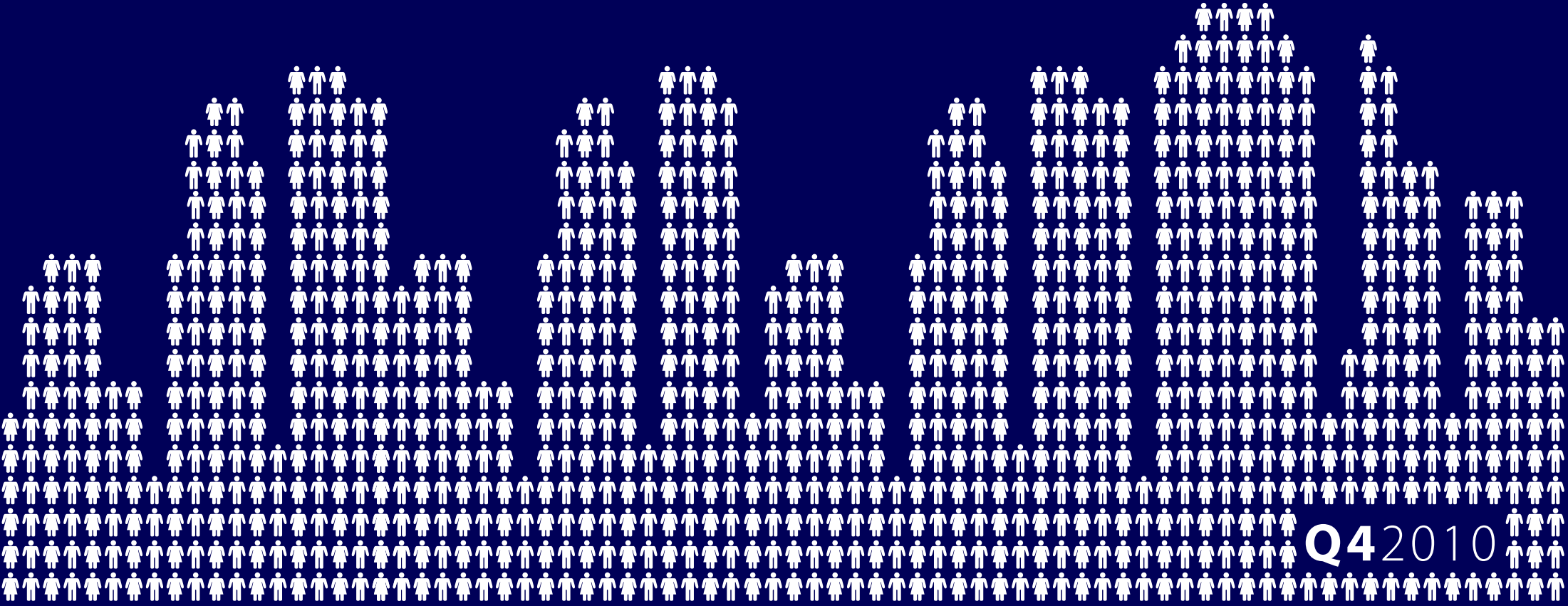




Group

# IRELAND WORKFORCE MARKET SENTIMENT SURVEY

Respondents: 2,706 | Release Date: February 2011



Q4 2010

**“ OPTIMISM  
REIGNS IN  
IRELAND ”**

Berkley Recruitment Group is an international search firm with offices in Dublin, Cork and Singapore has just completed its latest Q4 Market Sentiment Survey. From a response of nearly 3,000 professionals within the Pharmaceutical & Life Sciences, Information Technology, and Commercial Executives sectors, the survey reveals insights into the mood of Irish based professionals.

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# Q4 2010

The timing of this report update

# 7 YEARS

The length of time that Berkley has been tracking company and jobseeker sentiment

# TWO WEEKS

The time over which data was gathered for this report

# IRELAND

The focus of this study

# 2,706

The number of respondents to this study

# 65%



The proportion of respondents who were men


# 35%

The proportion of respondents who were women

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# KEY FINDINGS


 Arrow denotes change from historical data  
 New question with no trend data available


 **34%** Employment Outlook  
34% believe that there will be increased opportunities for high skilled roles in the next 6 months, an increase from 23% in Q1.

 **37%** Job Market Optimism  
37% of respondents are optimistic about the job market in Ireland, a strong increase from 22% in Q3.

 **36%** Job Market Opportunities  
36% of Irish respondents feel that the job market is weak and does not present enough opportunities for them, much higher than the 20% that felt this way in Q1.

 **63%** Company Hiring  
Nearly two-thirds believe that jobs have been cut in 2010, a slight increase from 61% last quarter.

 **71%** Company Prospects  
71% of respondents believe that business is the same or better than 12 months ago, slight increase from 70% in Q3.

 **20%** Job Move Motivation  
Job security is an increasing factor in job move motivation, 20% of respondents stating this is their primary motivation, an increase from 17% in Q1.

 **56%**

**Job Move Timing**  
The number of respondents looking to move jobs in the next 6 months has risen by 9% to 56%.

 **29%**

**Headhunter Approaches**  
29% did not receive an approach from a headhunter, higher than the global figure of 22%.

 **39%**

**Pay Rise Expectations**  
39% of respondents in Ireland are expecting a pay rise in 2011, an increase from 27% in Q3.

 **49%**

**Application Process Time**  
49% of applicants had a job offer within 4 weeks of their application, mirroring the global average.

 **46%**

**Job Security**  
46% of respondents are more worried about their job security than one year ago, an increase from 43% in Q3 but much lower than the 64% in Q4 2009.

 **17%**

**Promotion Prospects**  
Only 17% of Irish respondents feel that their chances of promotion have improved in the last 12 months, this compares to the 23% global average.

 **47%**

**Sick Days**  
47% did not take any sick days in 2010, this is higher than the global average of 43%.

 **13%**

**Work Standard Changes**  
13% feel that the standard of work carried out by their colleagues has reduced in the last 12 months with 42% feeling this is because colleagues are too busy.

# STATEMENT FERGAL BROSANAN, MD

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For the fourth consecutive quarter, Irish respondents to Berkley's job market sentiment report an improvement in their optimism. From a high of 80% who described the market as weak in Q1 2010, the figure now stands at 64%. Encouragingly, 37% reported they were optimistic for the year ahead, compared with just 22% feeling the same in Q3 2010.

