

# Annual Employment Survey 1995

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## INTRODUCTION

Last year a net total of 10,000 full-time jobs were created in manufacturing, internationally traded services and international financial services (10,400 when companies within the remit of Údarás na Gaeltachta are also taken into account). This represents an increase of 57% in the number of net new jobs created in 1995, and the highest annual increase on record. This resulted both from additional new jobs created and a decline in the number of jobs lost.

The number of new jobs created in 1995 amounted to 24,186, an increase of 11.2% on 1994 and the number of jobs lost fell to 14,212, a decline of 7.8% on the figure recorded in 1994. This is the second year in a row that job creation increased and job losses declined. The figure for jobs lost is the lowest since 1978.

The number of net new full time jobs created by Irish-owned companies (3,553) was the highest since 1979.

Manufacturing accounted for 7,784 (78%) of the net new full-time jobs created in 1995 and foreign owned companies accounted for the majority (65 per cent) of this.

Over the past decade three distinct trends have emerged in the area of employment opportunities in Ireland.

- In many developed economies there have been sharp declines in manufacturing employment. For example, in the UK, which is our closest neighbour and largest trading partner, manufacturing employment has fallen by 25% over the past 10 years. In Ireland, by contrast, there has been a strong 12% growth in the period 1986 to 1995.

The latest data, collected during 1995, shows that growth in full-time manufacturing employment in Ireland accelerated to 4% in 1995, almost double the 1994 rate of growth. It was also substantially ahead of growth rates in most developed countries. The exceptions are mainly Northern European countries now beginning to recover from declines of more than 20% over the preceding decade. The 1995 data appears to indicate, therefore, that Ireland's consistent development of its manufacturing base, which is increasingly focused on high technology industries, is continuing apace - and well ahead of international trends.

- The second trend is the increased significance of internationally traded services and international financial services in job creation. From a base of 5,500 jobs ten years ago, employment has risen to 18,825 over the past 10 years, a rate of growth of 240% and accounted for more than half the rise in permanent full-time employment in manufacturing and internationally traded services in that period.

During 1995 employment in internationally traded services and financial services continued to grow strongly, rising by over 13%. The biggest contributor to this growth was the area of international financial services, where a 24% rise in employment in 1995 is directly attributable to the continued development of the International Financial Services Centre in Dublin.

- The third trend is the growth in temporary, permanent part-time and short term contract employment, which increased by just under 150% between 1987 and 1995 from 9,600 to 24,000 jobs. This form of employment has increased from 4.5% of total employment in 1987 to 9.5% in 1995.

Employment grew by 51% since 1993, and growth has been most rapid in foreign owned companies.

The trend towards atypical forms of employment is increasing and, if sustained, is likely to become increasingly significant in the overall employment mix in the years ahead.

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## PREFACE

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This document sets out the final results of the 1995 annual employment survey (*see endnote 1 at end of document*). The survey is an annual census of employment in all known active manufacturing and internationally traded service companies and has been carried out each year since 1973. Forfás, in line with its mandate to co-ordinate the activities of Forbairt and IDA Ireland, continues to carry out the survey through its Enterprise Policy and Planning Division with the co-operation of Forbairt, IDA Ireland and Shannon Development regional staff.

This report also incorporates the results of surveys by Shannon Development of companies falling within its remit (Irish-owned companies in the Mid-West region and foreign-owned companies in the Shannon Zone).

The national results for 1995 presented in Section 1 have been adjusted to incorporate the manufacturing and internationally traded service employment of Údarás na Gaeltachta. Section 2 & 3 includes data from Forbairt, IDA Ireland and Shannon Development and Section 4 includes data from Forbairt and IDA Ireland.

The results for a total of 6,769 companies (including Shannon Development companies (*see endnote 2 at end of document*)) are included in this report. In addition to permanent employment, the survey also incorporates data on temporary, permanent part-time and short term contract employment.

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## OVERALL NATIONAL RESULTS

(Includes data on companies under the remit of Forbairt, IDA Ireland, Shannon Development and Údarás na Gaeltachta)

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### 1.1 Net change in employment and resulting total employment in 1995

**Table 1: Net change in employment 1995**

	Permanent full-time	Temporary, part-time and short term contract <sup>3</sup>	Total
<b>Total net change</b>	<b>10,400</b>	<b>3,200</b>	<b>13,600</b>
<i>Components:</i>			
▪ Manufacturing	8,100	2,450	<b>10,550</b>
▪ Internationally traded services	2,300	750	<b>3,050</b>

**Table 2: Overall Employment**

	Permanent full-time	Temporary, part-time and short term contract <sup>3</sup>	Total
<b>Overall employment</b>	<b>233,000</b>	<b>24,000</b>	<b>257,000</b>
<i>Components:</i>			
▪ Manufacturing	213,750	21,250	<b>235,000</b>
▪ Internationally traded services	19,250	2,750	<b>22,000</b>

In 1995 strong growth continued in employment in the manufacturing and internationally traded and international financial services sectors of the economy:

- employment in **manufacturing** increased by over 10,500, or 4.7%, to 235,000;
  - employment in **internationally traded and international financial services** companies increased by over 3,000, or 16.1%, to 22,000;
  - **temporary, part-time and short term contract** employment also showed strong growth, increasing by 3,200, or 15.4%, to 24,000.
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## NATIONAL AND INTERNATIONAL RESULTS

(Includes data on companies under the remit of Forbairt, IDA Ireland and Shannon Development)

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### 2.1: 1995 Survey Results

