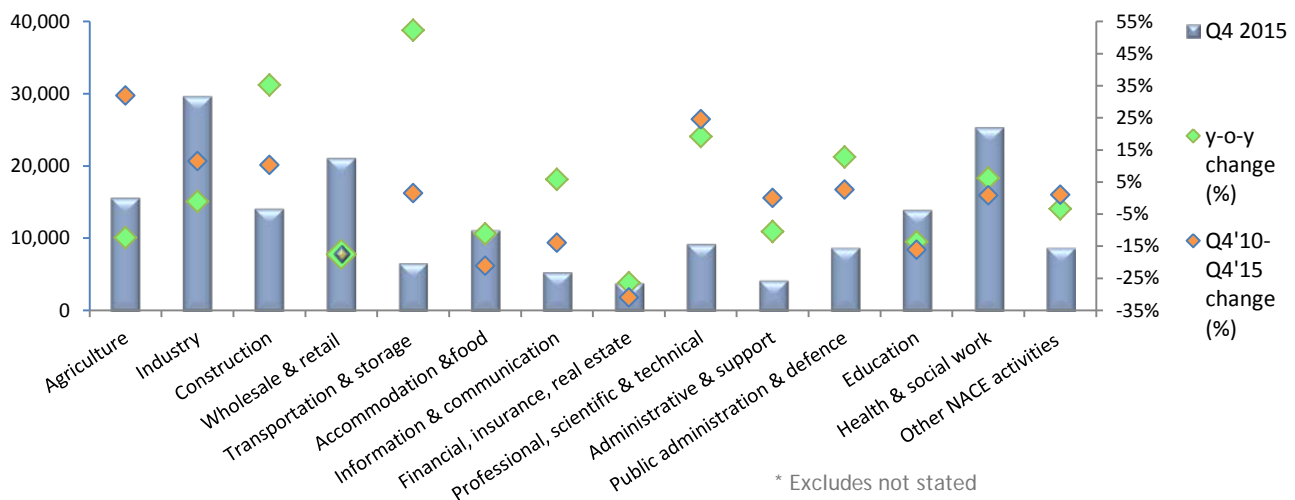
- Early leavers from education and training (18-24 years): 6%
- NEET (15-24 years): 11%
- Lifelong learning (25-64 years): 7.4%
- Tertiary educational attainment (30-34 years): 51%

## 9. West



Population	435,900
Working age (15-64)	273,900
Labour force	199,500
Participation rate	58.8%
Employment	178,600
Employment rate (20-64)	67.9%
Unemployment	20,800
Unemployment rate	10.6%
GVA (Gross Value Added) per person (€)	26,839
GVA index (State =100)	75.7

Figure 9.1 Employment by economic sector\* Q4 2015, y-o-y change (%), and Q4 2010 - Q4 2015 change (%), (West)

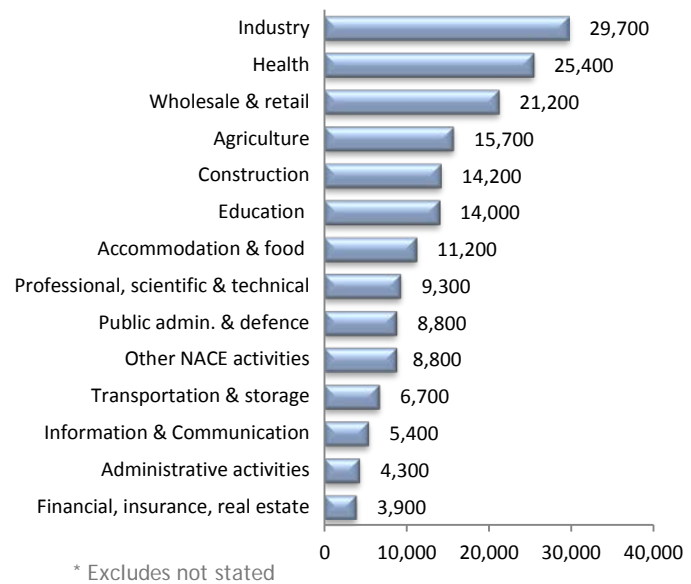


Source: SLMRU (SOLAS) analysis of CSO data

### Labour force, participation, and employment

- In quarter 4 2015, there were 199,500 persons in the labour force in the West region and the participation rate was 58.8%; employment totalled 178,600; the employment rate (20-64 years) was 67.9%; the region registered a decline regarding these indicators, year-on-year.
- 22% of all in employment were self-employed, of which 80% had no employees
- Industry, employing almost 30,000 persons, was the largest sector, followed by health, and wholesale & retail; professional activities employed 9,300, while there were 5,400 and 3,900 persons in information & communication and in financial activities respectively; subsequently, knowledge intensive services (market, high tech and financial) accounted for 11% of employment.

