# Social Implications of Precarious Work Project

## Mapping precarious work in Ireland: a preliminary sectoral analysis

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**Alicja Bobek, James Wickham and Sinead Pembroke**

### Introduction – defining precarious work

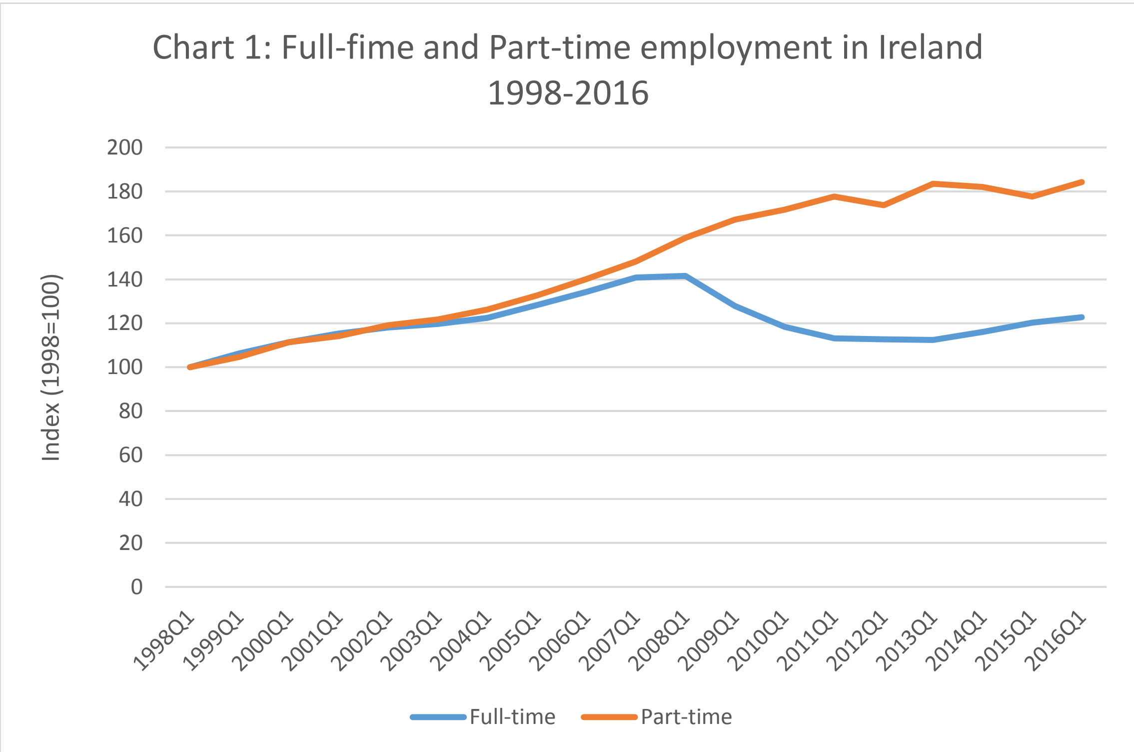
The term 'precarious work' is usually used in relation to an employment relationship which is contractually different from the standard, full-time, permanent arrangement. Three main types of such atypical employment are: part-time work, temporary work and solo self-employment. It needs to be emphasised, however, that not all part-time jobs are precarious as this category includes employees who have relatively secure employment with regular hours and permanent contracts. Precariousness characterises only a sub-category of part-time employees who work irregular or variable hours. People in these jobs are usually paid for the hours that they actually work and therefore their income is insecure in short- and medium-term basis. Temporary work, on the other hand, can be characterised by a medium- and long-term insecurity as individuals can predict their income only for a certain period of time, but not for a more distant future.

Finally, solo self-employment is also temporary as contracts are generally task-based. These tasks can end at any point in time.

## 1. Precarious work in Ireland

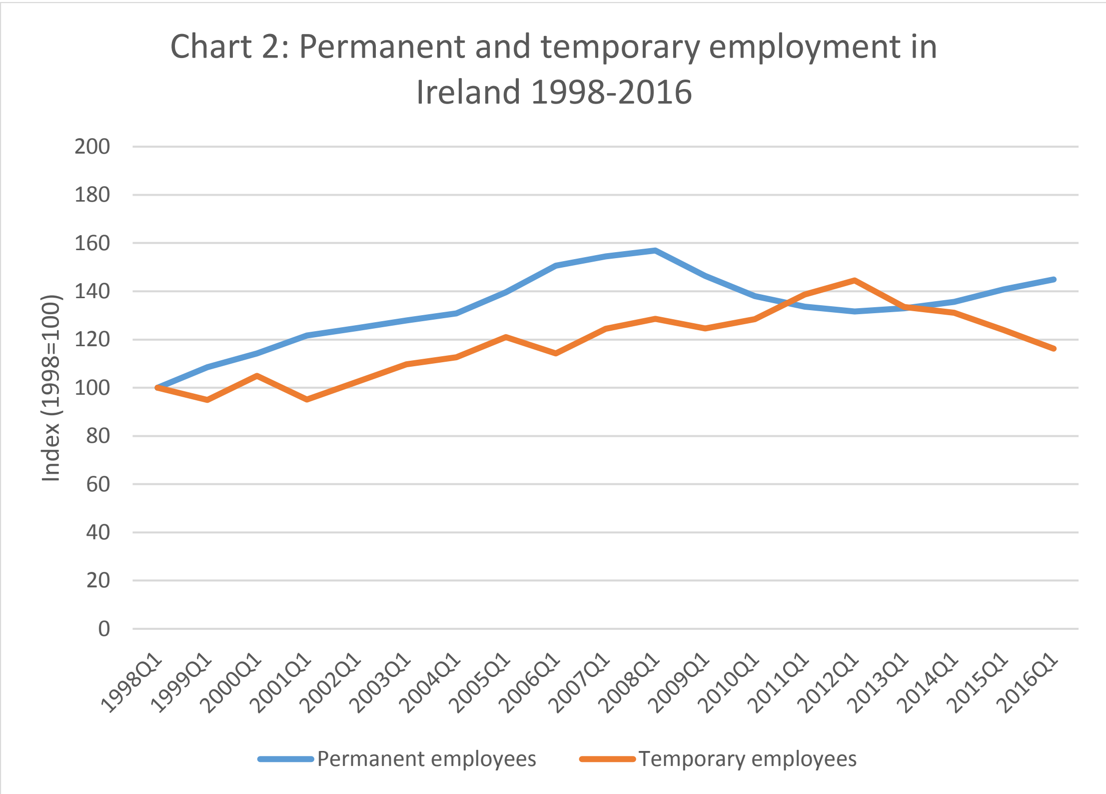
The existing Irish statistics allow us to analyse change in the volume of this 'objectively' or 'contractually' precarious work for two types of atypical employment: temporary and solo self-employment. The part-time category is aggregated in the available CSO database (QHNS) and does not differentiate between secure, regular part-time, and irregular, variable (if-and-when or zero-hours contracts). It may be possible to capture this distinction from the micro-data, however for the purpose of this analysis we refer to all part-time work, with an assumption that at least a certain proportion of employment in this category can be characterised as precarious.

In terms of overall employment, part-time work grew before the recession; however the rise in the share was moderate prior to the downturn: in 1998 16.7 percent of all employment was part-time, while in 2007 the percentage grew to 17.4. It then reached its peak in 2011 when 24.6 percent of employees worked on a part-time basis. It fell subsequently and by the first quarter of 2016 it had reached the level of 23.1 percent. In terms of the volume, however, the growth of part-time work was relatively fast, which is illustrated by the following graph:



There is also evidence that while the proportion of overall part-time work did not change dramatically over the last 10 years, its nature shifted. In our Working Conditions in Ireland project we found that the hospitality sector now heavily relies on irregular part-time employment. This could also be the case of other sectors (for example retail), but this issue will require further investigation.

The share of temporary work fluctuated over the last two decades. In 1998 9.2 percent of the workforce worked on short-term contracts; this proportion fell to 7.4 percent in 2006. It then grew after the downturn and reached its peak of 10.3 percent in 2012. At the moment 7.7 percent of the overall employment is temporary. The following graph illustrates the growth of the volume of temporary work in comparison with permanent employment:




There are four types of temporary employment recorded by the CSO: (a) casual work; (b) seasonal work; (c) work lasting only until a particular task or tasks are completed (d) work lasting only a specific duration. The number of those in casual employment was relatively high in 1998 and stood at 43 percent of the overall temporary work; this proportion dropped to 35 percent by the first quarter of 2016. Seasonal work also fell from 8 percent in 1998 to 6 percent in 2016. The proportion of those in the category (b) and (c), which can be broadly characterised as specific purpose/specific duration contracts grew: in 1998 this proportion was 50 percent of the overall employment while in 2016 it stood at the level of 57 percent. It needs to be emphasised, however, that between the years of 2000 and 2012 relatively high proportion (between 35 and 46) were categorised as ‘not stated’ and therefore a detailed analyses of the change in nature of the temporary work before and after the downturn is not possible at the moment.