- This year overall permanent full-time employment in manufacturing and internationally traded and financial services companies grew by 9,974 (4.6%) to 228,368. This is the highest net growth since 1979. Foreign-owned companies accounted for 6,421 (64.4%) of the growth and Irish-owned companies contributing 3,553 (35.6%).
- 1,100 Foreign-owned companies (including Foreign-owned Shannon Development and food & natural resource companies for which Forbairt is responsible) accounted for 106,921 (46.8%), and 5,946 Irish companies for 121,447 (53.2%) of the total employment of 228,368 in 1995, compared to 46% and 54% respectively in 1994.
- Manufacturing employment accounted for 7,784 jobs (78%) of the increase in permanent employment.
- Internationally Traded and Financial Services sectors continued to grow strongly, increasing by 2,190 jobs (13.2%) to 18,825 in 1995. Financial Services (IFSC approved companies) at 2,554 jobs (up 2,525 from 1986) now account for 13.6% of the traded services total employment. The Financial Services increase in 1995 was 496 (24.1%).
- The Overall Job Gains(see *endnote 4 at end of document*) at 24,186 in 1995 are at the highest level since 1979. Levels of job losses at 14,212 are the lowest recorded level since 1978.
- On a regional basis each region, with the exception of the South East, recorded a positive net change in permanent employment during 1995.
- On a sectoral basis the highest positive net change in permanent employment in 1995 of 7,493 (10.2%) was recorded by Metals & Engineering.
- Temporary, Subcontract and Permanent Part-time employment increased by 3,166 to 23,952 (15.2%). Manufacturing companies accounted for 2,417 (76.3%) of the increase in employment. Internationally Traded and Financial Service companies now employ 2,750 in this category, an increase of 749, and 37.4% higher than 1994 levels.

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### 2.2 Highlights of past 10 years (1986 - 1995)

#### Full-Time Employment

- Overall permanent full-time employment in manufacturing and internationally traded and international financial services companies grew by 12.6% over the past 10 years (1986-1995).
  - Foreign companies grew by 23,225 (27.7%), while
  - Irish-owned(see *endnote 5 at end of document*) companies grew by 2,247 (1.9%) over the period.
- Permanent full-time manufacturing employment in 1995 was 12,147 (6.2%) higher than in 1986 (Chart 2,3). This compares with significant falls in other countries.
- Permanent full-time internationally traded and international financial services employment grew by 13,325 jobs over the period 1986-1995 (Chart 4).
- Overall net change in employment moved from a negative position of -3,616 in 1986 to a positive of 9,974 in 1995.

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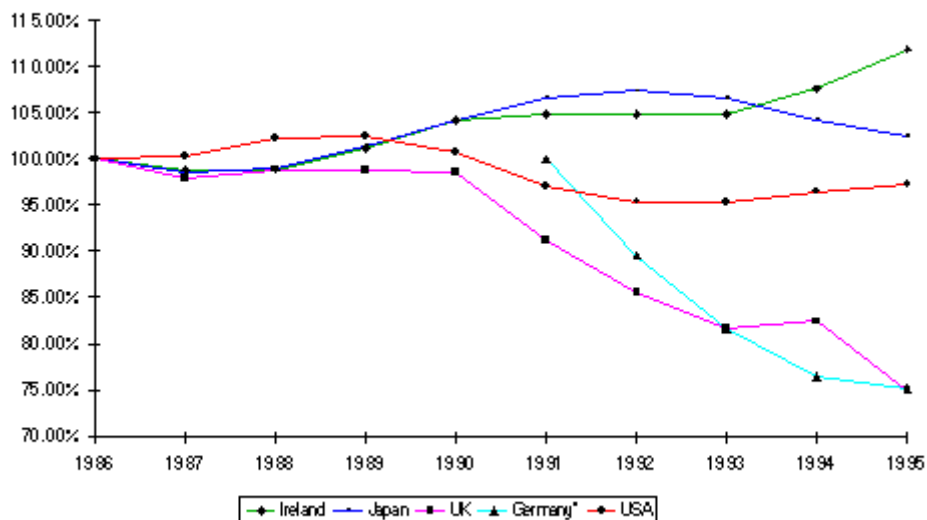
- Net change in Irish-owned companies moved from -3,734 to 3,553.
- Net change in foreign companies increased from 118 in 1986 to 6,421 (Chart 5,6,7).
- Overall job gains for the 10 year period have shown a rise of 43.7%. Job gains in 1995 of 24,186 are at the highest level since 1979.
  - Job gains at 12,079 in 1995 for Irish-owned companies are in line with 1990 peak levels.
  - Foreign industry achieved a level of 12,107 job gains in 1995.
- 1995 saw the lowest level of total job losses at 14,212 jobs. The rate of total job losses over the 10 years declined by over 30%, from 20,444 in 1986 to 14,212 in 1994.
  - Irish-owned industry job losses moved from 13,945 to 8,526, the lowest level ever.
  - Foreign industry job losses declined from 6,499 to 5,686.

## Temporary, Part-Time, Short Term Contract Employment

- Temporary, part-time and short term contract employment increased by 149% from 9,622 in 1987 (see endnote 6 at end of document) to 23,952 in 1995.
  - Manufacturing companies increased by 126% from 9,392 to 21,202.
  - Internationally traded and international financial services companies increased from 230 to 2,750, a twelve-fold increase over the period (Chart 8,9).
- Temporary, part-time and short term contract employment as a percentage of overall employment has increased from 4.5% in 1987 to 9.5% in 1995.

## 2.3 International trends in manufacturing employment:

Employment expressed as a percentage of 1986 level <sup>7</sup>



\* Germany (including East German employment); no combined data prior to 1991.

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<b>Manufacturing 1986-1995</b>	<b>1986</b>	<b>1988</b>	<b>1990</b>	<b>1992</b>	<b>1994</b>	<b>1995*</b>
<b>Ireland</b>	<b>185</b>	<b>183</b>	<b>193</b>	<b>194</b>	<b>199</b>	<b>207</b>
<b>U.K.</b>	<b>5,253</b>	<b>5,195</b>	<b>5,173</b>	<b>4,497</b>	<b>4,329</b>	<b>3,935</b>
<b>Germany</b>	<b>NA</b>	<b>NA</b>	<b>NA</b>	<b>8,040</b>	<b>6,866</b>	<b>6,750</b>
<b>USA</b>	<b>18,970</b>	<b>19,400</b>	<b>19,110</b>	<b>18,100</b>	<b>18,300</b>	<b>18,440</b>
<b>Japan<sup>o</sup> 1986-100</b>	<b>100</b>	<b>99.1</b>	<b>104.1</b>	<b>107.4</b>	<b>104.3</b>	<b>102.5</b>

**\*Estimate**

**(Source: OECD, including data for Ireland, for purpose of comparability)**

OECD figures show that Ireland is unique in displaying significantly increased manufacturing employment over the ten year period 1986 - 1995. The above chart highlights the growth in manufacturing employment in Ireland over the last ten years and contrasts this with the other major economies for which data is available.