In many areas, the Irish findings fall below global averages, however, these values are skewed by an optimistic Asian continent and looking more closely we see that sentiments in Ireland are not out of kilter with many western developed economies particularly the US and the UK. In many ways, the results display more optimism than other countries that have been subjected to severe austerity measures.

As an example, 70% of Irish respondents believed business prospects were the same or better in their company than 12 months ago, against a global mark of 76%. With some Asian countries hitting 90%+, US was 67%, UK 74%, Italy 65% and Spain 74%. Our feeling is that this steady upswing will continue, and slowly but surely confidence will continue to return to the market.

Evidence of the growth in confidence comes in relation to pay rise expectations for the coming 12 months. In our Q3 survey, only 27% of respondents expected a pay rise in 2011, with this figure increasing to 37% in Q4. Analysing the figures of those who expect pay rises, Ireland mirrors global figures, but at the top end people still value their worth, with 5% expecting a rise of 10% or more. The global figure here is 13%, again distorted by Asian countries such as China, India, Singapore, Philippines and Thailand, with figures ranging from 29% to 58% expecting bumper pay days.

Irish respondents certainly appear willing to work hard for these opportunities and nearly half of our respondents (47%) did not take any sick days in the last 12 months, compared to a global average of 42%. Irish respondents may indeed be healthier than their global peers, but more likely points to a determination to get on in their professional lives.

We see this career focus in the survey with 56% of Irish respondents stating that they would change jobs within 6 months for the right opportunity compared with 47% in Q3, bang in line with the global average of 58%. Motivations to move show a predictable shift towards job security with 20% stating this as their primary motivator, up from 16% in Q3, the highest value of any country surveyed. Career progression is still the primary motivator in Ireland at 39%, just below a global average of 43%. Jobseekers are taking their time to ponder career moves, and given the economic climate of the last 2 years, candidates are undertaking their own due diligence research on the prospective hiring company i.e. to see if they are on a sound financial footing.

Overall we conclude that the measured optimism we have reported over the last 4 quarterly surveys continues, not at a lightning pace, but the cumulative increases are bringing us back towards a 'normal' market i.e. pre Celtic Tiger. There are excellent opportunities for strong people, evidenced by Berkley's open role levels being 250% higher than at the end of 2009. However, hiring companies need to place compelling reasons to move to the most in-demand individuals.



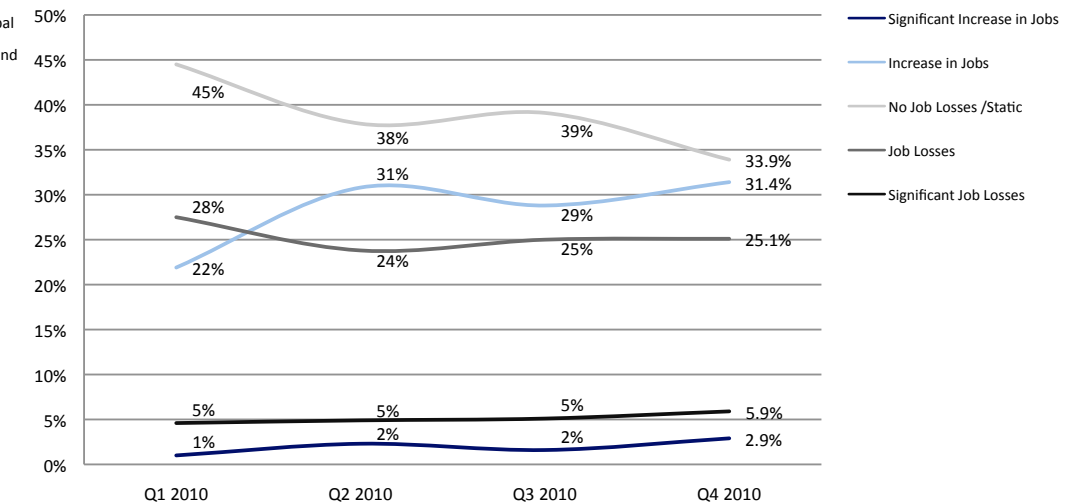
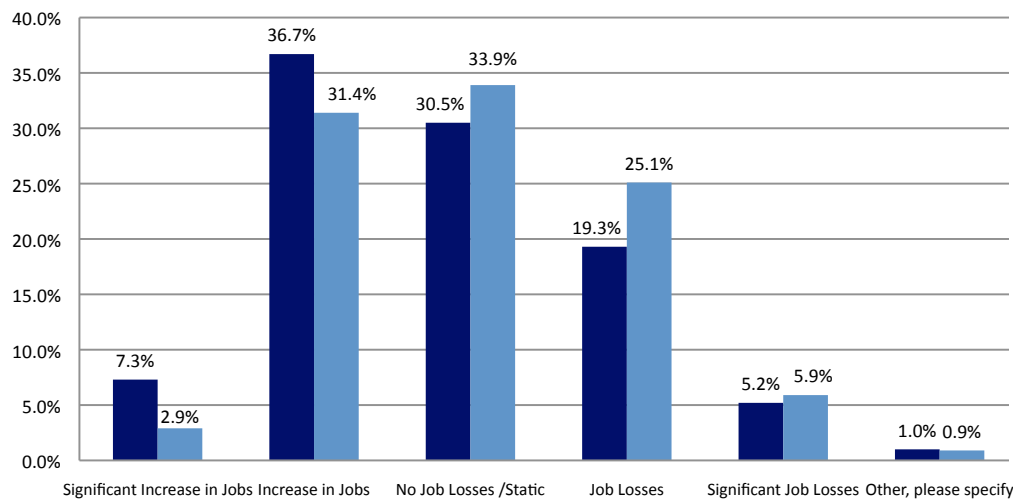
Fergal Brosnan, Managing Director

# EMPLOYMENT OUTLOOK

Given Analyst and Media comments and forecasts for job losses/job creation over the next 6 months, what is your personal view on the employment outlook for High Skilled & Associated Roles (R&D)?