Figure 9.2 Employment by economic sector\* (West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data



Figure 9.3 Employment by occupation\* (West), Q4 2015



Source: SLMRU (SOLAS) analysis of CSO data

#### Employment by occupation

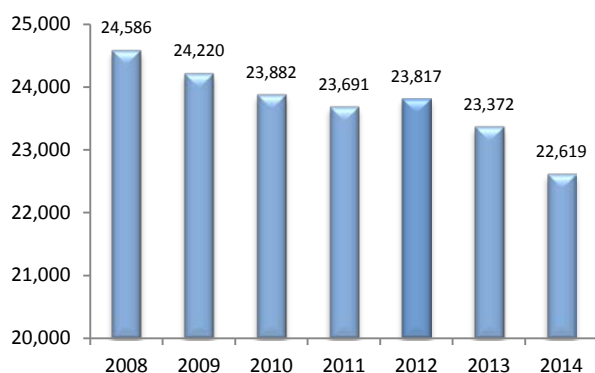
- In quarter 4 2015, there were approximately 38,700 persons (more than a fifth of regional employment) working in skilled trades occupations; farmers accounted for more than a third of this occupation and for 8% of total employment
- Almost 30,000 persons were employed in professional occupations
- Caring, leisure & related, elementary, and administrative/secretarial occupations accounted for 10% of regional employment each
- There were approximately 10,700 persons employed in sales & customer services occupations.

#### Employment by occupation and sector

- In quarter 4 2015, managers comprised about a quarter of employment in wholesale & retail and almost a fifth in accommodation & food services
- The overwhelming majority (67%) of professionals worked in the public sector (public admin. & defence, health and education combined), where they accounted for 40% of employment
- 28% of associate professionals were employed in the public sector and more than a fifth in industry
- 46% of all in administrative occupations were employed in the public sector, where they accounted for 16% of total employment
- The largest share (38%) of those employed in skilled trades (farmers) were working in agriculture, accounting for 93% of all working in the sector; 22% worked in construction, where they accounted for 60% of sectoral employment; 18% worked in industry, where they accounted for a quarter of sectoral employment; within industry, skilled trades comprised the largest occupational grouping in manufacturing, especially in the medium-high technology segment
- Two thirds of those working in caring & leisure occupations were working in the public sector, mostly in health, where they accounted for a third of sectoral employment
- More than a half of operatives were employed in industry, where they accounted for a third of employment
- The largest share of those in elementary occupations were in accommodation & food services, where they comprised 42% of sectoral employment
- Within occupational groups, the highest employment was found in the following occupations:
  - Managers: managers in retail & wholesale, functional managers & directors
  - Professionals: teachers (secondary & primary), nurses
  - Associate professionals: science, engineering and production technicians (especially laboratory), business sales executives
  - Admin/secretarial: admin occupations in the public sector, general administrators
  - Skilled trades: farmers, chefs, construction building trades (e.g. carpenters & joiners)
  - Services: care workers & home carers, hairdressers, barbers, beauticians & related occupations
  - Sales: retail sales assistants
  - Operatives: assemblers & routine operatives
  - Elementary: construction labourers, waiting staff, kitchen & catering assistants.



Figure 9.4 Active enterprises: Business Economy (West)



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

#### Active enterprises

- In 2014, there were approximately 22,600 active enterprises in the West region, 3% fewer than in 2013
- When compared to 2008, the number of active enterprises declined by approximately 2,000, or 8%
- Construction had the largest number of enterprises, accounting for a quarter of all; wholesale & retail accounted for a fifth; accommodation & food accounted for one-in-ten of all active enterprises in the business economy in 2014
- 93% were micro enterprises, accounting for almost two fifths of all persons engaged in the business economy; SMEs accounted for 86.5% of all engaged.