Japan and Portugal were the only other countries to achieve employment growth of 2.5% and 0.2% respectively over the period, while the USA suffered a 2.8% reduction.

### **United States**

Manufacturing employment in the USA increased from 18.97 million in 1986 to 19.44m. in 1989, subsequently fell to 18.08m. in 1993 before recovering to 18.44m. in 1995.

### **Japan**

The employment trends in Japan were broadly similar to Ireland in the period 1986 to 1992. Since then Japan has reported a 4.8% reduction in the level of manufacturing employment.

### **Germany**

The most startling change has been evident in Germany. OECD statistics show that since unification in 1991 manufacturing employment in enterprises with 20 or more employees has reduced from almost 9 million to an estimated 6.75 million (*see endnote 9 at end of document*) (-24.9%) in 1995. In early 1996, Germany introduced a number of economic measures aimed at stimulating economic activity and growth.

### **United Kingdom**

The decline in the UK continues a trend evident since the early 1980's. In the past 10 years employment reduced from 5.25m. to 3.94m. This decline has become more pronounced since 1990, with a loss of 24% in the past 5 years.

By 1995 manufacturing employment in the UK was half the 7.87m. recorded in 1973.

Examination of other employment trends shows that Scandinavian countries suffered significant reductions in the range 14.5% to 22.8% in the 10 years but appear to have recovered in 1995 with growth rates of up to 6.7% on 1994 levels. See also Appendix 3 for data on other countries.

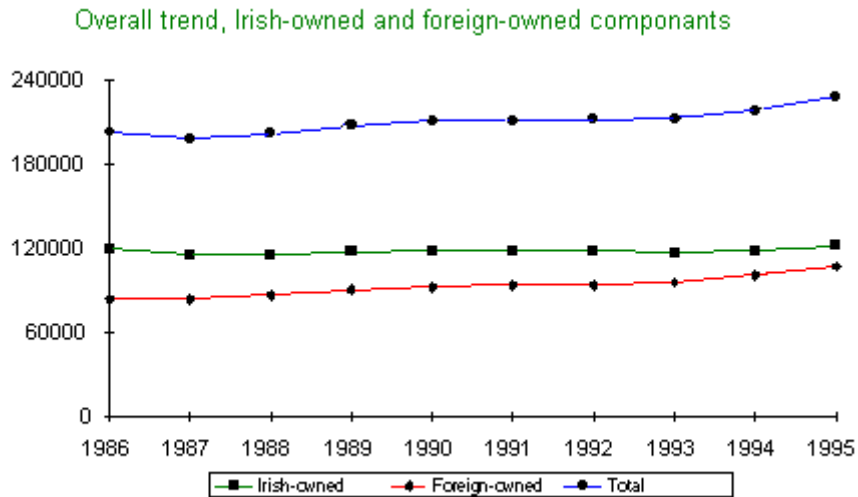
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## PERMANENT FULL-TIME EMPLOYMENT TRENDS

(Includes data on companies under the remit of Forbairt, IDA Ireland and Shannon Development)

Chart 1 Permanent full-time employment 1986-1995:



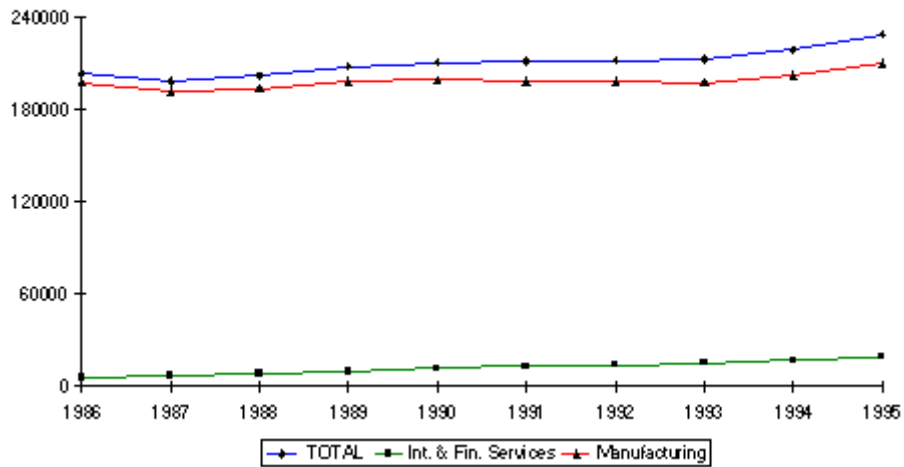
	1986	1988	1990	1992	1994	1995
<b>Total</b>	202,896	201,652	210,342	211,583	218,394	228,368
<i>Components:</i>						
<b>Irish-owned</b>	119,200	115,379	118,101	118,244	117,894	121,447
<b>Foreign-owned</b>	83,696	86,273	92,241	93,339	100,500	106,921

- **Overall permanent full-time employment** (i.e. for manufacturing and internationally traded and international financial services companies) increased by 25,472 (12.6%) over the ten year period 1986-1995. This year overall employment exceeded 228,000, an increase of 9,974 over 1994 levels.
- **Foreign-owned** companies accounted for **6,421 (64.4%)** of the net employment increase in 1995, with **Irish-owned** companies contributing **3,553 (35.6%)**.
- Over the past ten years, foreign companies grew by 23,225 (27.7%), with Irish-owned companies increasing by 2,247 (1.9%).