Overall self-employment (with and without paid employees) has remained at a similar level since 1998 when it stood at 19 percent of overall employment. Currently 17 percent of workers are self-employed. Solo self-employment (i.e. self-employed without any employees) as a proportion of all employment statuses fell marginally from 13 percent in 1998 to 10 percent in 2006. It grew marginally after the downturn and accounted for 12 percent of all employment status in the first quarter of 2016. Solo self-employment as a proportion of overall self-employment, however, has grown more since 2010 when it was at a level of 67 percent (same as in 1998). By the first quarter of 2016, 73 percent of all self-employed did not have any paid employees. This growth can be a result of either self-employed workers losing all their employees or an increase in new solo self-employed (people who were previously unemployed or working as employees). In the Working Conditions Project it became evident that in the construction industry both processes were taking place, however other sectors also need to be examined. The following chart illustrates the change in volume of the two types of self-employment in relation to the growth of employees.


While part-time work grew relatively fast in the economic downturn (and has been still rising through the recovery) the other two types of atypical work were less affected by the recession in relation to overall employment. However, we expect that there are particular sectors of the Irish labour market that are prone to have more atypical work within them. Examples include casual work in hospitality, part-time hourly work in health (care workers), on-call employees in transport (couriers), or graduates working on temporary contracts in ICT or Education, or trade workers who are solo self-employed in construction. The following analysis will focus on sectors which have a proportion of at least one atypical work category higher than then the national average. These are as follows:

**Table 1: Sectors with high percentage of atypical employment**

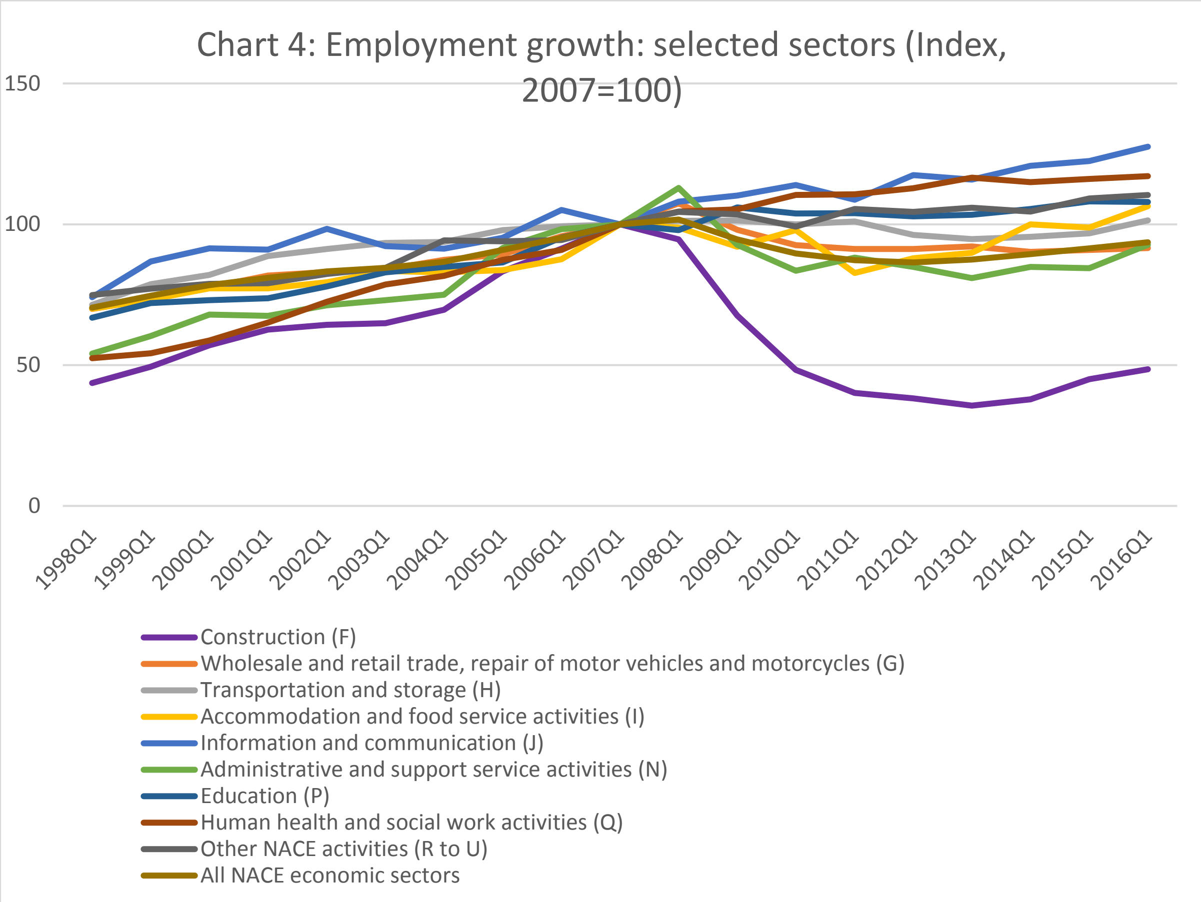
| | Part time | Temp | Solo self-employment (as proportion of overall self-employment) | Overall self-employment |
|---|---|---|---|---|
| Construction | 16.30% | 11.50% | 72% | 35% |
| Wholesale and Retail | 33.30% | 8% | 42% | 12% |
| Accommodation | 38.50% | 11.20% | 35% | 11% |
| Transportation and storage | 15.50% | 4.80% | 80% | 15% |
| Admin and support | 35.20% | 9.20% | 72% | 12% |
| ICT | 7.20% | 6.60% | 84% | 13% |
| Human Health | 32.30% | 7.20% | 65% | 5% |
| Education | 23.50% | 12% | 81% | 5% |
| Other | 38.70% | 11.30% | 76% | 26% |
| | | | | |
| National average | 24 | 7.7 | 72 | 16 |

*Note: highlighted cells indicate rate of atypical employment higher than national average, with darker shades assigned for cells with very high rates*

As the above table demonstrates, four sectors scored higher than the national average on only one dimension of precarity: transportation and storage, ICT, human health and education. The first two sectors had high levels of solo self-employment, while human health was characterised by a high proportion of part-time work. Education had a proportion of temporary work higher than the national average. All the other sectors had two or more dimensions at a relatively high level, with the category 'Other NACE sectors' (which includes such occupations as hairdressers, sports facilities workers and art workers) scored high on all three.

## 1. Precarious sectors: detailed analysis

While it could be argued that the employment might have been negatively affected by the recession in all the sectors, the actual numbers of people working in them did not necessarily fall (with the exception of the construction industry and administration and support). The following graph illustrates change in employment volumes in relation to the overall employment, with 2007 as the reference point (100):



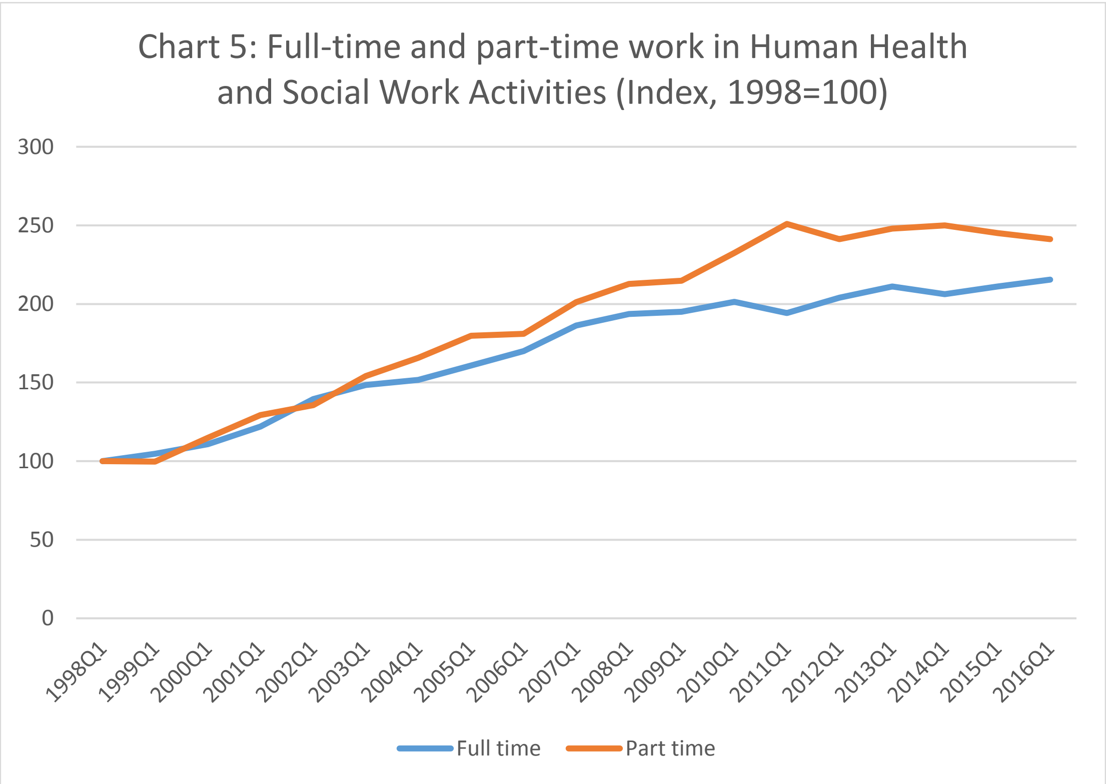

While the number of those employed in construction fell dramatically after 2008, the situation in all other 8 sectors has been more complex. ICT and Health, for example, actually continued growing despite the economic downturn. Employment in the other sectors declined initially, however the numbers have been gradually rising through the recovery, with the accommodation and food services as the best example of such growth.