34% of respondents believe that there will be jobs created in the next six months in Ireland, this is less than the 44% of global respondents that see jobs being created in the future. Sentiments on job losses in the near term are more positive in Ireland than the UK. With austerity measures in full effect, 42% of UK respondents believe that there will be job losses compared to 31% of Irish respondents. Respondents in China and India are most positive about future employment in high skilled roles with 71% and 77% of their respondents believing that opportunities will increase.

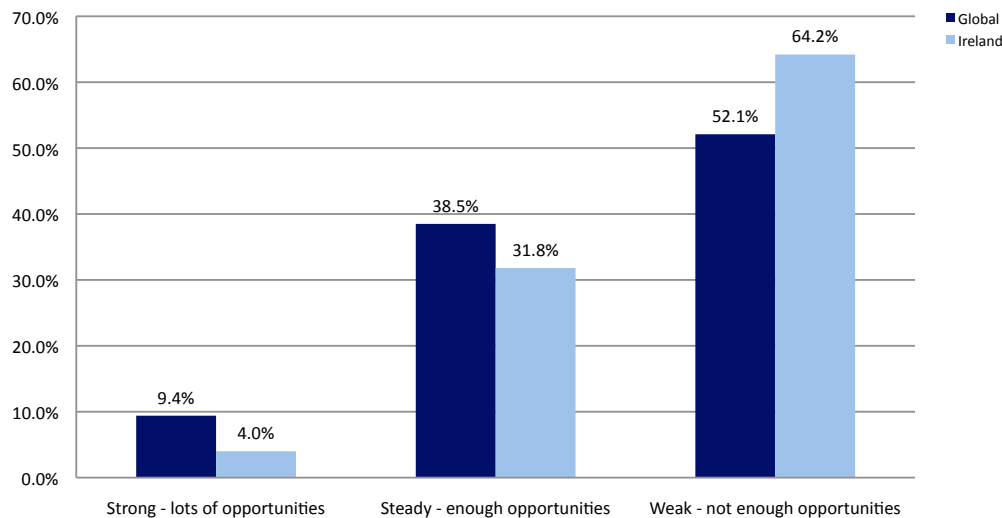
	Significant Increase in Jobs	Increase in Jobs	No Job Losses /Static	Job Losses	Significant Job Losses	Other, please specify
Global	7.3%	36.7%	30.5%	19.3%	5.2%	1.0%
Ireland	2.9%	31.4%	33.9%	25.1%	5.9%	0.9%
Australia	7.7%	46.2%	26.9%	11.5%	0.0%	7.7%
Belgium	0.0%	28.6%	50.0%	14.3%	0.0%	7.1%
China	16.7%	54.2%	25.0%	4.2%	0.0%	0.0%
Czech Republic	0.0%	62.5%	12.5%	12.5%	0.0%	12.5%
Finland	0.0%	54.5%	36.4%	9.1%	0.0%	0.0%
France	16.7%	37.5%	25.0%	16.7%	4.2%	0.0%
Germany	0.0%	53.8%	23.1%	19.2%	3.8%	0.0%
India	28.3%	48.3%	18.3%	1.7%	1.7%	1.7%
Indonesia	46.7%	33.3%	13.3%	0.0%	6.7%	0.0%
Ireland	2.9%	31.4%	33.9%	25.1%	5.9%	0.9%
Italy	0.0%	40.5%	31.0%	21.4%	7.1%	0.0%
Malaysia	17.4%	39.1%	30.4%	13.0%	0.0%	0.0%
Netherlands	3.8%	42.3%	30.8%	15.4%	7.7%	0.0%
New Zealand	0.0%	62.5%	25.0%	0.0%	12.5%	0.0%
Philippines	30.8%	49.5%	13.2%	6.6%	0.0%	0.0%
Poland	7.7%	38.5%	46.2%	7.7%	0.0%	0.0%
Saudi Arabia	42.9%	28.6%	14.3%	14.3%	0.0%	0.0%
Singapore	16.6%	55.8%	19.8%	5.5%	1.4%	0.9%
South Africa	14.3%	71.4%	0.0%	0.0%	14.3%	0.0%
Spain	5.4%	40.5%	21.6%	24.3%	8.1%	0.0%
Sweden	0.0%	69.2%	23.1%	7.7%	0.0%	0.0%
Switzerland	0.0%	16.7%	66.7%	8.3%	8.3%	0.0%
Thailand	0.0%	62.5%	25.0%	12.5%	0.0%	0.0%
United Arab Emirates	7.1%	28.6%	14.3%	28.6%	14.3%	7.1%
United Kingdom	3.8%	21.8%	30.8%	30.8%	11.3%	1.5%
United States	2.8%	31.8%	44.9%	11.2%	9.3%	0.0%



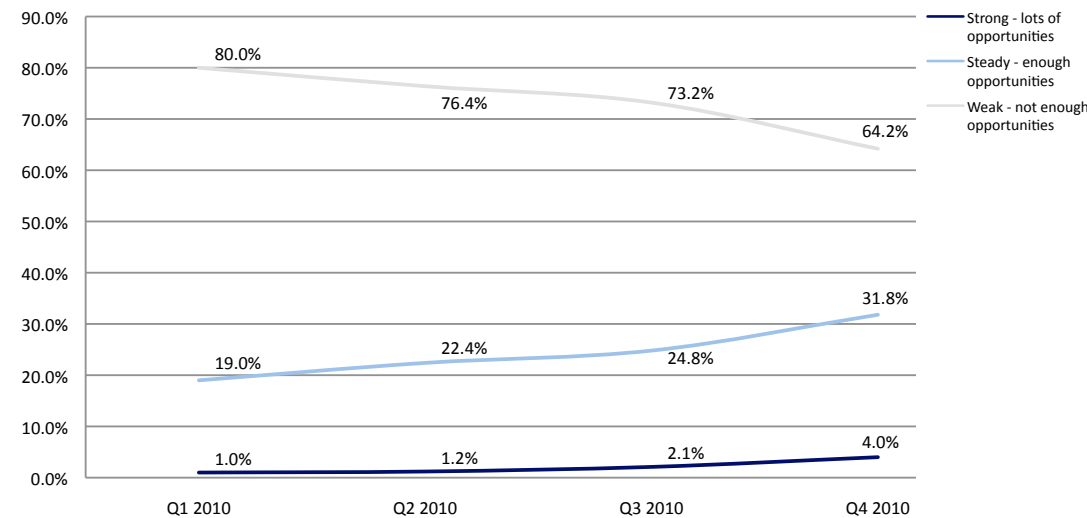
# JOB MARKET OPPORTUNITIES

## How would you describe the jobs market?

Perceptions on the strength of the job market in Ireland have improved again in Q4 and now 36% of respondents feel that there are enough opportunities for them, an increase from 20% at the start of 2010. These sentiments are comparable with those of Spain (36%) and higher than in Italy (28%), US (30%) and the UAE (21%). However, Irelands optimism on job opportunities is still dwarfed by the rest of the world and 82% of Indian and 88% Indonesian respondents believing opportunities exist in their respective markets.