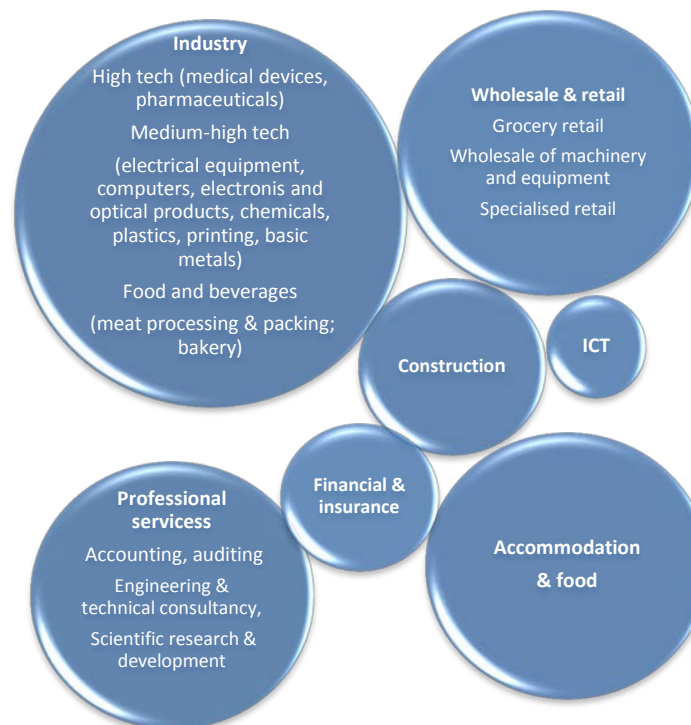
#### Regional economic output (GVA), 2013 (West)

- Economic output in 2013 amounted to €12 billion, translating into €26,839 per person
- In relative terms (State = 100) the GVA index (per person) was 75.7
- The South-West region accounted for 7.3% of the State's economic output.

#### Medium to large enterprises by sector (2015)

- Outside the public sector, the highest number of medium to large enterprises (almost one quarter of all employing 50 persons or more) in the West region was found in industry, mostly in low tech manufacturing (food processing), but also in high tech (computer, electronic & optical products), and medium-high tech segments (chemicals, plastics, metal products, and electrical equipment)
- Within accommodation & food, hotels were the largest employers
- Within wholesale & retail the largest enterprises operated in generic, as well as in specialised retail
- Within professional services, the largest enterprises were in accounting, engineering & technical consultancy, and in scientific R&D
- Within the broad financial sector, the largest were insurance companies
- Within the ICT sector, enterprises engaged in software publishing were the largest.

Figure 9.5 Sectors with largest enterprises (West), 2015



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

Figure 9.6a Industrial units (West)

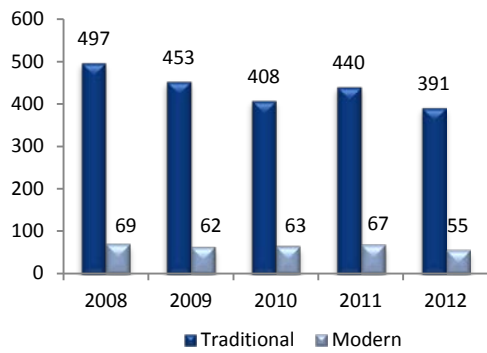
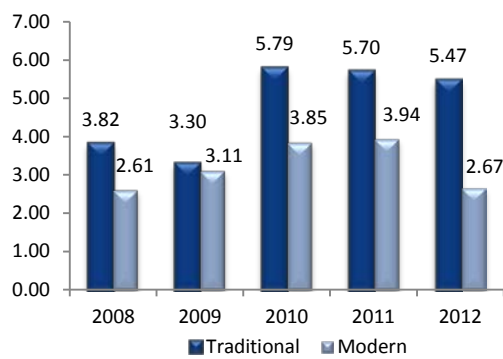


Figure 9.6b Gross output in industrial units (West), (€ billion)