Different aspects of employment in these nine sectors will be explored in detail in the following sections. The analysis will start with changes in the share of the dominant atypical category of work and therefore the sectors are grouped by the relatively high share of part-time work, temporary contracts, solo self-employed or a combination of two or more of these. The breakdown of detailed industrial groups will also be included. This will allow us to identify possible occupations which are likely to be precarious. This will be followed by the analysis of possible change in occupational groups which will allow us to examine whether or not any polarisation has occurred since the recession (especially in terms of the growth at the bottom of the occupational structure). As there is a common assumption that the rise in a proportion of females and/or migrants leads to the casualization of certain jobs, we will also examine shifts in the workforce composition in relation to gender and nationality.. The analysis is based on our own calculations from the QHNS Statbank, with the exception of the detailed industrial group which is based on the 2011 Census of Population.

Sectors with high rates of part-time work

Human health was the only sector that has high rates of part-time work and relatively low rates of other atypical forms of employment. In general, employment in this sector grew steadily since the late 1990s and this growth was not affected by the economic downturn. In 1998 there was 111.4 thousand people employment in human health and social work activities; by 2016 it almost doubled at reached a level of 248.7 thousand people. At the moment it is the second largest sector of employment in Ireland.

The share of part-time work in Human Health and Social Work also grew steadily: it started at 29.8 percent in 1998 and reached its peak of 35.4 percent in 2011. It has fallen slightly since then and it stood at the level of 32.2 percent in the beginning of 2016. The volume of part-time work, however, grew faster than the full-time, which can be illustrated by the following graph:



In terms of the detailed industrial group, the breakdown for this sector is as follows:

**Healthcare (2011)**

| | |
|---|---|
| Residential care and social work activities (87,88) | 82,878 |
| Hospital activities (8610) | 82,627 |
| General medical practice activities (8621) | 17,112 |
| Other human health activities (8690) | 9,870 |
| Dental practice activities (8623) | 4,856 |

As illustrated in the above table, residential care and social work activities are the largest group, followed by hospital activities. We expect that the first two groups would be more likely to be a subject of atypical contracts (part-time and on-call) and therefore there might be some precarious employment affecting these workers. Considering the recruitment freeze in the public sector, there is also a possibility of a growth in agency work amongst nurses, however at this stage we only have anecdotal evidence of such practices.

Since the recession there has been no major shifts in occupational groups:

| **5Human health and social work activities (Q)** | **2007Q1** | **2016Q1** |
|---|---|---|
| 1 ,Managers, directors and senior officials | 2% | 3% |
| 2 ,Professional | 42% | 35% |
| 3 ,Associate professional and technical | 7% | 8% |
| 4 ,Administrative and secreterial | 8% | 12% |
| 5 ,Skilled trades | 2% | 2% |
| 6 ,Caring, leisure and other services | 33% | 34% |
| 7 ,Sales and customer service | 0% | 0% |
| 8 ,Process, plant and machine operatives | 0% | 0% |
| 9 ,Elementary | 6% | 4% |
| X1 ,Other/Not stated | 0% | 0% |

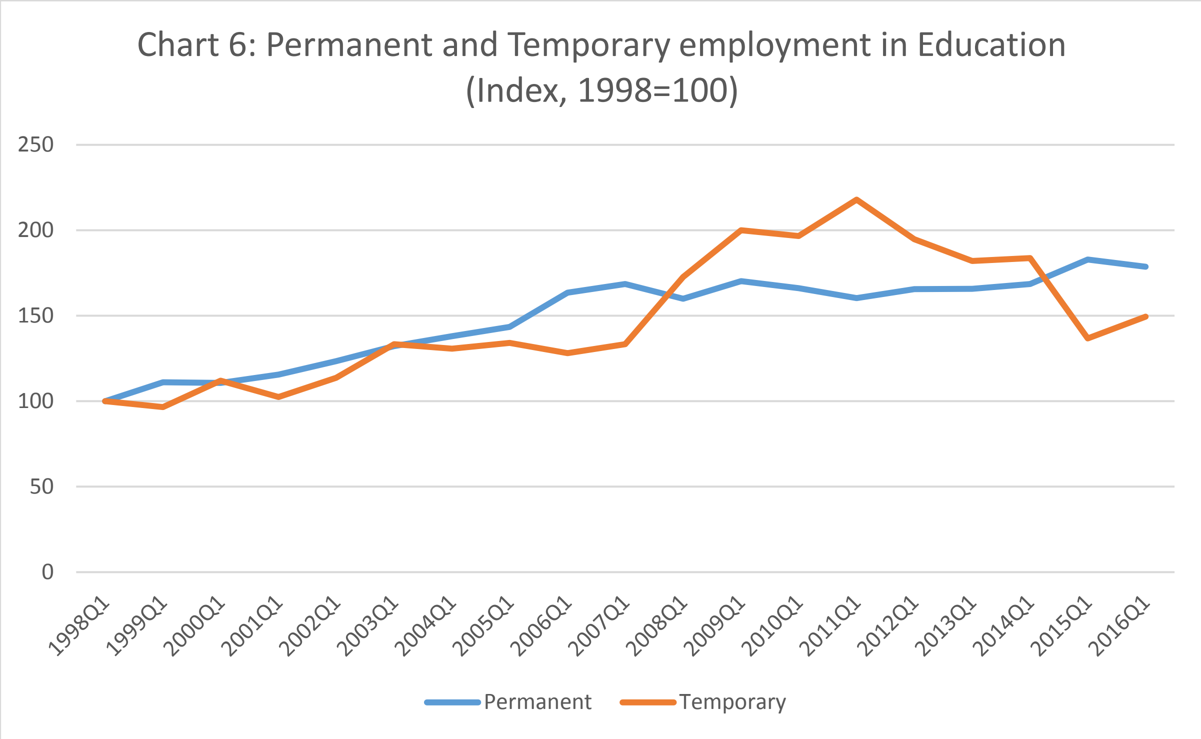
As illustrated in the above table, there was a decrease in the professional category between 2007 and 2016. The increase in share, however, did not occur at the bottom of the scale, and it was the administrative and secretarial grade that grew by 4 percent.

This sector is highly feminized as 81 percent of those working in human health and social work are women. This proportion has not changed dramatically over the last two decades, despite the massive growth in the number of people employed in this sector: in 1998 females accounted for 79 percent of the human health and social care workforce. The share of migrants was also relatively high between 2007 and 2013 when non-Irish nationals accounted for around 15 percent of all employed in this sector. This fell to 10 percent by the first quarter of 2016. Roughly half of this number constitutes of non-EU migrants; this can be related to the recruitment drives for non-EU doctors and nurses which took place prior to the recession.

Sectors with high rates of temporary work

Education had the highest rate of temporary work amongst all the sectors of the Irish labour market, with a rate of 12 percent at the beginning of 2016. Employment in this sector also grew steadily since 1998, however the growth was slower than in the health sector. In 2009 there was 95.3 thousand people employed in education, and the overall employment in this sector reached its peak of 151.2 in 2009. This number declined after the economic crash and fell to 147.5 in 2013, which can be linked to the recruitment freeze in the public sector. Employment in education has recovered since and there are currently 153.9 people employed in this sector.

Temporary work in this sector grew moderately during the boom from 12.9 percent in 1998 to 13.3 percent in 2005. It then fell and was at the lowest level of 11.3 percent in 2007. After the crash the proportion of temporary employment in education grew dramatically and reached a high level of 18.8 in 2011, which was almost double the national average. It fell since then and is now at a level of around 12 percent. The following graph illustrates these changing trends in temporary and permanent employment in this sector:




Detailed breakdown of the industrial group for 2011 was as follows:

**Education (2011)**

| | |
|---|---|
| Primary education (8520) | 50,064 |
| Secondary education (853) | 43,436 |
| Higher education (854) | 30,128 |
| Other education and educational support activities (855,856 ) | 27,012 |
| Pre-primary education (8510) | 16,650 |

As illustrated in the above table, the highest proportion worked in the three groups: primary, secondary and tertiary education. As will be further analysed, the largest occupational group in this sector were professionals, and therefore we expect that the rise in temporary work was related to the growth of fixed-term contracts for such groups as teachers or lectures. This can also be linked with the recruitment freeze in the public sector after the downturn.