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**Chart 2 Permanent full-time employment 1986-1995:**

Overall trend, manufacturing and internationally traded services components

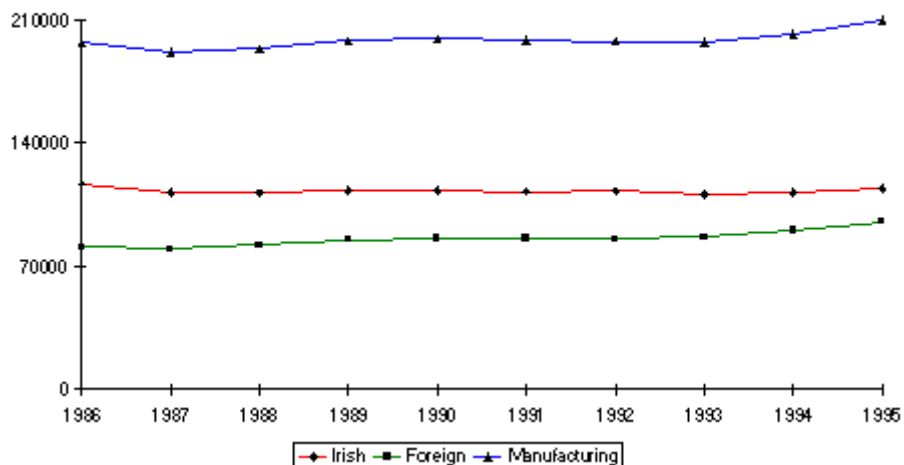


	1986	1988	1990	1992	1994	1995
<b>Total</b>	202,896	201,652	210,342	211,583	218,394	228,368
<i>Components:</i>						
<b>Manufacturing</b>	197,396	193,334	198,970	197,714	201,759	209,543
<b>Int. &amp; fin. ser.</b>	5,500	8,318	11,372	13,869	16,635	18,825

- Over the ten year period **permanent full-time manufacturing employment**, following an initial decline to 191,329 in 1987, has risen to 209,543 in 1995, 6.2% above the 1986 level.
- The rate of growth achieved in 1995 of c. 4 per cent is almost double the rate achieved in 1994.
- **Permanent full-time internationally traded and international financial services**(see *endnote 10 at end of document*) employment displayed consistent year on year growth from 5,500 in 1986 to 18,825 in 1995. This accounted for 13,325 (52.3%) of the rise in total employment over the 10 year period 1986-95.

**Chart 3 Permanent full-time manufacturing employment 1986 - 1995:**

Overall trends, Irish-owned and foreign-owned components



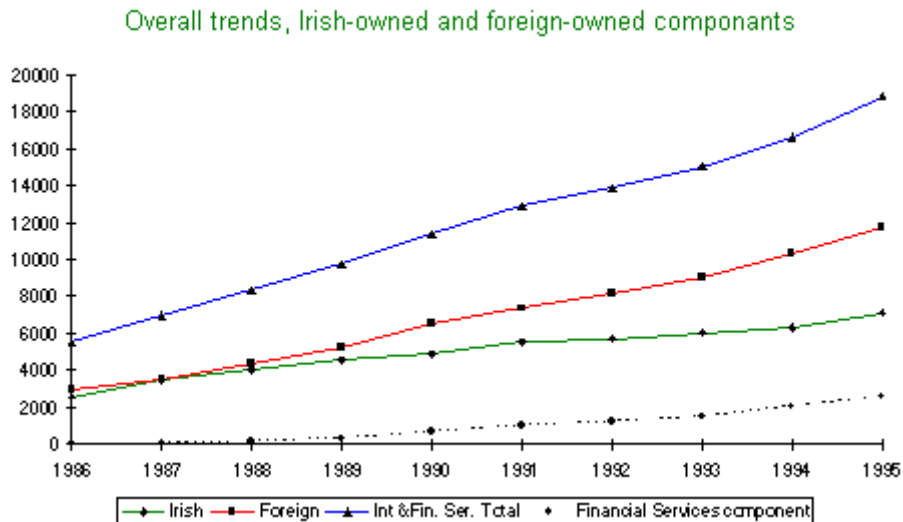


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	1986	1988	1990	1992	1994	1995
<b>Manufacturing</b>	197,396	193,334	198,970	197,714	201,759	209,543
<i>Components:</i>						
<b>Irish-owned</b>	116,645	111,396	113,244	112,538	111,592	114,335
<b>Foreign-owned</b>	80,751	81,938	85,726	85,176	90,167	95,208

- This chart divides employment between Irish-owned and foreign-owned companies.
- Permanent full-time employment in **Irish-owned manufacturing** firms, declined from 116,645 in 1986 to 110,543 in 1993, recovering to 114,335 in 1995. This represents 54.6% of the 1995 permanent full-time employment compared to 59.1% in 1986.
- Employment in **foreign-owned manufacturing** companies, after an initial decline in 1987, has displayed consistent growth to reach the level of 95,208 in 1995. Over the past 10 years employment in these companies has increased by 14,457 (17.9%) from 80,751 in 1986.