	Strong - lots of opportunities	Steady - enough opportunities	Weak - not enough opportunities
Global	9.4%	38.5%	52.1%
Ireland	4.0%	31.8%	64.2%
Australia	42.3%	42.3%	15.4%
Belgium	6.7%	60.0%	33.3%
China	16.7%	58.3%	25.0%
Czech Republic	12.5%	75.0%	12.5%
Finland	18.2%	36.4%	45.5%
France	16.7%	50.0%	33.3%
Germany	17.9%	64.3%	17.9%
India	30.0%	51.7%	18.3%
Indonesia	43.8%	43.8%	12.5%
Ireland	4.0%	31.8%	64.2%
Italy	4.7%	23.3%	72.1%
Malaysia	17.4%	47.8%	34.8%
Netherlands	10.7%	35.7%	53.6%
New Zealand	25.0%	37.5%	37.5%
Philippines	28.0%	50.5%	21.5%
Poland	15.4%	46.2%	38.5%
Saudi Arabia	42.9%	14.3%	42.9%
Singapore	17.1%	62.7%	20.2%
South Africa	28.6%	42.9%	28.6%
Spain	7.7%	28.2%	64.1%
Sweden	28.6%	42.9%	28.6%
Switzerland	0.0%	50.0%	50.0%
Thailand	12.5%	37.5%	50.0%
United Arab Emirates	0.0%	21.4%	78.6%
United Kingdom	4.3%	50.0%	45.7%
United States	2.8%	27.5%	69.7%

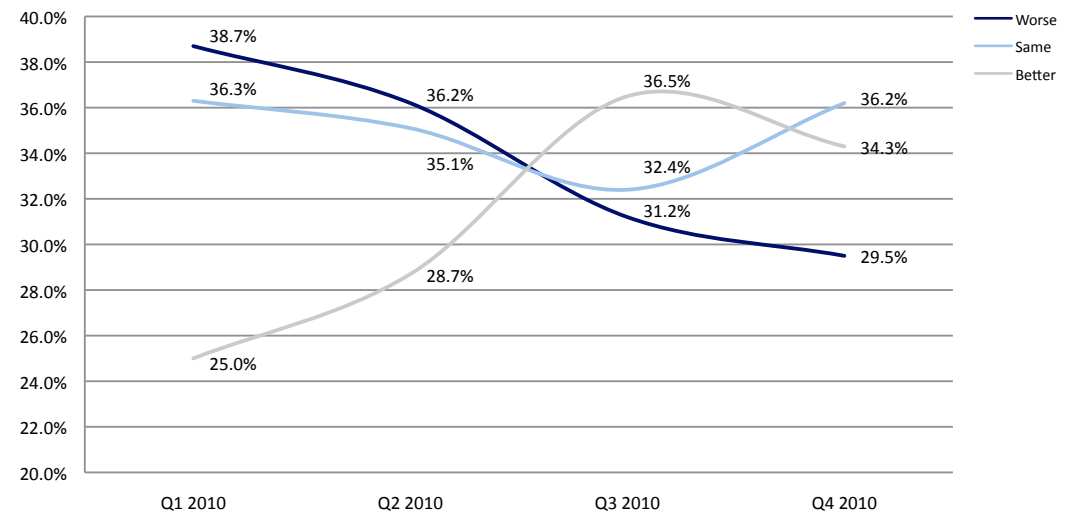
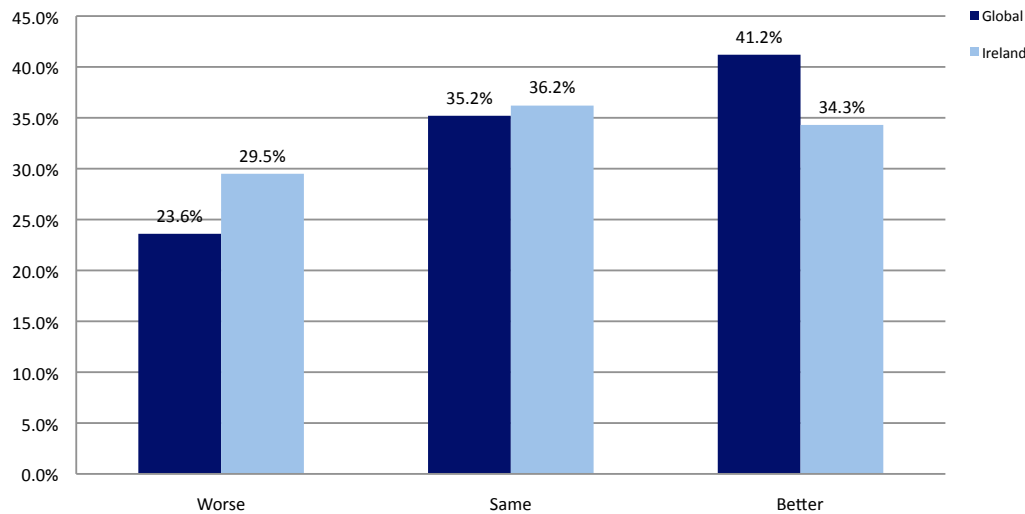


# COMPANY PROSPECTS

Never mind about economic forecasts, how do you think business is going in the company where you work compared with 12 months ago?

Irish respondents are more positive about their company prospects than last quarter with 70% thinking that business is the same or better placed than it was 12 months ago, this compares to 61% in Q1. This is comparable to European countries such as Germany and Spain on 74%. However, company prospects are viewed more strongly in China, Sweden, Thailand Malaysia and New Zealand, where 100% of respondents believe that at the very least business prospects will remain the same.