While the share of temporary work in education fluctuated highly since the recession, the occupational structure has not changed:

| | 2007Q1 | 2016Q1 |
|---|---|---|
| **Education (P)** | | |
| 1 Managers, directors and senior officials | 0% | 0% |
| 2 Professional | 67% | 64% |
| 3 Associate professional and technical | 6% | 6% |
| 4 Administrative and secretarial | 7% | 8% |
| 5 Skilled trades | 1% | 0% |
| 6 Caring, leisure and other services | 12% | 13% |
| 7 Sales and customer service | 0% | 0% |
| 8 Process, plant and machine operatives | 0% | 0% |
| 9 Elementary | 4% | 4% |
| X1 ,Other/Not stated | 0% | 0% |

As illustrated in the above table, there was a slight decrease in the professional category; however professionals are still the largest group in the Education sector. This may suggest precarisation of workers in the higher-skilled category.

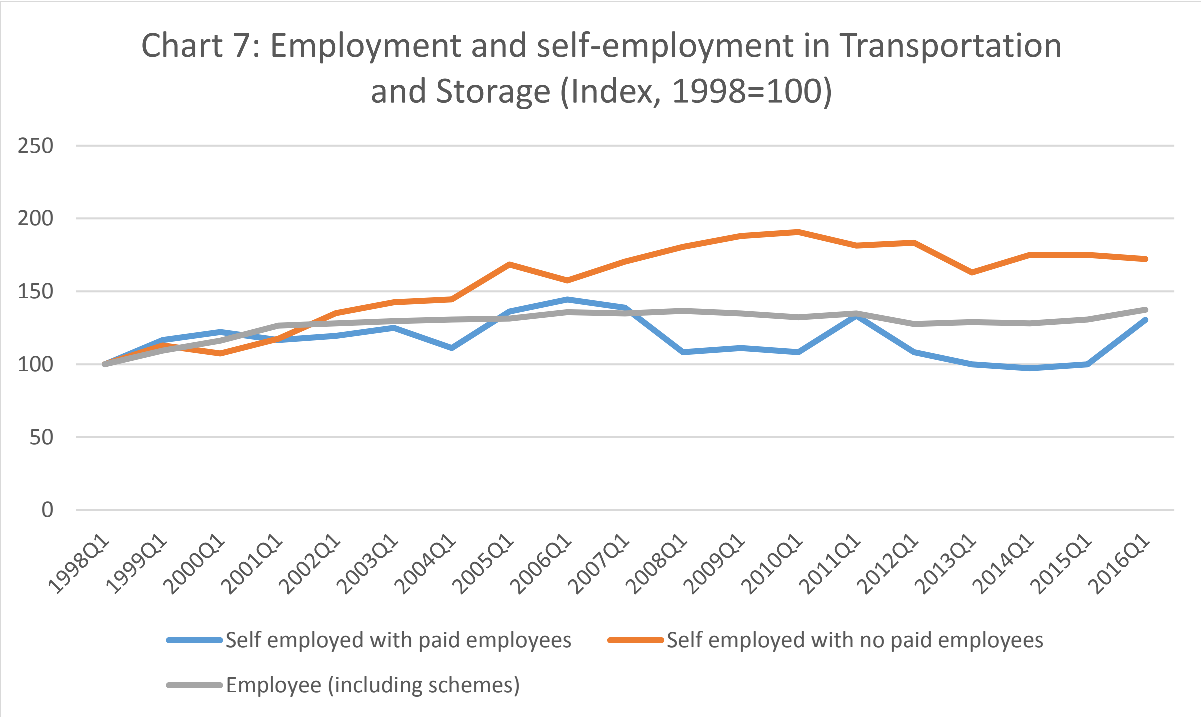
This sector is also characterised by a relatively high female share. In 2016, 76 percent of those working in education were women. This was a rather significant growth since 1998, when females accounted for 65 percent of those employed in this sector; by 2007 this share grew to 73 percent. The share of non-Irish workers was lower than the national average with 94 percent of the education workforce being Irish in 2016. There was no major change over the past two decades: in 1998 Irish nationals accounted for 92 percent of all employed in this sector.

Sectors with high rates of self-employment

Transportation and storage has a relatively high level of solo self-employment, while part-time and temporary work in this sector is lower than the national average. Overall the number of people working in this sector grew from 66.9 thousand in 1998 to 95 thousand in 2016. The economic downturn did not have a significant effect on the size of the workforce in the sector. At the peak in 2008 there was 94.8 thousand people working in transportation in storage; this number fell gradually to 88.8 in 2013. It has grown steadily since.

25 percent of those employed in transportation and storage work as self-employed. There was no drastic change since 1998, when the overall self-employment in transportation and storage

was at the level of 22 percent. The percentage of solo self-employment, however, has grown since. It was at the highest level of 84 percent of the total self-employment in the years 2009-2010, and 2014-2015. This number has fallen to 80 percent in 2016, compared to 74 percent in 1998. In relation to the overall workforce in this sector, solo self-employment accounts for 19.5 percent of all employment status. The volume and growth of the self-employment can be illustrated by the following graph:




The detailed breakdown of the industrial groups is as follows:

| | |
|---|---|
| **Transport and Storage** | |
| Postal and courier activities (53) | 15,062 |
| Taxi operation (4932) | 14,804 |
| Freight transport by road and removal services (494) | 12,858 |
| Other passenger land transport n.e.c. (4939) | 10,053 |
| Air transport (51) | 6,469 |
| Other transportation support activities (5229) | 4,190 |
| Warehousing, storage and cargo handling (5210,5224) | 3,697 |
| Transport via railways (491,492) | 2,852 |
| Water transport (50) | 1,703 |
| Transport via pipeline (4950) | 4 |

Postal and courier activities constitute the largest group in this sector. While we expect that a certain proportion of those working in this category has a stable employment (for example An

Post workers), there is evidence of precarisation in some courier activities (for example Deliveroo workers). High number of self-employment can be probably explained by the fact that the second largest group are taxi drivers, who are mostly self-employed. Furthermore, couriers can be employed directly, although may be on irregular hours. While part-time work was lower than the national average in this sector, it needs to be emphasised that it has risen sharply since the recession: in 2008 only 10 percent of those in transportation and storage worked part-time, and this number was not much higher than in 1998 when it stood at 9.7 percent. By the first quarter of 2016, however, part-time work accounted for 16.5 percent of the overall employment in this sector. This may suggest precarisation of certain occupations in this sector, which can be linked to the recession.

In relation to the occupational structure, there were some minor changes since the recession:

| | | **2007Q1** | **2016Q1** |
|---|---|---|---|
| **Transportation and storage (H)** | | | |
| | 1 Managers, directors and senior officials | 7% | 8% |
| | 2 Professional | * | * |
| | 3 Associate professional and technical | 5% | 6% |
| | 4 ,Administrative and secretarial | 13% | 10% |
| | 5 Skilled trades | 4% | 4% |
| | 6 Caring, leisure and other services | * | * |
| | 7 Sales and customer service | 3% | * |
| | 8 Process, plant and machine operatives | 47% | 50% |
| | 9 Elementary | 18% | 16% |
| | X1 Other/Not stated | | |

**Indicates that the QHNS data is missing or fall under the limit discretion/uncertainty*

As demonstrated in the above table, there were some shifts in the occupational structure, but none of them were of any significance.