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

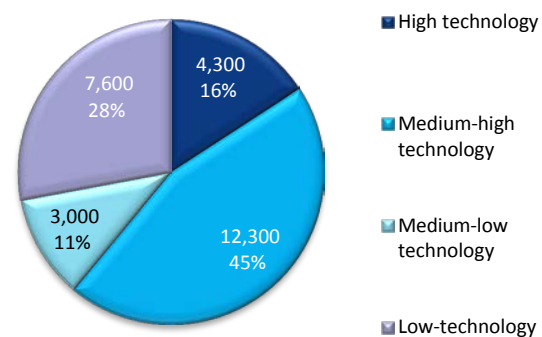
### Industrial activity

- In 2012, 88% of all industrial units in the West were in the traditional sector; however, the modern sector accounted for more than a half of persons engaged in industry
- Over the period 2011 to 2012, the number of industrial units decreased in both sectors; the number of persons engaged declined by approximately 4,100; there were 2,600 fewer in the modern sector and 1,400 fewer in the traditional sector
- In 2012, the value of gross output decreased in both sectors in relation to 2011; while the decline was relatively more pronounced in the modern sector, its contribution to the regional industrial output still amounted to one third
- Over the period 2008-2012, the number of industrial units declined by a fifth in each sector; the number of persons engaged declined by 4,100 (the traditional sector contracted by 2,200 and the modern sector by 1,900 persons)
- In 2012, 8,100 persons worked in Irish owned industrial units; 10,800 worked in foreign owned units; the latter accounted for four fifths of the region's gross industrial output; while approximately 9,700 persons (or 51%) were engaged in industrial units classified as SMEs, SMEs accounted for only 23% of the region's industrial gross output
- Within manufacturing activities alone, there were 15,000 persons engaged in exporting units in 2012, while 3,900 were engaged in the non-exporting units; when compared with 2009, the number of persons engaged in manufacturing activities declined by 13% in both exporting and in non-exporting units.

### Manufacturing employment

- In quarter 4 2015, there were 27,200 persons employed in manufacturing (accounting for 15% of the region's total employment)
- Medium-high tech manufacturing (mostly machinery and equipment) employed almost 12,300 persons, accounting for 45% of manufacturing employment
- 16% were employed in high tech manufacturing (mostly manufacture of pharmaceutical products)
- Medium-low tech manufacturing (mostly fabricated metal) comprised 11% of manufacturing employment
- Low-tech manufacturing accounted for 28%; food industry accounted for a half of this segment.

Figure 9.7 Manufacturing employment (West), Q4 2015

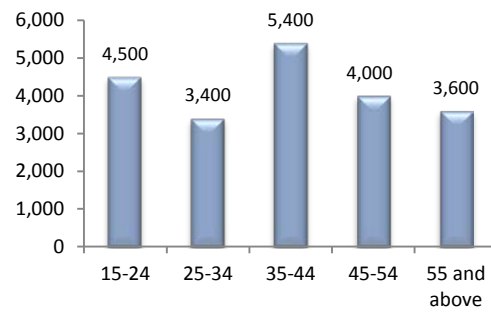


Source: Analysis by SOLAS(SLMRU) based on CSO data

### Unemployment

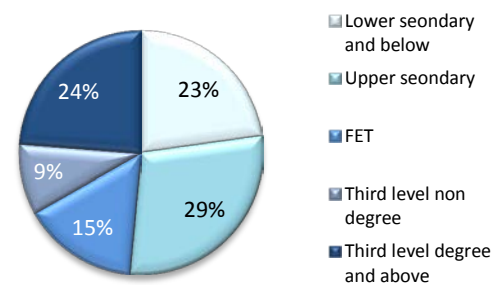
- In quarter 4 2015, there were approximately 20,800 unemployed persons in the region; almost two thirds were male; over a half were seeking a job for at least 12 months (the long term unemployment rate was 5.8%); almost a quarter had no previous employment experience
- **Age:** those aged 35-44 accounted for 26%, while 22% were younger than 25; the youth unemployment rate was 30%, while the youth unemployment ratio was 10%
- **Education:** of those unemployed, 23% had attained at most lower secondary education, 29% had upper secondary, while 15% had a technical or vocational qualification, including an advanced certificate or completed apprenticeship (FET); a third had some third level education
- **Sector:** those previously employed in construction accounted for the largest share of unemployed, followed by those who had worked in industry and in wholesale & retail
- **Occupation:** those previously employed in elementary occupations accounted for the largest share of unemployed, followed by skilled trades, operatives and professionals.