	Worse	Same	Better
Global	23.6%	35.2%	41.2%
Ireland	29.5%	36.2%	34.3%
Australia	3.8%	57.7%	38.5%
Belgium	0.0%	60.0%	40.0%
China	0.0%	30.4%	69.6%
Czech Republic	12.5%	37.5%	50.0%
Finland	9.1%	45.5%	45.5%
France	17.4%	34.8%	47.8%
Germany	25.9%	29.6%	44.4%
India	8.3%	31.7%	60.0%
Indonesia	12.5%	6.3%	81.3%
Italy	34.9%	39.5%	25.6%
Malaysia	0.0%	47.8%	52.2%
Netherlands	21.4%	25.0%	53.6%
New Zealand	0.0%	50.0%	50.0%
Philippines	9.9%	35.2%	54.9%
Poland	8.3%	50.0%	41.7%
Saudi Arabia	14.3%	28.6%	57.1%
Singapore	10.3%	30.8%	58.9%
South Africa	28.6%	28.6%	42.9%
Spain	26.3%	36.8%	36.8%
Sweden	0.0%	35.7%	64.3%
Switzerland	8.3%	50.0%	41.7%
Thailand	0.0%	75.0%	25.0%
United Arab Emirates	14.3%	42.9%	42.9%
United Kingdom	25.7%	32.4%	41.9%
United States	33.3%	29.6%	37.0%

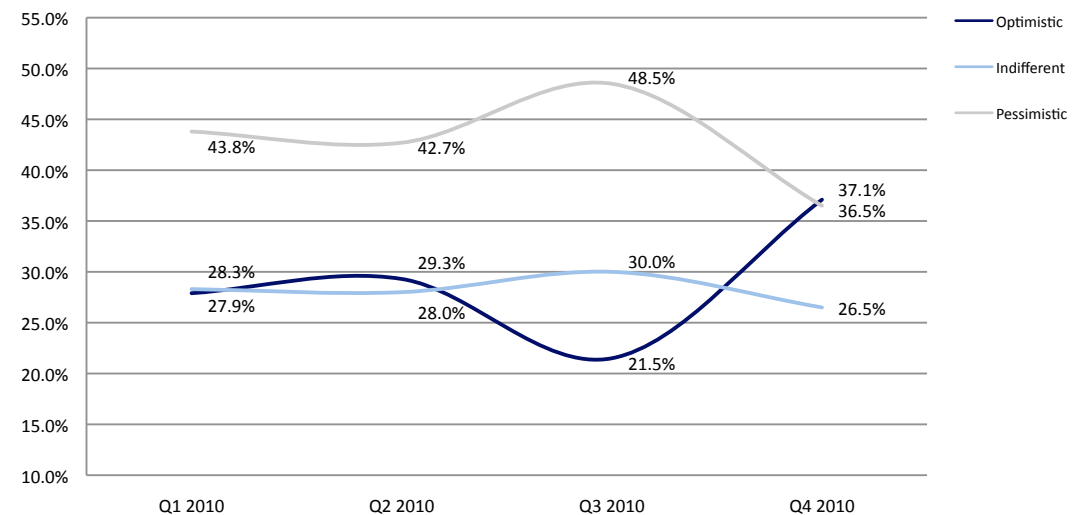
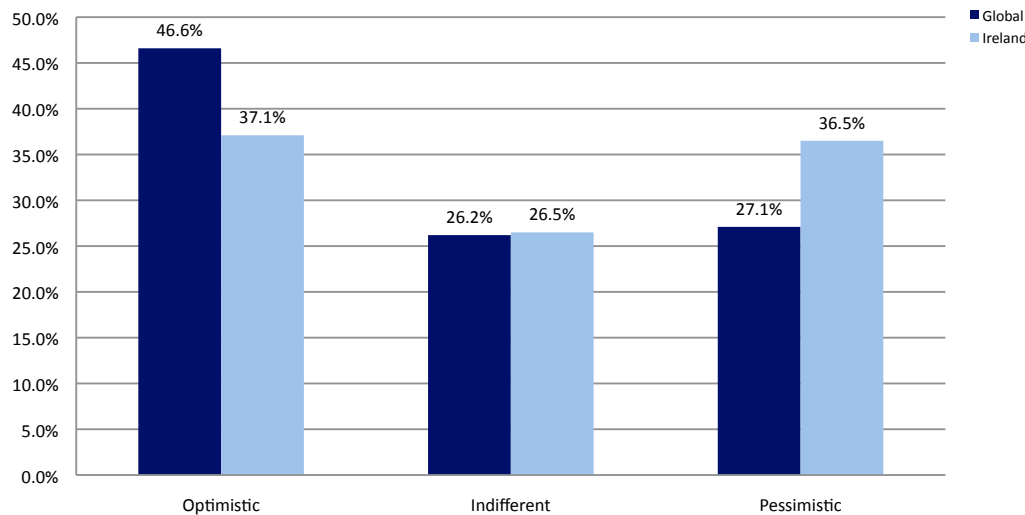


# JOB MARKET OPTIMISM

For 2011, how would best describe your mood for the Jobs Market?

As 2010 ends, Ireland is more positive about prospects for the year ahead with 37% of respondents feeling 'optimistic', this compares favourably with the 22% of respondents in Q3. Although an improvement, this figure still trails the global average of 47% and if we look across the globe, we find the only country in our survey that is less optimistic is Switzerland (25%). South East Asia is particularly optimistic – Philippines (91%), Indonesia (88%) with sentiments more measured in Europe in Spain (41%) and UK (43%).