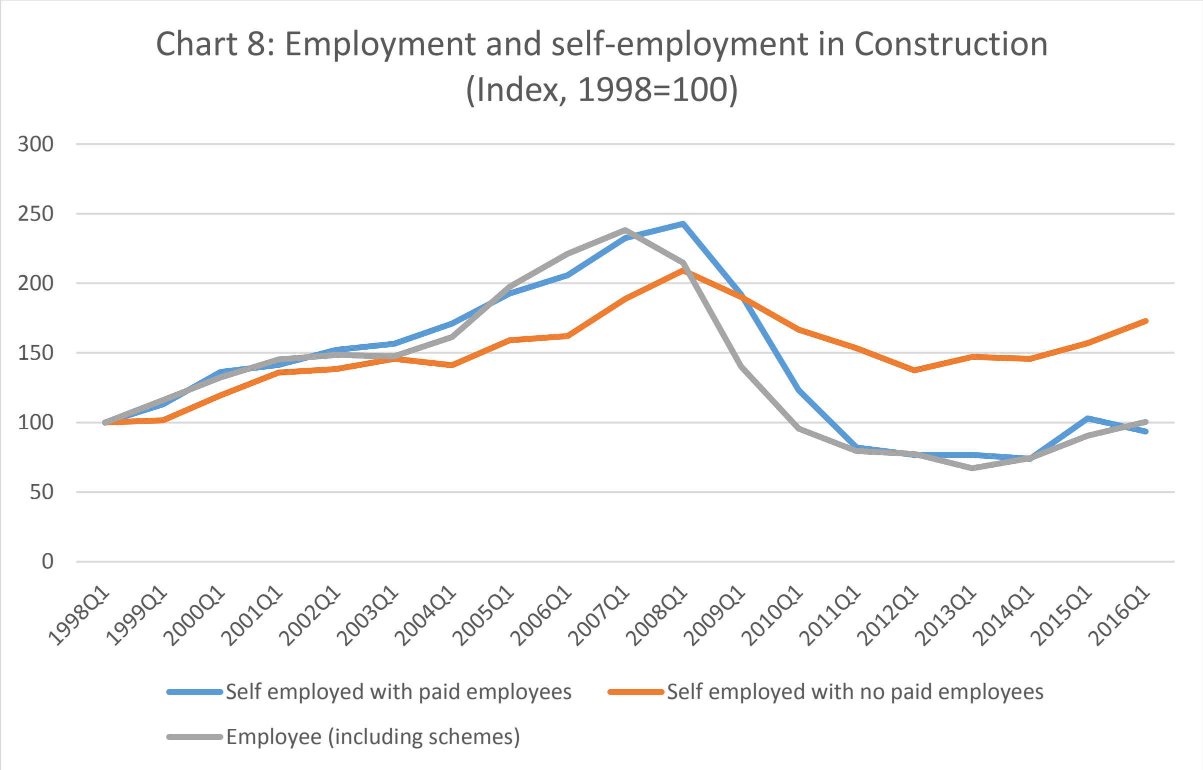
This sector is highly masculinized as 83 percent of those working in the transportation and storage are males. There were no major changes in the gender structure since 1998, when males accounted for 81 percent of workers in this sector. The share of non-Irish workers was relatively stable since 2007 and remained between 11 and 13 percent. It then fell from 12 per cent to 9 percent between 2014 and 2015 and then rose to 14 percent in 2016. This sharp rise in the last year may suggest some change which needs to be further investigated.

Sectors with a combination of high solo self-employment and temporary work

The only sector which has a combination of high solo self-employment and temporary work is construction. As the temporary work category only applies to employees, these two dimensions of precarious are usually mutually exclusive, i.e. a person will not be counted as a temporary worker if he/she is self-employed. In that sense, construction is a sector with a high proportion of precarious work, considering that more than a quarter of workers are self-employed with no paid employees, while 11 percent of the direct employment is temporary.

Construction suffered the most dramatic fall in employment after the economic downturn. It was also the sector which grew significantly during the Celtic Tiger. In 1998 there were 118.1 thousand people working in the industry and by 2004 this number had grown to 188.3 thousand. Employment reached its peak in 2008 when 270.4 thousand people were working in construction. After the crash the employment fell to 182.3 in 2009 and continued to decline over the next few years. At the lowest point in 2013 there were only 96.3 thousand people working in this sector. Employment in construction has been slowly recovering, however, and by the first quarter of 2016 it grew to 131.3 thousand.

Overall 46.6 thousand construction workers are self-employed, which accounts for 35 percent of the total construction workforce. Solo self-employment is very high in this sector, as 72 percent of them do not employ any paid employees. It is important to emphasise that the proportion of solo self-employment rose dramatically after the crash: prior to 2009 this proportion was never higher than 59 percent. The following graph illustrates that growth in relation to self-employment with paid employees and the growth of direct employment:




This graph clearly shows that immediately after the crisis solo self-employment fell at a much slower rate than the other two categories. Now the solo self-employment is growing at a similar rate to the 'employees' category. The increase in solo self-employment can be explained by the growth in bogus self-employment and a situation in which workers are pushed by larger contractors to become self-employed in order to save the cost. In reality, the worker works for one company only and should be hired as a direct employee, however they are not given that option.

This sector also has temporary work higher than national average. This is probably linked to the temporary character of construction; however it is also related to the recession. Temporary employees accounted for 9.3 percent of construction employment in 1998; this number then fell to 5.2 percent by 2007. It then rose gradually until 2012 when it reached a level of 13.4 percent. The proportion of temporary in this sector fell subsequently and was at the level of 11.6 percent in the first quarter of 2016.

The detailed industrial group breakdown for construction is as follows:

| **Construction** | |
|---|---|
| Construction of buildings (41) | 33,544 |
| Building completion and finishing (433) | 17,473 |
| Electrical installation (4321) | 12,161 |
| Plumbing, heat and air-conditioning installation (4322) | 9,006 |
| Civil engineering (42) | 6,658 |
| Other specialised construction activities n.e.c. (4399) | 4,662 |
| Other construction installation (4329) | 2,271 |
| Demolition and site preparation (431) | 1,596 |

As illustrated by the above table, construction of buildings was the largest industrial group in this sector at the time of 2011 Census. This figure, however, needs to be updated as the number of workers in this sector has grown significantly since then. Nevertheless there is evidence of the growth of precarious work in the construction of buildings. As we found during the Working Conditions Project, trade workers are pushed to be self-employed while general operatives tend to work on temporary basis and/or through employment agencies.

The occupational breakdown for this sector is as follows:

| **Construction (F)** | **2007Q1** | **2016Q1** |
|---|---|---|
| 1 Managers, directors and senior officials | 3% | 7% |
| 2 Professional | 1% | 3% |
| 3 Associate professional and technical | 2% | 4% |
| 4 Administrative and secreterial | 3% | 4% |
| 5 Skilled trades | 62% | 55% |
| 6 Caring, leisure and other services | | |
| 7 Sales and customer service | 1% | |
| 8 Process, plant and machine operatives | 10% | 13% |
| 9 Elementary | 18% | 9% |
| X1 Other/Not stated | 0% | 0% |

Unlike in the other sectors, there were some important changes in the occupational structure after the industry crashed. First of all, there is an increase in the proportion of workers at the top of the scale, with the first three grades rising from 6 percent to 14 percent. This shift can be linked to the other significant reduction of the proportion of workers in the middle (skilled trades) and at the bottom of the scale (elementary occupations), a result of massive lay-offs amongst these two categories after the crash.

This sector is highly masculinized as 94 percent of the construction workers are male. There has been a slight increase in the proportion of female workers in this sector as the share of women rose from 3 percent in 1998 to 6 in 2016. Construction was also attracting many migrant workers during the boom. In the first quarter of 2007, 17 percent of construction workers were non-Irish, which was higher than the national average. This proportion fell after the downturn and by 2012 migrants constituted 10 percent of the workers in construction. This figure has been rising gradually since then and in the first quarter of 2016, 16 percent of construction workers were non-Irish. The majority (67 percent) of them come from EU15 to EU28 states.

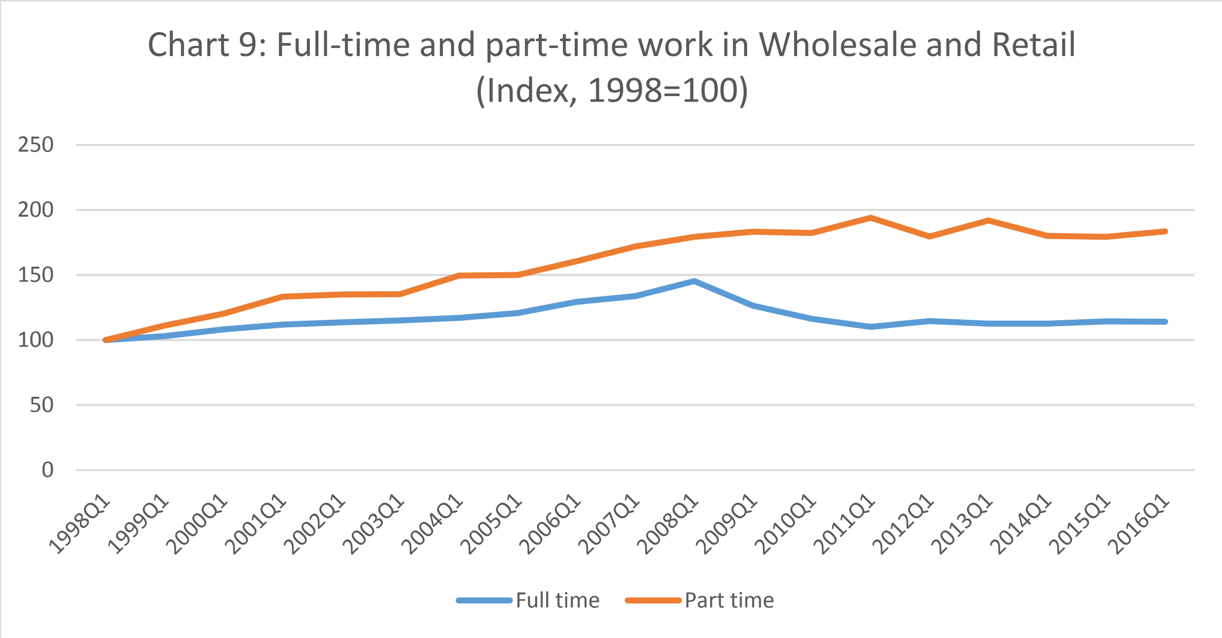
Sectors with a combination of high part-time work and temporary employment

There are three sectors which can be characterised by high levels of part-time work and short-term employment. These are: wholesale and retail, accommodation and food services and administration and support. The three sectors also constitute a significant part of the Irish labour market, as nearly a quarter of the workforce is employed in them.