**Chart 4 Permanent full-time internationally traded and international financial services employment 1986 - 1995:**

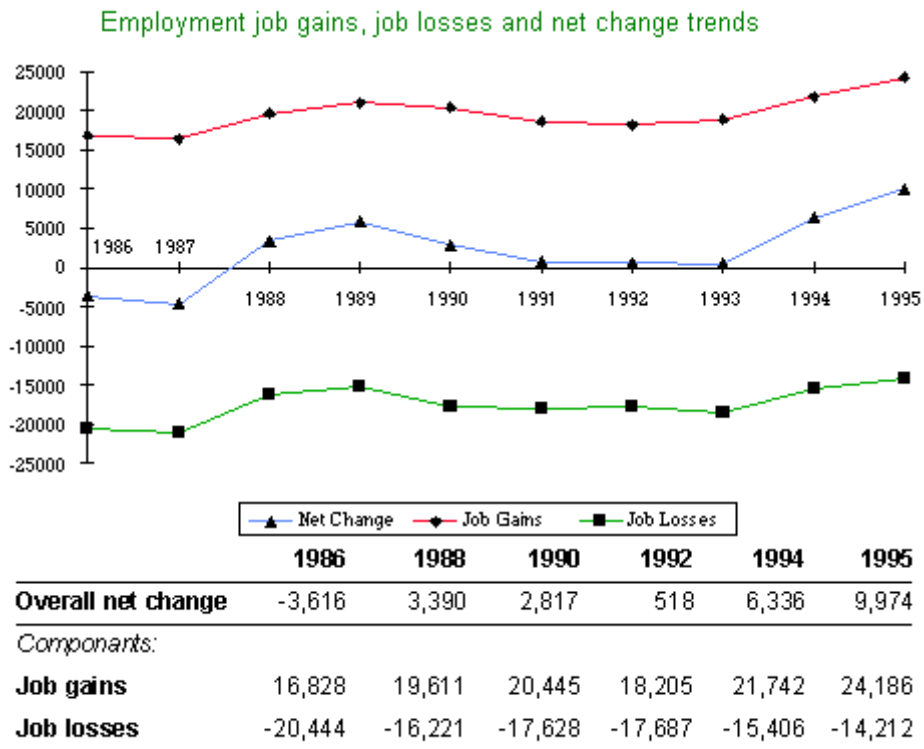


	1986	1988	1990	1992	1994	1995
<b>Int. &amp; fin. serv.</b>	5,500	8,318	11,372	13,869	16,635	18,825
<i>Components:</i>						
<b>Irish-owned</b>	2,555	3,983	4,857	5,706	6,302	7,112
<b>Foreign-owned</b>	2,945	4,335	6,515	8,163	10,333	11,713
<b>International financial services component</b>	29	157	652	1,209	2,058	2,554

- Irish-owned internationally traded and international financial service permanent full-time employment increased by 4,557 from 2,555 in 1986 to 7,112 in 1995. In 1995 the increase was 810 (12.9%).
- Foreign-owned internationally traded and international financial service permanent full-time employment increased by 8,768 from 2,945 in 1986 to 11,713 in 1995. In 1995 the increase was 1,380 (13.4%).
- International financial services (IFSC approved companies) at 2,554 jobs now accounts for 13.6% of the internationally traded services total employment. **The international financial services increase in 1995 was 496 (24.1%).**

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**Chart 5 Permanent full-time manufacturing and internationally traded and international financial services**

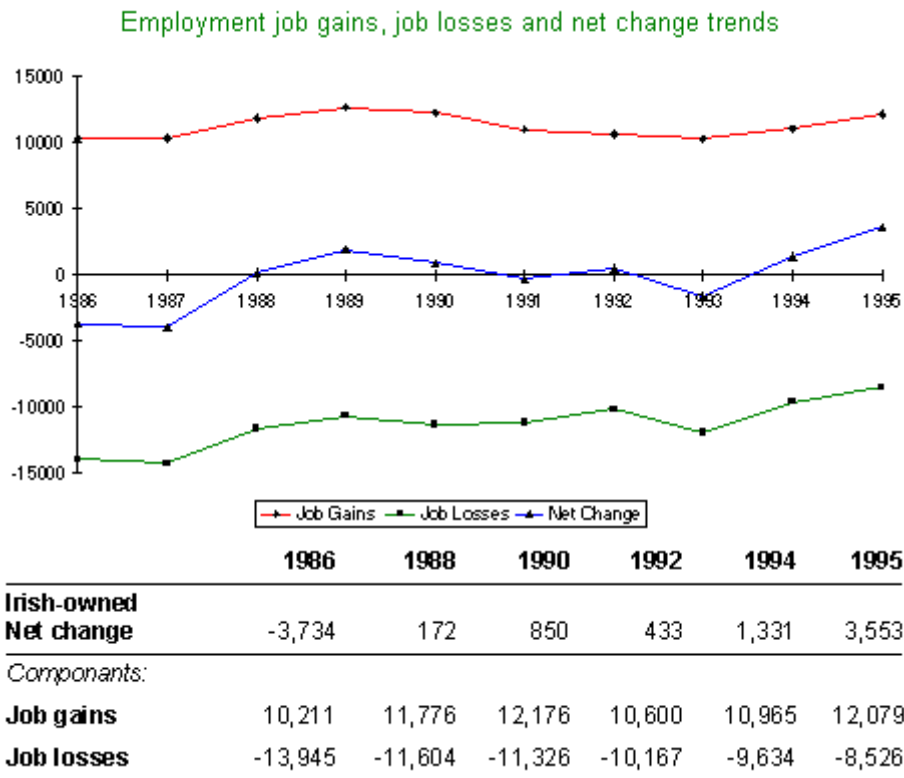


## 1986 - 1995:

- **Job gains** (gross gains) are the sum of the increase in employment for companies showing employment growth over the year. Gross gains include both grant-aided and non grant-aided companies.
- The level of total **1995 job gains** in manufacturing and internationally traded and international financial services reached the highest level in 10 years at 24,186, 11.2% above the 1994 figure.
- Job losses are the sum of the decrease in employment for companies showing an employment decrease over the year. The level of total **job losses** over the 10 year period declined by 30.5% from 20,444 in 1986 to 14,212 in 1995. This represents the lowest level of losses over the 10 years.
- Employment net change is the difference between total job gains and total job losses each year. Overall **net change** moved from -3,616 in 1986 to +6,336 in 1994. Net change recorded a further marked improvement this year rising to a level of +9,974 (57.4% above the 1994 level).