	Optimistic	Indifferent	Pessimistic
Global	46.6%	26.2%	27.1%
Ireland	37.1%	26.5%	36.5%
Australia	65.4%	26.9%	7.7%
Belgium	46.7%	33.3%	20.0%
China	50.0%	37.5%	12.5%
Czech Republic	50.0%	37.5%	12.5%
Finland	72.7%	27.3%	0.0%
France	54.2%	29.2%	16.7%
Germany	46.4%	39.3%	14.3%
India	73.3%	23.3%	3.3%
Indonesia	87.5%	6.3%	6.3%
Italy	37.2%	25.6%	37.2%
Malaysia	56.5%	34.8%	8.7%
Netherlands	53.6%	28.6%	17.9%
New Zealand	62.5%	12.5%	25.0%
Philippines	91.2%	7.7%	1.1%
Poland	53.8%	38.5%	7.7%
Saudi Arabia	71.4%	28.6%	0.0%
Singapore	68.0%	25.3%	6.7%
South Africa	71.4%	14.3%	14.3%
Spain	41.0%	17.9%	41.0%
Sweden	50.0%	42.9%	7.1%
Switzerland	25.0%	33.3%	41.7%
Thailand	62.5%	25.0%	12.5%
United Arab Emirates	50.0%	42.9%	7.1%
United Kingdom	43.4%	30.1%	26.5%
United States	44.4%	21.3%	34.3%

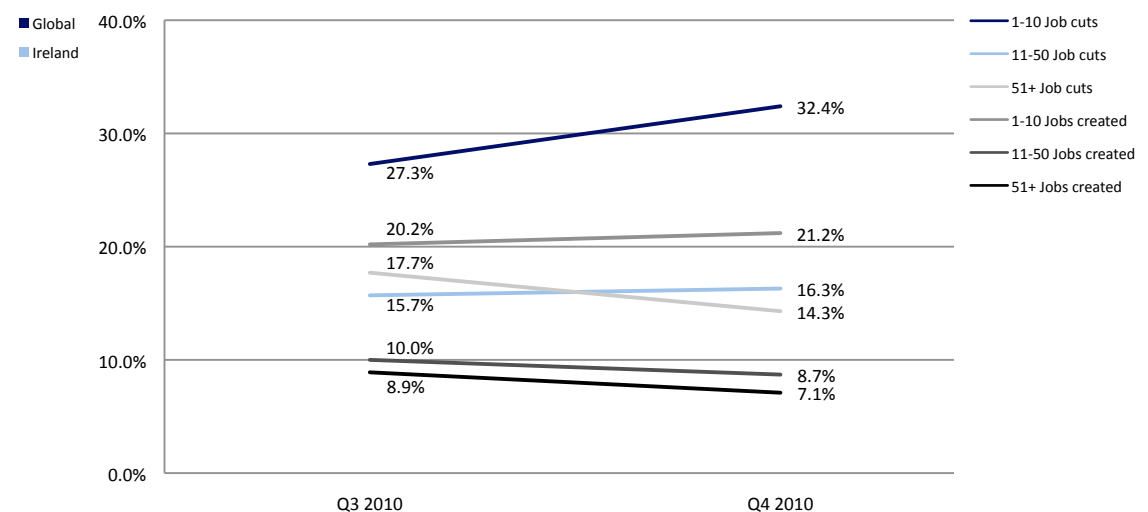
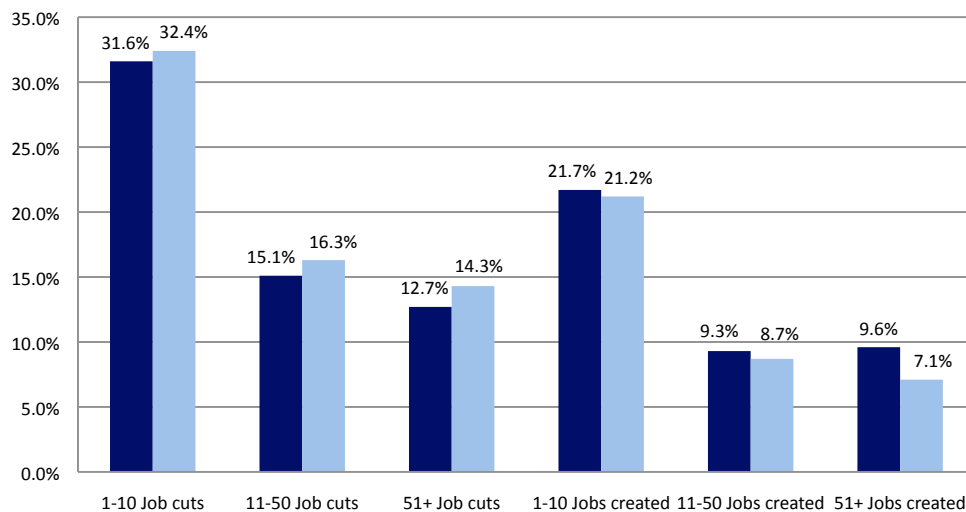


# JOB CREATION

In your own company, estimate how many jobs have been cut/created in 2010?

63% of Irish respondents believe that jobs have been cut in 2010 which is a slight increase from Q3 (60%), however, it appears that less extreme job cuts are expected with the proportion of respondents estimating job cuts of over 51 dropping from 18% in Q3 to 14% in Q4. Interestingly, although sentiments on the overall job market were more positive in Australia, a significant portion of respondents (31%) felt there would be greater than 51 job cuts.

	1-10 Job cuts	11-50 Job cuts	51+ Job cuts	1-10 Jobs created	11-50 Jobs created	51+ Jobs created
Global	31.6%	15.1%	12.7%	21.7%	9.3%	9.6%
Ireland	32.4%	16.3%	14.3%	21.2%	8.7%	7.1%
Australia	19.2%	7.7%	30.8%	26.9%	11.5%	3.8%
Belgium	28.6%	21.4%	7.1%	35.7%	0.0%	7.1%
China	8.7%	8.7%	4.3%	56.5%	13.0%	8.7%
Czech Republic	0.0%	25.0%	0.0%	25.0%	37.5%	12.5%
Finland	20.0%	30.0%	10.0%	20.0%	10.0%	10.0%
France	31.8%	9.1%	9.1%	22.7%	13.6%	13.6%
Germany	34.6%	15.4%	11.5%	19.2%	3.8%	15.4%
India	27.6%	12.1%	5.2%	22.4%	15.5%	17.2%
Indonesia	53.3%	6.7%	0.0%	33.3%	6.7%	0.0%
Italy	46.3%	12.2%	12.2%	22.0%	2.4%	4.9%
Malaysia	31.8%	18.2%	0.0%	27.3%	13.6%	9.1%
Netherlands	22.2%	11.1%	22.2%	22.2%	3.7%	18.5%
New Zealand	42.9%	14.3%	0.0%	42.9%	0.0%	0.0%
Philippines	39.6%	14.3%	4.4%	19.8%	7.7%	14.3%
Poland	23.1%	23.1%	0.0%	7.7%	15.4%	30.8%
Saudi Arabia	33.3%	16.7%	0.0%	33.3%	0.0%	16.7%
Singapore	28.6%	14.7%	12.4%	21.7%	13.4%	9.2%
South Africa	28.6%	28.6%	0.0%	28.6%	14.3%	0.0%
Spain	30.6%	13.9%	19.4%	16.7%	8.3%	11.1%
Sweden	0.0%	21.4%	7.1%	50.0%	7.1%	14.3%
Switzerland	25.0%	25.0%	16.7%	25.0%	8.3%	0.0%
Thailand	62.5%	12.5%	0.0%	12.5%	12.5%	0.0%
United Arab Emirates	35.7%	35.7%	0.0%	7.1%	7.1%	14.3%
United Kingdom	33.3%	10.1%	13.2%	17.1%	9.3%	17.1%
United States	22.8%	11.9%	17.8%	23.8%	6.9%	16.8%