*Wholesale and Retail*

There are currently 272.5 thousand people employed in the wholesale and retail sector. Employment in this sector grew gradually since 1998 when there were 208.1 thousand employees in wholesale and retail. It reached its peak in 2008 with 319.6 thousand employees, and then fell to the lowest point of 268.2 thousand in 2014.

33.3 percent of the wholesale and retail workers are employed on a part-time basis. This proportion has been rising gradually since 1998, when the share of part-time employment was at the level of 24.1 percent. There was no real decline of part-time jobs in the boom as they constituted 29 percent of all employment in this sector. The highest level was reached in 2011, when the share of part-time work reached the level of 35.9 percent. The following graph illustrates the trends in growth of part- and full-time employment in this sector:




The share of temporary wor k in this sector is also slightly higher than the national average at nearly 8 percent in the first quarter of 2016. Interestingly, this share was higher during the boom and fell after the crash. It fluctuated between 1998 and 2015 and was usually around 9-10 percent, with the exception of 2011 when the temporary work was at the level of 11.29 percent.

Detailed industrial groups in this sector are as follows:

| **Wholesale and Retail** | |
|---|---|
| Retail sale in non-specialised stores with food, beverages or tobacco predominating (4711) | 62,344 |
| Retail trade (474,4753, 4773 to 4791) | 31,038 |
| Wholesale trade (461,462,465,466,4671,4672,4674 to 4690) | 28,481 |
| Wholesale of food, beverages and tobacco (463) | 24,971 |
| Retail sale of clothing in specialised stores (4771) | 21,108 |
| Wholesale of household goods (464) | 10,511 |
| Retail sale of food, beverages and tobacco in specialised stores (472) | 9,634 |
| Retail sale of cultural and recreation goods in specialised stores (476) | 8,047 |
| Retail sale of hardware, paints and glass (4752) | 7,590 |
| Retail sale of automotive fuel in specialised stores (473) | 6,409 |
| Retail sale of information and communication equipment in specialised stores (474) | 5,869 |
| Wholesale of wood, construction materials and sanitary equipment (4673) | 4,851 |
| Retail sale of furniture and Lighting (4759) | 4,339 |
| Retail sale of footwear and leather goods in specialised stores (4772) | 2,962 |
| Retail sale of electrical household appliances in specialised stores (4754) | 2,378 |
| Retail sale of textiles in specialised stores (4751) | 758 |

Those working in food stores, convenience shops and supermarkets constitute the largest group in this sector. Jobs in this category are likely to be a subject of fexibilisation of employment relationship and an increase in zero-hour or if-and-when contracts. This is probably often the case in non-unionised supermarkets as well as smaller, franchised convenience stores. Temporary contracts may be linked to seasonal fluctuations and the nature of the industry; however this will require further investigation.

The occupational breakdown for this sector is as follows:

| **Wholesale and retail trade; repair of motor vehicles and motorcycles (G)** | **2007Q1** | **2016Q1** |
|---|---|---|
| - ,All occupational groups | 100% | 100% |
| 1 Managers, directors and senior officials | 14% | 15% |
| 2 Professional | 2% | 3% |
| 3 Associate professional and technical | 8% | 10% |
| 4 Administrative and secreterial | 7% | 8% |
| 5 Skilled trades | 10% | 8% |
| 6 Caring, leisure and other services | | |
| 7 Sales and customer service | 44% | 44% |
| 8 Process, plant and machine operatives | 5% | 5% |
| 9 Elementary | 8% | 7% |
| X1 Other/Not stated | | |

There were no major changes in the occupational structure in this sector. The biggest occupational group is sales and customer service, which remains at 44 percent.

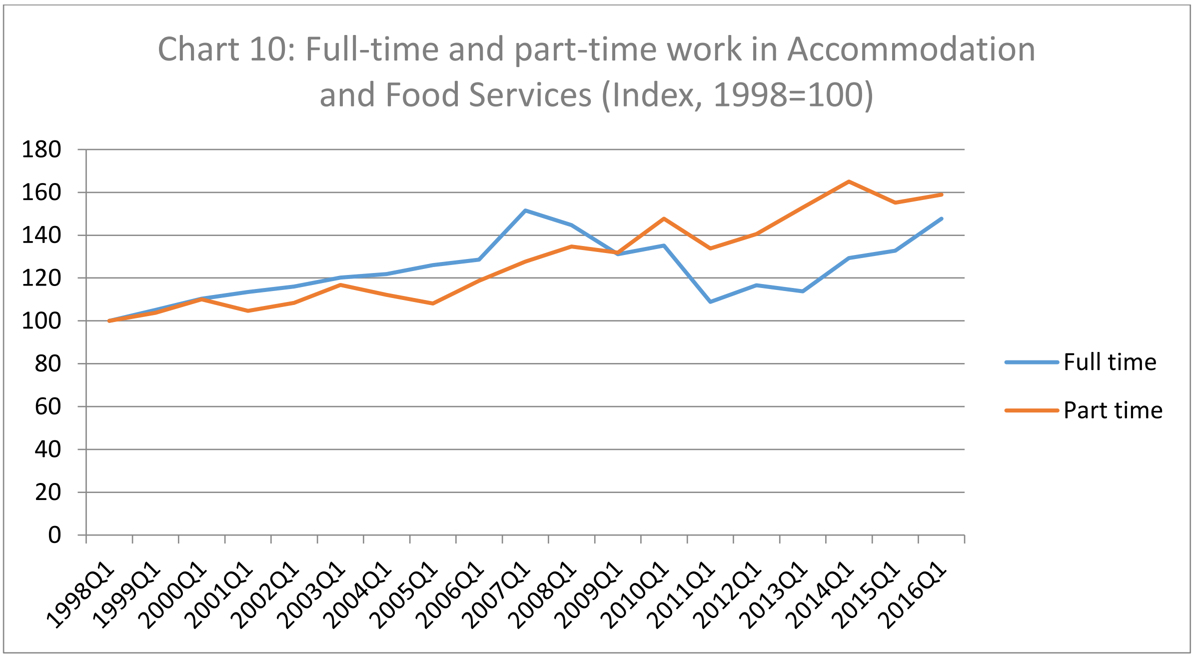
This sector is almost equal in terms of gender as there are 52 percent males and 48 percent females currently working in  wholesale and retail. This share has not changed dramatically for the last two decades: in 1998, 55 percent were males and 45 were females. In 2008, when employment in this sector was at the highest point, females constituted 51 percent of the workforce. The proportion of migrants working in this sector is higher than the national average and currently stands at 16 percent. The highest share of non-nationals was at its peak in 2008, when migrants constituted 19 percent of the wholesale and retail workforce.

*Accommodation and Food Services*

Accommodation and Food Services has the second highest proportion of part-time work amongst all the sectors; it also has a relatively high level of temporary work.  . The number of people employed in this sector grew throughout the boom, fell after the downturn and is now growing again. In 1998 there were 93.7 thousand people employed in accommodation and food; by 2007 this number rose to 133.8 thousand. After the crash it reached its lowest point in 2011 when there were 110.7 people employed in the first quarter. The growth has been steady since the recovery and employment in this sector is currently at its highest level of 142.4.

Part-time work has been a feature of this sector for quite a long time. In 1998 36.9 percent of employment in the accommodation and food sector were on part-time basis It stayed at the level of around 35 percent during the boom (with the lowest 33 percent in 2008) but the share has increased after the crash.  In the first quarter of 2013 part-time work accounted for 44.0 percent of all employment in the accommodation and food sector. It has fell since and in the first quarter of 2016 part-time work was at 38.62 percent. The following graph illustrates the growth of part- and full-time work in this sector:

Full-time and part-time work in the accommodation and food services sector (Index, 1998=100)



Detailed industrial groups breakdown for this sector is as follows:

| | |
|---|---|
| **Accommodation and Food** | |
| Hotels and similar accommodation (551) | 35,660 |
| Restaurants and mobile food service activities (5610) | 34,978 |
| Bars (5630) | 21,460 |
| Event catering and other food service activities (562) | 9,888 |
| Short-stay accommodation (552,553) | 1,563 |

As illustrated by the above table, this sector is dominated by those working in hotels and restaurants. These workers are also often a subject of if-and-when or zero hours contracts as the demand for their work depends on how busy the business is.

The occupational breakdown for this sector is as follows:

| | 2007Q1 | 2016Q1 |
|---|---|---|
| **Accommodation and food service activities (I)** | | |
| 1 Managers, directors and senior officials | 15% | 15% |
| 2 Professional | 0% | 0% |
| 3 Associate professional and technical | 2% | 3% |
| 4 Administrative and secretarial | 4% | 4% |
| 5 Skilled trades | 18% | 22% |
| 6 Caring, leisure and other services | 3% | 4% |
| 7 Sales and customer service | 3% | 3% |
| 8 Process, plant and machine operatives | 0% | 0% |
| 9 Elementary | 54% | 46% |
| X1 Other/Not stated | 0% | 0% |

As illustrated by the above table, there were two shifts in the occupational structure that occurred after the downturn: the decrease at the elementary level and an increase among skilled trades. Given the strong evidence of lack of sufficient training opportunities in this sector, the explanation for this increase is unclear and will require further investigation.