Figure 9.8 Unemployment by age (West) Q4 2015



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

Figure 9.9 Unemployment by education\*, (West) Q4 2015



\*Excludes not stated

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

Figure 9.10a PES job seekers (West), April 2016

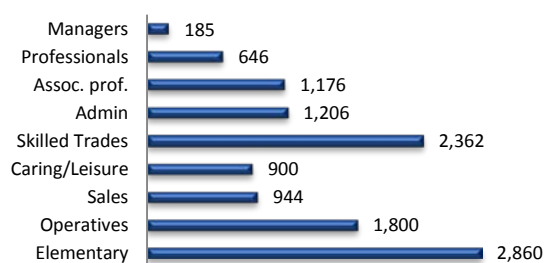
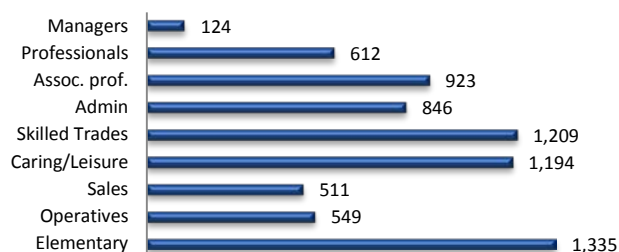


Figure 9.10b PES vacancies (West), Jan-Dec 2015



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

### Live Register, PES job seekers and vacancies (West)

- In May 2016, there were approximately 27,700 persons on the Live Register in the region, 11% fewer than a year previously
- In April 2016, approximately 12,100 job seekers were registered with the PES in the region; the highest share of job seekers (24%) had previously worked in elementary occupations, 20% had previously worked in skilled trades (e.g. bricklayers, painters); 15% had previously worked as operatives (e.g. process operatives); 10% had been in either administrative or in associate professional occupations
- In 2015, 7,300 vacancies were advertised through DSP Jobs Ireland in the West region; the highest number of vacancies was in elementary occupations (e.g. catering staff, cleaners, security guards), skilled trades (e.g. chefs, electricians, butchers, carpenters) and caring (care workers), followed by associate professionals (mainly in sales and marketing roles) and administrators (census enumerators).

### Employment growth and job creation

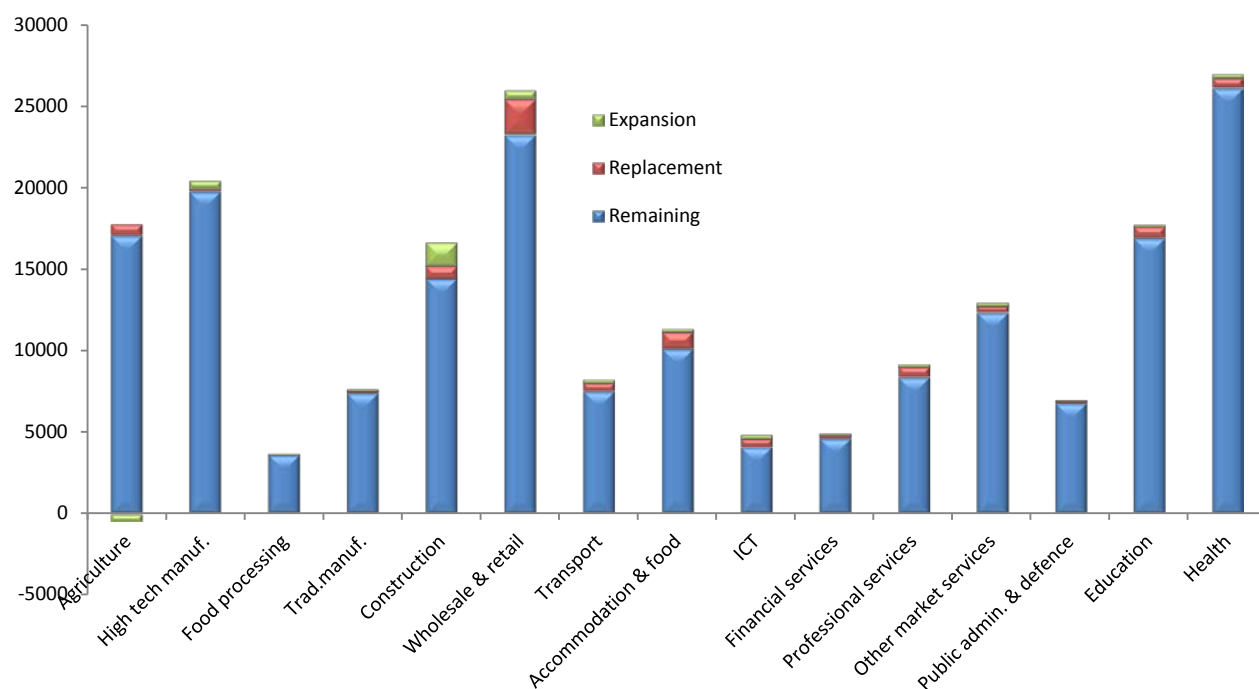
- Over the period Q4 2014 to Q4 2015, the region reported marginal contraction in employment, by 1%; the decline was largest in wholesale & retail; at the same time, employment increased relatively strongly in construction
- Employment in Q4 2015 was marginally lower when compared to Q4 2010, with contraction observed in wholesale & retail, accommodation & food, financial & related activities, as well as in education
- Recent job announcements suggest that job opportunities will arise in industry (high tech manufacturing, mostly MedTech & pharmaceuticals), in information & communication, construction, and, to a lesser extent, in business services and in wholesale & retail
- Annual employment projections suggest that for each sector, replacement demand exceeds expansion demand, with the exception of construction, where the opposite is the case; the sectors characterised by particularly sizeable replacement demand are wholesale & retail and accommodation & food; in the short-term, replacement demand for the region is estimated at almost 9,000, while expansion demand is projected at just above 4,000. (Figure 9.12)