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**Chart 6 Permanent full-time Irish-owned manufacturing and internationally traded and international financial services**

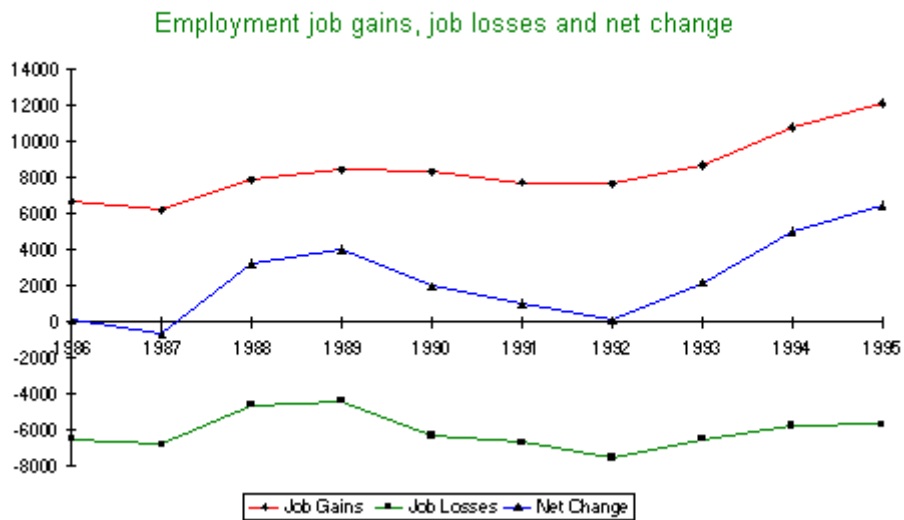


**1986 - 1995:**

- **Irish-owned manufacturing** companies reported 10,708 job gains in 1995, the highest level in over 5 years, while job losses at -7,965 were the lowest recorded level. (Not shown on above chart.)
- **Irish-owned internationally traded and international financial services** companies recorded the highest net change since 1987, with an increase of 810 (12.8%) jobs in 1995. The rate of job loss is lower than in the previous 5 years. Job gains at 1,371 in 1995 are at the highest level in over 10 years. (Not shown on chart.)

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**Chart 7 Permanent full-time foreign-owned manufacturing and internationally traded and international financial services trends 1986 - 1995:**



	1986	1988	1990	1992	1994	1995
<b>Foreign-owned Net change</b>	118	3,218	1,967	85	5,005	6,421
<i>Components:</i>						
<b>Job gains</b>	6,617	7,835	8,269	7,605	10,777	12,107
<b>Job losses</b>	-6,499	-4,617	-6,302	-7,520	-5,772	-5,686

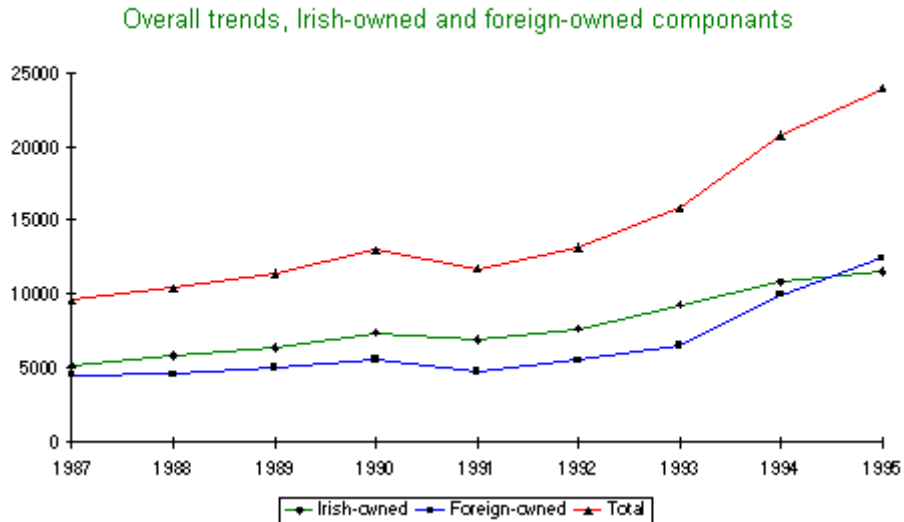
- **Net change** in foreign companies at 6,421 in 1995 exceeded last years level by 1,416 (28.3%).
- Likewise, **job gains** at 12,107 exceeded last years level by 12.3%. These gains when taken with the relatively low levels of job losses, -5,686, contributed to the overall employment increase in 1995.

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## TEMPORARY, PERMANENT PART-TIME AND SUBCONTRACT EMPLOYMENT TRENDS

(Includes data on companies under the remit of Forbairt and IDA Ireland)

Chart 8 Temporary, part-time and short term contract employment 1987 - 1995:



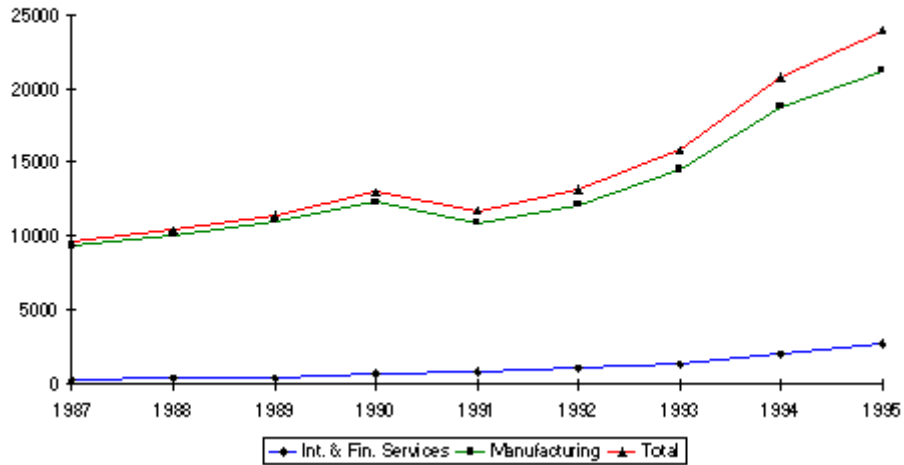
	1986	1988	1990	1992	1994	1995
<b>Total</b>	9,622	10,422	12,978	13,162	20,786	23,952
<i>Components:</i>						
<b>Irish-owned</b>	5,114	5,827	7,398	7,645	10,818	11,525
<b>Foreign-owned</b>	4,508	4,595	5,580	5,517	9,968	12,427

- Temporary, part-time and short term contract employment in **Irish-owned companies** displayed steady growth from 5,114 in 1987 (see *endnote 11 at end of document*) to 11,525 in 1995. Employment in 1995 grew by 6.5%.
- This type of employment in **Foreign-owned companies** grew from 4,508 in 1987 to 12,427 in 1995. Employment in 1995 grew by 24.7%. The number of temporary, part-time and short term contract employees in foreign-owned companies now exceeds those for Irish-owned companies for the first time.