This sector is also characterised by a higher than average share of temporary work. This can be related to the seasonal character of the industry, especially in the areas which rely on tourism. In the first quarter of 2016, 11.17 people were employed temporary in this sector (compare to the 7 percent national average). Interestingly, the share of temporary work has been gradually falling over the last two decades (with an exception of a slight growth after the crash). In 1998 18.4 percent of accommodation and food employees had temporary contracts; this number fell to 12.9 percent in 2007. It then rose moderately to reach its peak of 16.8 percent in 2012. It then, however, fell and is now at a lower level than during the boom. This can be partially explained by the changing nature of employment relationship in this sector, which is gearing towards the zero-hours and if-and-when contracts. As we found in the Working Conditions Project, employers do not need to offer temporary contracts, they simply do not guarantee any hours. If there is no demand for work, employees do not get shifts and may remain employed on very low hours.

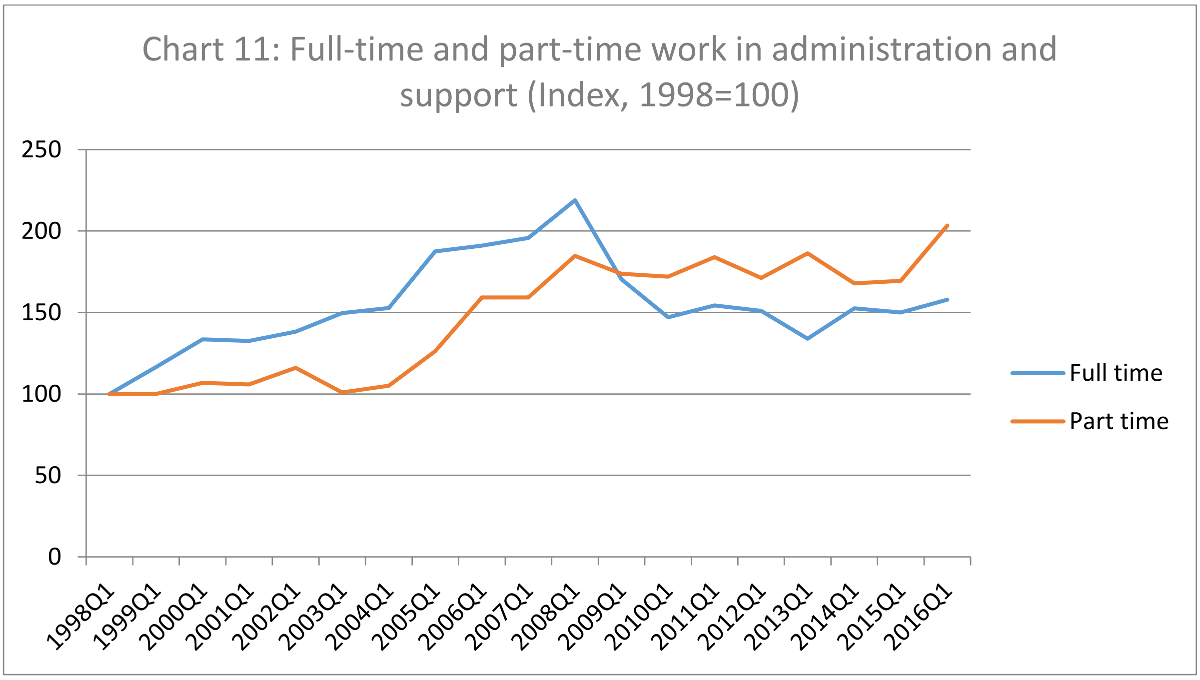
Accommodation and food services sector is relatively equal in terms of gender, as 47 percent of employed were males and 53 percent were female. The proportion of males working in this sector has increased over the years (and since the crash): in 1998 42 percent of those working in accommodation and food services were male; this remained unchanged in 2007. In terms of nationalities, this sector has a very high proportion of non-Irish workers. In 2016 38 percent working in the sector were non-Irish, and the proportion was the same in 2007. The share of migrant work fell during the crisis and was at the lowest point of 31 percent in 2011, when overall employment in this sector was also at the lowest level. 18 percent of workers in the accommodation and food come from New Member States, however the number of non-EU nationals is also relatively high: they accounted for 15 percent of all working in this sector by the first quarter of 2016. It is also important to emphasise that while the share of EU migrants remains relatively stable (between 20-25 percent when EU15 are included), the proportion of non-EU nationals has varied over the last 10 years. It fell from 11 percent in 2007 to 7 percent in 2011-2012 but is on the increase since then. This trend may suggest heavier reliance on vulnerable workers, however this will require further exploration.

*Administration and Support*

Administration and Support has one of the highest proportions of part-time work and a higher than the national average share of temporary work. There are currently 68.2 thousand people working in this sector. Employment in administration and support grew during the boom, but was significantly affected by the recession. In 1998 it employed 39.8 thousand people; this numbers more than doubled by 2008 when there was 83.1 thousand working in this sector. It decreased to 68.2 thousand in 2009 and then fluctuated to reach the lowest level of 59.5

thousand in 2013. The employment has recovered since, with the biggest growth between the first quarters of 2015 and 2016.

The share of part-time work in administration and support fell from 29.6 percent in 1998 to 22.1 percent in 2005. After that it grew gradually and reached a level of 37.0 percent in the first quarter of 2013. It then fell to 31.7 percent in 2014 and increased again to 35.2 percent in the first quarter of 2016. The growth of full-time and part-time work can be illustrated by the following graph:




Administration and support also has temporary work at a level which is higher than the national average. The share of temporary work fluctuated over the years and did not really decrease during the boom. In 1998 9.2 percent in this sector were employed on temporary basis; this share fell to 7.3 percent in 2002 but increased to nearly 10 percent in 2005. The highest level of temporary work in this sector was 11.6 percent in 2012. This number fell to 8.3 in 2015 and grew again to 9.2 percent in 2016. Such fluctuations may suggest that temporary work in this sector is not directly related to the overall economic boom-bust-recovery cycle and that there are different explanation for its increases and decreases. This will need to be explored further.

The detailed industrial group breakdown is as follows:

| **Administration and Support** | |
|---|---|
| Services to buildings and landscape activities (81) | 22,931 |
| Security and investigation activities (80) | 10,433 |
| Renting and leasing activities (77) | 9,327 |
| Office administrative, office support and other business support activities (82) | 6,410 |
| Employment activities (78) | 5,891 |
| Travel agency, tour operator and other reservation service and related activities (79) | 5,724 |

The name of the sector suggests the dominance of white-collar work, however this table illustrates that this is not the case. The largest group within this sector is 'services to buildings and landscape activities', which actually includes mainly unskilled work such as cleaning or ground maintenance. One of the biggest precarious groups, probably operating on variable hours, might be contract cleaning. This needs to be explored further.

The occupational breakdown for this sector is as follows:

| | **2007Q1** | **2016Q1** |
|---|---|---|
| **Administrative and support service activities (N)** | | |
| 1 Managers, directors and senior officials | 5% | 6% |
| 2 Professional | 3% | 0% |
| 3 Associate professional and technical | 8% | 8% |
| 4 Administrative and secretarial | 21% | 14% |
| 5 Skilled trades | 10% | 12% |
| 6 Caring, leisure and other services | 8% | 5% |
| 7 Sales and customer service | 9% | 10% |
| 8 Process, plant and machine operatives | 2% | 0% |
| 9 Elementary | 34% | 37% |
| X1 Other/Not stated | | |