Figure 9.11 Job announcements (West), 2015 & 2016



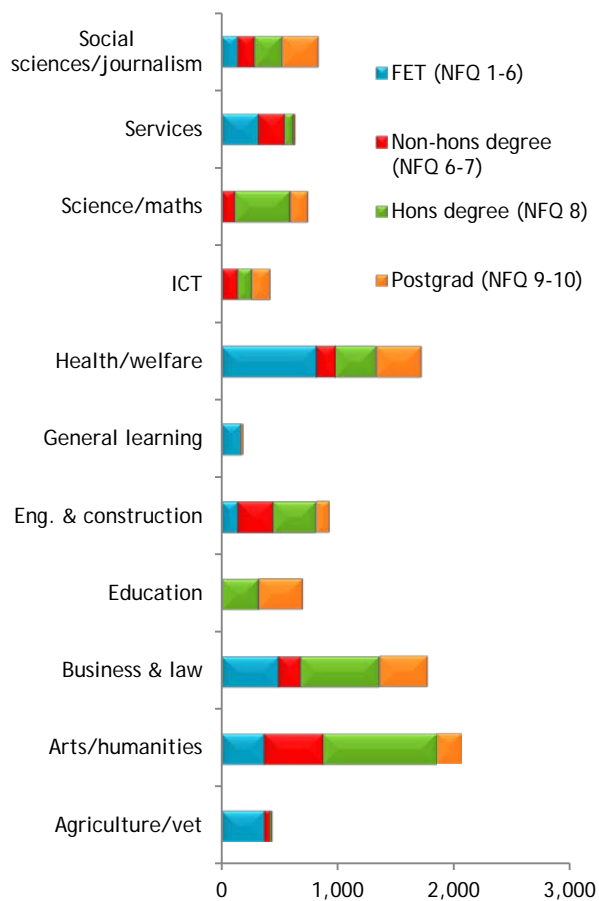
Source: Analysis by SOLAS (SLMRU), various sources

Figure 9.12 Employment projections by sector - annual recruitment requirement\*, West



Source: SLMRU analysis; \* annual projections are based on 2015 annual average employment figures

Figure 9.13 QQI/FET and HE awards, West



Source: QQI (FET major awards, 2015),  
HEA (HE awards, 2014/2015)