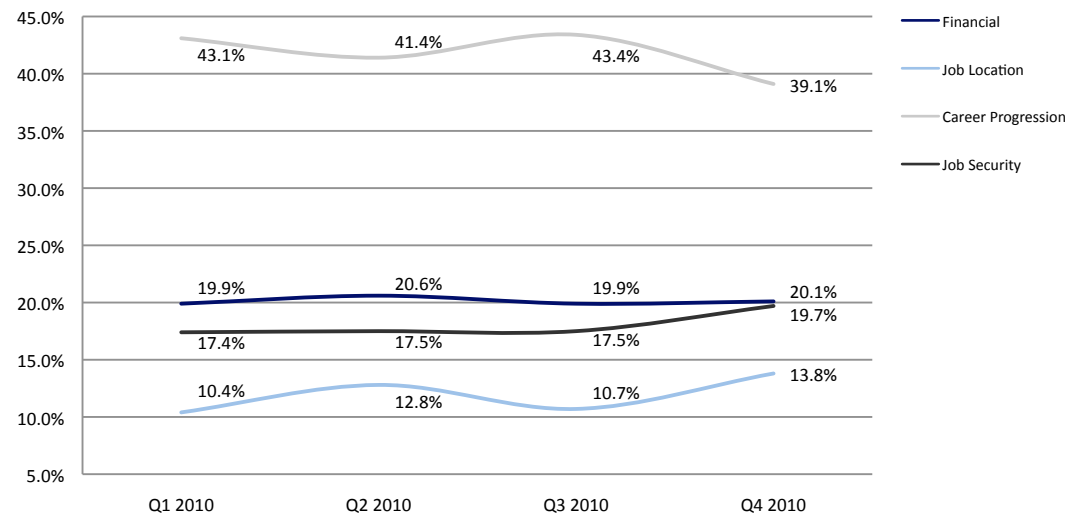
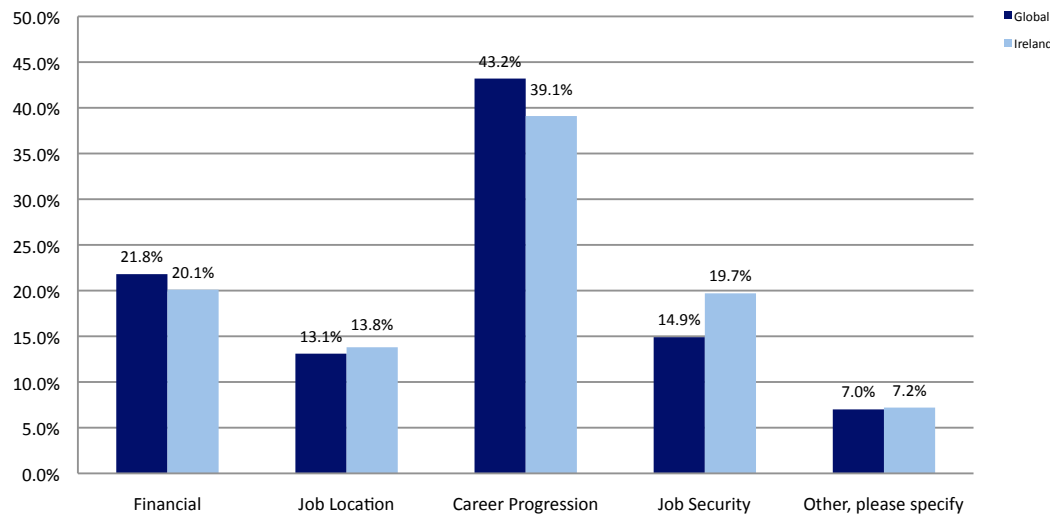


# JOB MOVE MOTIVATIONS

## What most motivates your desire to move job?

Career progression continues to have the strongest influence on job moves in Ireland with 39% of respondents stating this is their primary motivation. This figure has dipped slightly below the global average of 43%. Job security is becoming an increasingly important consideration in Ireland and now 20% of respondents state this is their motivation for a job move. This remains higher than the global average (15%), and dwarfs the impact of this factor in countries such as Australia where only 4% see this as their primary motivation. This is surely linked to the sentiments where 85% feel there are enough job opportunities in the market, compared to only 36% in Ireland.

	Financial	Job Location	Career Progression	Job Security	Other, please specify
Global	21.8%	13.1%	43.2%	14.9%	7.0%
Ireland	20.1%	13.8%	39.1%	19.7%	7.2%
Australia	3.8%	30.8%	53.8%	3.8%	7.7%
Belgium	13.3%	40.0%	26.7%	13.3%	6.7%
China	20.8%	16.7%	37.5%	16.7%	8.3%
Czech Republic	25.0%	12.5%	37.5%	0.0%	25.0%
Finland	18.2%	0.0%	63.6%	9.1%	9.1%
France	12.5%	20.8%	54.2%	4.2%	8.3%
Germany	21.4%	17.9%	53.6%	7.1%	0.0%
India	20.0%	15.0%	53.3%	10.0%	1.7%
Indonesia	43.8%	18.8%	37.5%	0.0%	0.0%
Italy	18.6%	16.3%	58.1%	7.0%	0.0%
Malaysia	39.1%	8.7%	43.5%	8.7%	0.0%
Netherlands	32.1%	17.9%	32.1%	7.1%	10.7%
New Zealand	37.5%	0.0%	62.5%	0.0%	0.0%
Philippines	41.9%	6.5%	38.7%	9.7%	3.2%
Poland	23.1%	7.7%	46.2%	15.4%	7.7%
Saudi Arabia	0.0%	28.6%	57.1%	14.3%	0.0%
Singapore	22.4%	4.4%	55.7%	11.0%	6.6%
South Africa	14.3%	14.3%	28.6%	14.3%	28.6%
Spain	23.1%	23.1%	46.2%	2.6%	5.1%
Sweden	14.3%	7.1%	50.0%	14.3%	14.3%
Switzerland	8.3%	16.7%	58.3%	8.3%	8.3%
Thailand	12.5%	25.0%	25.0%	0.0%	37.5%
United Arab Emirates	14.3%	14.3%	64.3%	7.1%	0.0%
United Kingdom	26.8%	8.0%	41.3%	10.9%	13.0%
United States	16.5%	13.8%	45.0%	14.7%	10.1%