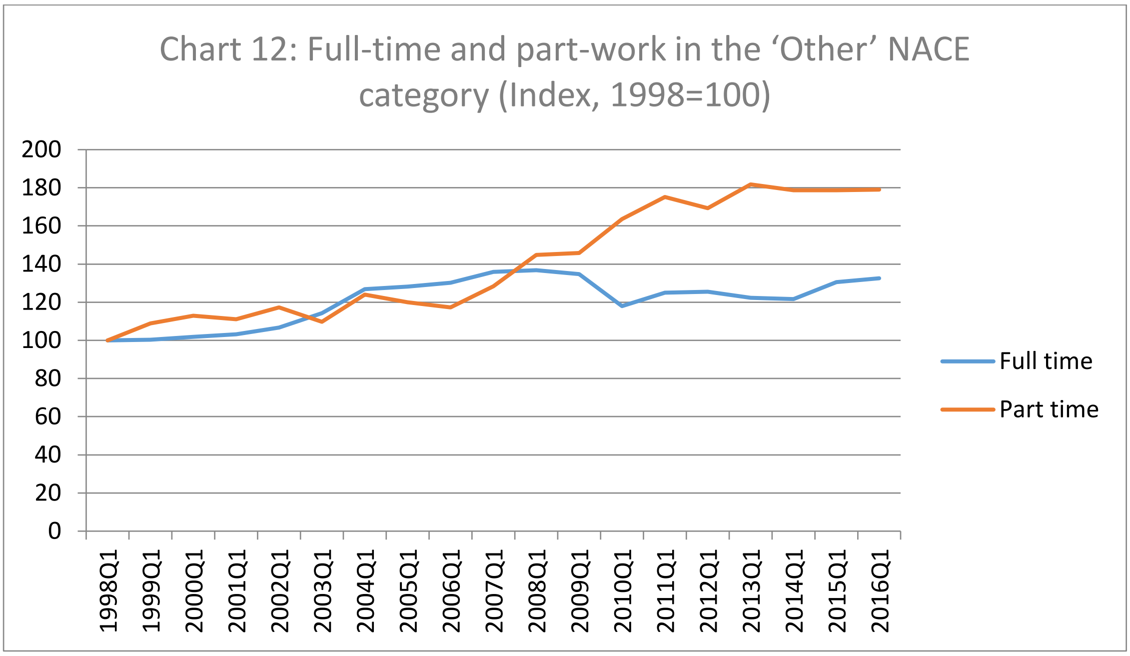
The largest decrease occurred in the administrative and secretarial grade. There was also a slight increase in elementary grade and in skilled trades. As this sector includes agency employment this increase may suggest a rise of agency work for unskilled and skilled workers who would otherwise be classified as working in a different sector. This issue, however, would require more investigation.

This sector is also relatively equal in terms of gender as males constitute 52 percent of the total workforce in the administration and support. The proportion of males in this sector grew significantly over the last two decades: in 1998 only 43 were male. The share of male workers increased to 49 percent in 2007 which suggests a longer term shift in the sector, not necessarily linked to the recession. The proportion of migrants in administration and support is higher than the national average as currently non-Irish nationals account for 26 percent of this sector's workforce. Since the recession this proportion has fluctuated. In 2007, 20 percent of people employed in this sector were non-Irish; this percentage increased to 27 in 2008. It then oscillated between 22 and 27 percent, however it has been growing over the last three years.

<u>Sectors with high levels of all types of precarious work</u>

There is one sector of the Irish labour market which has all three types of atypical work at levels higher than the national average. It is classified as the 'Other NACE activities (R to U)' and includes different types of activities, ranging from personal services, art, to domestic paid workers. The 'R' category represents those working in arts, entertainment and recreation; 'S' is assigned to 'other service activities', T' is defined as 'activities of households as employers;; undifferentiated goods and services of households for own use'; and 'U' includes 'activities of extra territorial organisations and bodies'. There were 104.1 thousand people working in this sector in the first quarter of 2016. This number grew gradually throughout the boom, the recession and the recovery, with some minor decreases after the crash. In 1998 there were 70.6 thousand workers classified in the 'Other' sector; by 2008 this number increased to 98.4 thousands and it is currently at the highest level.

The share of part-time work in this sector is the highest amongst all the sectors of the Irish economy. It has always been relatively high, with 31.9 percent in 1998, dropping to 29.7 percent in 2006. Part-time work in the other sector reached its peak in 2013 when nearly 41 percent of all working in this sector were employed on a part-time basis. This share declined since and is currently at a level of 38.7 percent. The following graph illustrates the growth of full- and part-time work in this sector:




Self-employment, and most notably solo self-employment is also high in this sector. 26 percent of those who were working in this sector in the first quarter of 2016 were classified as self-employed; 76 percent of them did not employ any paid employees. There has not been any major changes in these shares. Total self-employment since 1998 has always been oscillating between 20 and 25 percent, with the exception of 2006 when it dropped to 19 percent. The current rate of 26 percent is the highest since then. Solo self-employment remained slightly above or slightly below 70 percent throughout that time. It reached the highest level in 2015 when 77 percent of self-employed in the 'other' category did not have any paid employees.

Temporary work in this sector is also above the national average. It decreased from 13.3 percent in 1998 to 10.9 percent in 2005. It was gradually increasing between 2006 and 2012 when it reached the highest level of 19.9 percent. The share of temporary work in the 'other' category has been decreasing since then and is now at the level of 11.3 percent.

Detailed breakdown for the industrial groups in the ‘other’ category is as follows:

| **Other NACE activities (R to U)** | | |
|---|---|---|
| | Hairdressing and other beauty treatment (9602) | 19,757 |
| | Sports activities and amusement and recreation activities (93) | 13,553 |
| | Activities of membership organisations (94) | 11,189 |
| | Creative, arts and entertainment activities (900) | 6,324 |
| | Gambling and betting activities (920) | 5,912 |
| | Libraries, archives, museums and other cultural activities (910) | 4,874 |
| | Washing and (dry-) cleaning of textile and fur products (9601) | 3,041 |
| | Repair of computers and personal and household goods (95) | 2,530 |
| | Activities of households as employers of domestic personnel (970) | 1,969 |
| | Other personal service activities n.e.c. (9609) | 1,007 |
| | Funeral and related activities (9603) | 827 |
| | Activities of physical well-being institutes (9604) | 789 |

The largest numbers of people classified as ‘other’ category are in the hairdressing and beauty, followed by those working in sports activities, and amusement and recreation activities. It is unclear at this stage of the project if precarious work occurs in the first group and if so, what type of precarity is involved. The second largest group includes those employed in leisure centres, fitness clubs and bookmakers. These sub-categories can potentially be a subject of variable part-time work or temporary contracts linked to the seasonal demand for some of the work.

The occupational structure of the sector is illustrated by the following table:

| | | **2007Q1** | **2016Q1** |
|---|---|---|---|
| **Other NACE activities (R to U)** | | | |
| | 1 Managers, directors and senior officials | 5% | 8% |
| | 2 Professional | 10% | 9% |
| | 3 Associate professional and technical | 15% | 21% |
| | 4 Administrative and secretarial | 12% | 12% |
| | 5 Skilled trades | 8% | 6% |
| | 6 Caring, leisure and other services | 34% | 33% |
| | 7 Sales and customer service | 2% | * |
| | 8 Process, plant and machine operatives | 2% | * |
| | 9 Elementary | 11% | 7% |
| | X1 Other/Not stated | | |

Since the recession there has been a decrease in the share of the elementary grade and an increase in the associate professional and technical grade. One possible explanation for this trend could be that the some professionals are moving to this sector after being laid off from their regular jobs; however this needs to be explored further.

This sector is highly feminized as 61 percent of the workforce are female. There has been a decrease in the share of males in the 'other' category; however this decrease occurred before the recession: in 1998 females accounted for the 56 percent of all employed in this sector; this number grew to 61 percent in 2007. The share of migrants in the 'other' category is only slightly higher than the national average and currently 18 percent of those working in this sector are non-Irish nationals. In 2007 the share of migrant workers in the 'other' category was at the level of 16 percent. The lowest level was in 2011 when the share of non-Irish nationals fell to 14 percent, and the highest level of 20 percent was recorded in 2015.

**Concluding remarks**

The financial crisis had a strong impact on employment in Ireland. Between the highest point in 2007 and the lowest in 2012 almost 300 thousand (or 14 percent) of jobs were lost. What needs to be emphasised, however, is that not all sectors were equally affected and the only dramatic fall in employment occurred in construction where nearly 170 thousand jobs were made redundant. In all other sectors the losses were not that severe. Since the economic downturn, however, there has been some growth in the number of atypical contracts, especially in part-time work, but also in temporary employment and solo self-employment. Not all of the sectors were affected equally and some parts of the labour market did not experience this growth in an equal way, nevertheless the atypical employment increased dramatically in some sectors. This may suggest ongoing flexibilisation of some employment, particularly in such sectors as construction, wholesale and retail, hospitality, transportation and storage, human health, education and the broad category of 'other'.

What needs to be emphasised, however, is that the growth of contractually precarious work is first of all not a completely new phenomenon, and secondly that it is not 'irreversible'. All three types of atypical employment predate the recession and in some cases (for example temporary work) the percentages are not much higher than during the boom. What could be the case, however, is that the nature of such contracts has been changing. For example, as previously mentioned, not all part-time work is precarious. However, further investigation is required in order to establish to what extent the irregular part-time work has been on the rise since the recession. Temporary work, on the other hand, has not grown rapidly, yet the available data does not provide any evidence of its 'long-term' character. In other words, what needs to be established is whether or not temporary jobs are just a 'stepping stone' for the new entrants, or whether individuals remain employed on temporary contracts for prolonged periods of time. Solo self-employment, which grew dramatically in construction, needs to be examined in relation to bogus self-employment and the actual potential for growth (e.g. future possibilities of employing other people). Finally, it is clear from the statistical data that the number of atypical contracts has recently fallen, which can be linked to the economic recovery. The numbers of precarious workers, however, are still high in some sectors which raises questions of 'reversibility' of such trends. This issue needs to be monitored through the macro data and further investigated in the qualitative part of this study.