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Chart 9 Temporary, part-time and short term contract employment 1987 - 1995:

Overall trend, manufacturing and internationally traded and international financial services components



	1986	1988	1990	1992	1994	1995
<b>Total</b>	9,622	10,422	12,978	13,162	20,786	23,952
<i>Components:</i>						
<b>Manufacturing</b>	9,392	10,080	12,290	12,137	18,785	21,202
<b>Int. &amp; fin. serv.</b>	230	369	688	1,025	2,001	2,750

- Since 1987 (see endnote 12 at end of document) **temporary, part-time and short term contract employment** has increased by 14,330 (149%) compared with a rise of 12.6% in permanent full-time employment.
- From a base of 9,622 in 1987 the number of jobs rose in the seven years by 64.5% to 15,829 in 1993. Since then more dramatic increases in this category of employment have occurred, with 8,123 temporary, part-time and short term contract jobs being created during 1994 and 1995. In 1995 a total of 23,952 jobs were reported, an increase of 51% since 1993.
- **48.1%** of these jobs are in **Irish-owned** companies.

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## APPENDICES 1-4

Appendix 1 (see endnote 13 at end of page)

**Table 3 Permanent full-time employment: regional trends**

Region	1986	1988	1990	1992	1994	1995	Change 94/95	% Change 94/95	% Change 86/95
Domegal	5,935	6,421	7,033	7,899	7,899	7,963	144	1.8	31.5
East	72,958	71,273	74,224	74,872	73,824	82,372	5,868	7.5	12.4
Middlelands	12,367	12,364	12,948	12,976	13,816	13,289	269	1.9	6.3
Midwest	26,996	28,426	26,882	28,957	28,956	29,962	1,006	4.9	12.7
North East	15,187	15,186	16,878	16,881	16,989	17,487	418	2.5	15.2
North West	4,188	4,164	4,254	4,887	4,636	4,888	284	4.4	18.0
South East	25,396	24,967	26,898	25,886	25,194	25,182	-12	0.0	-4.7
South West	26,381	25,883	27,032	27,882	29,994	30,181	787	2.4	14.4
West	12,844	12,183	14,879	14,223	14,716	15,732	1,016	6.9	28.6
<b>Total</b>	<b>282,896</b>	<b>281,632</b>	<b>298,282</b>	<b>291,989</b>	<b>298,396</b>	<b>298,368</b>	<b>2,974</b>	<b>6.6</b>	<b>12.6</b>

**Table 4 Permanent full-time employment: sectoral trends**

Sector	1986	1988	1990	1992	1994	1995	Change 94/95	% Change 94/95	% Change 86/95
Non-Metals Minerals	13,274	11,422	11,716	10,797	9,999	9,998	-899	-3.1	-37.0
Chemicals	13,594	13,688	14,788	16,896	17,695	18,416	761	4.3	35.5
Metal & Engineering	99,415	61,389	68,136	68,979	73,436	88,329	7,493	10.2	36.2
Food	41,238	48,438	37,777	38,192	38,376	38,377	1	0.0	-6.9
Drink and Tobacco	9,828	8,884	7,143	6,984	5,967	6,188	141	2.4	-32.3
Textile Industry	9,285	9,495	9,768	9,135	9,881	8,697	-884	-4.2	-5.5
Clothing, Footwear & Leather	17,277	14,869	14,472	12,218	11,174	10,767	-407	-3.6	-37.7
Timber & Furniture	9,712	8,913	9,227	8,984	9,825	9,122	97	1.1	-6.1
Paper & Printing	13,149	13,588	14,188	14,328	14,184	13,618	-466	-3.4	3.6
Wood/Plastics Instruments	9,996	10,044	10,467	10,898	11,494	12,138	696	6.1	26.9
Non- Manufacturing Grant-aided	6,115	8,888	11,332	14,436	17,738	19,975	2,245	12.7	226.7
Mining and Quarrying	1,347	1,128	891	742	519	599	88	3.9	-68.0
<b>Total</b>	<b>282,896</b>	<b>281,632</b>	<b>298,282</b>	<b>291,989</b>	<b>298,396</b>	<b>298,368</b>	<b>2,974</b>	<b>6.6</b>	<b>12.6</b>

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Appendix 2 (see endnote 14 at end of page)

**Table 5 Temporary, part-time and short term contract employment: regional trends**

Region	1987	1988	1990	1992	1994	1995	Change 94/95	% Change 94/95	% Change 87/95
Demerol	333	349	351	451	1060	915	-153	-14.3	174.8
East	3,725	3,759	4,009	4,729	7,982	7,228	1,228	15.5	146.4
Midlands	439	435	617	733	1,497	1,370	-119	-7.9	204.2
Midwest	387	293	323	373	1,119	1,320	701	62.6	238.1
North East	370	707	332	603	1,093	1,072	-21	-1.9	65.5
North West	251	209	410	347	377	394	17	4.5	55.7
South East	1,114	1,430	1,433	1,664	2,700	2,300	-399	-14.8	108.3
South West	1,752	2,660	2,200	2,442	4,497	5,430	933	20.7	197.9
West	709	366	305	270	253	775	522	206.3	8.0
<b>Total</b>	<b>9,612</b>	<b>10,622</b>	<b>12,970</b>	<b>13,662</b>	<b>20,706</b>	<b>22,952</b>	<b>2,166</b>	<b>15.2</b>	<b>149.2</b>