### Education and training awards and education indicators (West)

- Of the almost 10,400 awards (NFQ 1-10), the largest shares were in arts & humanities (20%), followed by business & law (17%) and health/welfare (16%); engineering & construction accounted for 9%, while science & maths and education each accounted for 7%
- Of approximately 2,800 QQI/FET awards (NFQ 1-6), the largest number were in health/welfare (800, accounting for 29% all QQI/FET awards), followed by business & law (almost 500, or 17%); agriculture accounted for 13% (which was, together with the Mid-West, the highest share of all regions); 13% were in arts & humanities, 11% were in services, and 5% in engineering & construction
- Of 7,600 higher education (NFQ 6-10) awards, the highest shares were in arts & humanities (22%) and business & law (17%); there were 12% in health/welfare and 10% in each science & maths and in engineering & construction; 5% of higher education awards were in ICT
- There were over 2,100 postgraduate awards in the West region; of these, 19% were in business & law; education and health/welfare each accounted for 18%, and social sciences accounted for 15%; arts & humanities accounted for 10%; there were 7% awards in science/maths and an equal share were in ICT.

### Education indicators - quarter 4 2015

- Early leavers from education and training (18-24 years): 10%
- NEET (15-24 years): 15%
- Lifelong learning (20-64 years): 6.5%
- Tertiary educational attainment (30-34 years): 48%

## APPENDIX A Members of the Expert Group on Future Skills Needs

Ms. Una Halligan	Chairperson
Inez Bailey	Director, National Adult Literacy Agency
Peter Baldwin	Assistant Secretary, Department of Education and Skills
Ray Bowe	IDA Ireland
John Burke	Principal Officer, Department of Public Expenditure and Reform
Liz Carroll	Training and Development Manager, ISME
Mark Christal	Manager, Client Development, Mentoring and Skills, Enterprise Ireland
Ned Costello	Chief Executive, Irish Universities Association
Margaret Cox	Managing Director, I.C.E. Group
Bill Doherty	Executive Vice President, EMEA, Cook Medical
Tony Donohoe	Head of Education, Social and Innovation Policy, IBEC
Dr. Bryan Fields	Director, Strategy, Research and Evaluation, SOLAS
Paul Healy	CEO, Skillnets
Joe Hogan	Founder, Chief Technology Officer & VP Openet Labs & IP Management
Declan Hughes	Assistant Secretary, Department of Jobs, Enterprise and Innovation
Dr. Brendan Murphy	President, Cork Institute of Technology
Dr. Vivienne Patterson	Head of Skills and Engagement, Higher Education Authority
Dr. Peter Rigney	Industrial Officer, ICTU

## APPENDIX B Recent Publications by the EGFSN

Report	Published
National Skills Bulletin 2016	Sep. 2016
Future Skills Needs of the Biopharma Industry in Ireland	Aug. 2016
Lifelong Learning Participation Among Adults in Ireland, Quarter 4 2015	July 2016
The EGFSN Statement of Activity 2015	May 2016
Vacancy Overview 2015	May 2016
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard+ 2016	Feb. 2016
Assessment of Future Skills Requirements in the Hospitality Sector in Ireland 2015-2020	Nov. 2015
Regional Labour Markets Bulletin 2015	Oct. 2015
Monitoring Ireland's Skills Supply - Trends in Education and Training Outputs	July 2015
National Skills Bulletin 2015	July 2015
Vacancy Overview 2014	May 2015
Lifelong Learning among Adults in Ireland, Quarter 4 2014	May 2015
A Study of the Current and Future Skills Requirements of the Marine/Maritime Economy to 2020	April 2015
The Expert Group on Future Skills Needs Statement of Activity 2014	April 2015
Addressing the Demand for Skills in the Freight Transport, Distribution and Logistics Sector in Ireland 2015 -2020	Feb. 2015
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2015	Jan. 2015
Regional Labour Markets Bulletin 2014	Sep. 2014
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2014	Aug. 2014
National Skills Bulletin 2014	July 2014
Vacancy Overview 2013	May 2014
Assessing the Demand for Big Data and Analytics Ss, 2013 - 2020	May 2014
The Expert Group on Future Skills Needs Statement of Activity 2013	March 2014
Regional Labour Markets Bulletin 2013	March 2014
Guidance for Higher Education Providers on Current and Future Skills Needs of Enterprise: Springboard 2014	Feb. 2014
Addressing Future Demand for High-Level ICT Ss	Nov. 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	Feb. 2013
Vacancy Overview 2012	Feb. 2013
Regional Labour Markets Bulletin 2012	Jan. 2013
Monitoring Ireland's Skills Supply: Trends in Education and Training Outputs 2012	July 2012

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