**Table 6 Temporary, part-time and short term contract employment: sectoral trends**

Sector	1987	1988	1990	1992	1994	1995	Change 94/95	% Change 94/95	% Change 87/95
Non-Metals Miscellaneous	370	663	567	629	603	690	77	1.0	62.5
Chemicals	320	605	1,057	1,107	1,499	1,602	103	12.2	223.5
Metal & Engineering	3,012	2,730	3,124	3,447	6,916	3,004	-2,900	-42.2	190.9
Food	3,110	3,444	4,567	4,177	5,066	5,074	108	2.1	76.0
Dink and Tobacco	404	431	393	303	697	351	-346	-49.5	36.4
Textile Industry	424	320	307	429	663	394	-269	-40.6	40.1
Clothing, Footwear & Leather	347	311	432	315	305	394	89	2.7	39.9
Timber & Furniture	233	201	274	261	275	317	42	15.3	36.1
Paper & Printing	399	419	509	677	600	1,096	396	65.6	174.7
Miscellaneous Industries	406	376	641	376	654	1,125	471	71.7	131.5
Non- Manufacturing Grant-aided	251	395	743	1,124	2,300	2,012	-288	-12.5	1020
Mining and Quarrying	40	45	24	37	78	79	1	1.3	38.1
<b>Total</b>	<b>9,612</b>	<b>10,622</b>	<b>12,970</b>	<b>13,662</b>	<b>20,706</b>	<b>22,952</b>	<b>2,166</b>	<b>15.2</b>	<b>149.2</b>



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### Appendix 3

#### International Employment Trends

COUNTRY	1988	1994	1995*	% Change 88/95	% Change 94/95
<b>*000</b>					
<b>Manufacturing</b>					
Ireland	185	199	207	11.9	4.0
U.K.	5,253	4,329	3,935	-25.1	-9.1
Germany	N/A	6,666	6,750	-24.9*	-1.7
USA	18,970	18,300	18,400	-2.8	0.8
Norway	359	303	307	-14.5	1.3
<b>Manufacturing 1986=100</b>					
Switzerland	100	88.1	85.1	-14.9	-1.0
Japan	100	104.3	102.5	2.5	-1.8
<b>Manufacturing and Mining</b>					
Austria	559	470	466	-16.6	-0.9
<b>Industrial</b>					
Sweden	1,030	762	799	-22.4	4.8
Spain	2,330	2,110	2,124	-8.8	0.7
Italy	5,659	5,404	5,288	-6.4	-2.0
Finland	589	426	454	-22.8	6.7

\*Estimate (Germany reflects % change 1991/1995)

(Source: OECD, including data for Ireland, for purpose of comparability)

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## Appendix 4

### Overview of methodology and definitions of terms used and description of data available

This survey is carried out by card or telephone depending on the region (larger regions tend to have a postal survey because of the number of companies involved).

In line with previous years, census returns as at the last Friday in October (27th this year) for permanent and for temporary, part-time and short term contract employment combined were sought.

In the presentation of results we have reflected the nationality of companies at the time of reporting. In the light of changes of ownership, the inclusion of new companies and the correction of identified errors, historic employment figures have been restated. This means that figures will differ slightly from previously reported levels.

The following are definitions for terms used in this report:

**Permanent full-time:** Employees who will have been employed full time for nine months or longer or who will be on contracts of nine months or longer on 27 October

**Temporary employment:** Employees who will have been employed for less than 9 months in the 12 months to 27 October or who are on employment contracts of less than 9 months or employed on a casual basis.

**Part-time:** Employees who work on a continuous basis on agreed shorter working hours (less than twenty-five hours a week) but who are employed on 27 October. For example, job sharing or short extra shift staff.

**Short term contract:** Employment under contracts of less than 9 months for services provided. Include only those who are employed on 27 October and:

- work **solely** for the Company
- are **located in the factory/on site**
- are **subject to Irish-owned taxation/PRSI**
- are **on contracts of nine months or longer.**

**Job gains:** Increase in employment, on a company by company basis, arising in the survey year over and above the company's employment level in the previous year. Job gains include both grant-aided and non-grant-aided companies.

**Job losses:** Decrease in employment on a company by company basis, arising in the survey year.

**Net change:** Difference between the total job gains and the total job losses in the survey year.

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Data available for inclusion in this report is as follows:

Permanent full-time employment and temporary, permanent part-time and short term contract employment in companies under remit of Forbairt and IDA Ireland.

Permanent full-time employment in companies under remit of Shannon Development.

Estimates of Údarás na Gaeltachta manufacturing and internationally traded services employment data are included in Section 1, but excluded from the remainder of the document as it has not yet been fully incorporated into the Forfás database. It is planned to complete this work in 1996. Future documents will incorporate the full detail for all the agencies.

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## Endnotes

1. An overview of the survey, together with its methodology and definitions used for each employee category and a description of the data available from the different agencies is provided in appendix 4. Historic employment figures have been restated and differ slightly from previously reported levels due to the inclusion of new companies and the transfer of ownership of companies during 1995.
  2. Údarás na Gaeltachta figures are not yet recorded on the Forfás database.
  3. Includes companies under Forbairt and IDA Ireland remit.
  4. Job Gains are the sum of the increase in employment for companies showing employment growth over the year. Appendix 4 outlines all definitions.
  5. Irish-owned defined as companies with 50% plus Irish-owned shareholding.
  6. Survey data for this category of employment was collected for the first time in 1987.
  7. Except Germany where employment is expressed as a percentage of the 1991 level.
  8. Japanese employment expressed as an index in OECD statistics.
  9. OECD main economic indicators for 1995 and 1996 have not reported the 1995 employment trends for Germany. The reduction of 1.7% used in this report is estimated using data from Statistisches Jahrbuch, Wiesbaden and from Bundesanstalt fuer Arbeit in Nuernberg.
  10. Includes Shannon Development international service and distribution companies.
  11. Survey data for this category of employment was collected for the first time in 1987.
  12. Survey data for this category of employment was collected for the first time in 1987.
  13. Data includes Forbairt, IDA Ireland and Shannon Development.
  14. Data includes Forbairt, IDA Ireland.
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