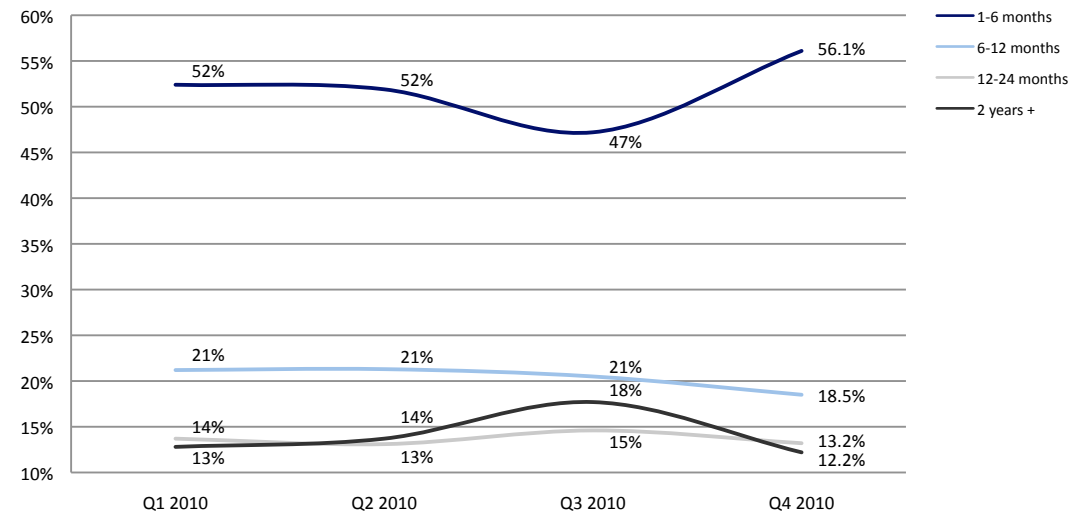
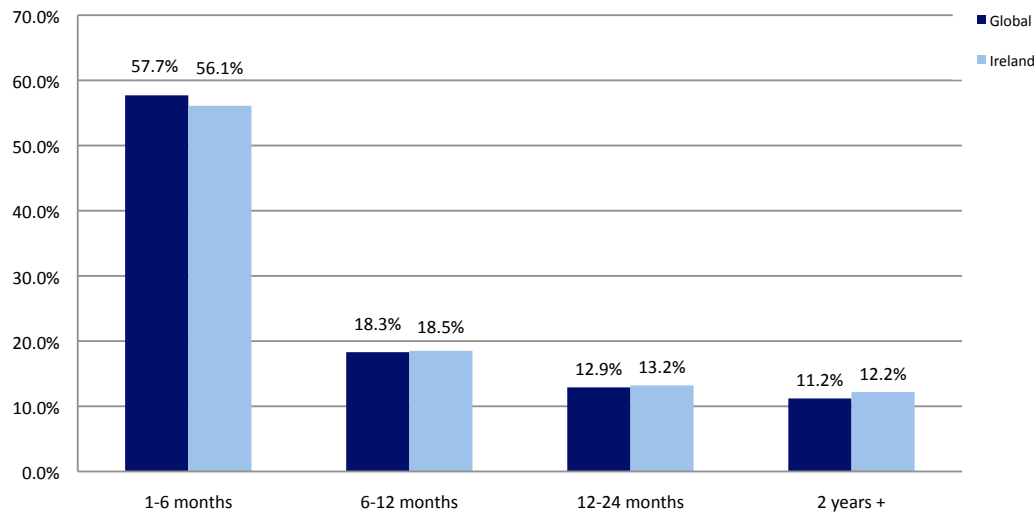


# JOB MOVE TIMING

## When would you consider / like your next job move?

With the Irish workforce appearing more optimistic about opportunities in 2011, the number of respondents looking to move jobs in the coming 6 months has risen by 9% to 56%. This is comparable with the global figure of 58% and similar to a number of their European counterparts; France (58%), Italy (57%), Netherlands (75%) and UK (59%).

	1-6 months	6-12 months	12-24 months	2 years +
<b>Global</b>	57.7%	18.3%	12.9%	11.2%
<b>Ireland</b>	56.1%	18.5%	13.2%	12.2%
<b>Australia</b>	50.0%	19.2%	23.1%	7.7%
<b>Belgium</b>	33.3%	26.7%	20.0%	20.0%
<b>China</b>	62.5%	16.7%	12.5%	8.3%
<b>Czech Republic</b>	50.0%	25.0%	12.5%	12.5%
<b>Finland</b>	36.4%	27.3%	27.3%	9.1%
<b>France</b>	58.3%	12.5%	16.7%	12.5%
<b>Germany</b>	53.6%	21.4%	14.3%	10.7%
<b>India</b>	59.3%	25.4%	5.1%	10.2%
<b>Indonesia</b>	75.0%	0.0%	0.0%	25.0%
<b>Italy</b>	57.1%	26.2%	11.9%	4.8%
<b>Malaysia</b>	69.6%	13.0%	4.3%	13.0%
<b>Netherlands</b>	57.1%	17.9%	21.4%	3.6%
<b>New Zealand</b>	25.0%	0.0%	25.0%	50.0%
<b>Philippines</b>	65.9%	17.6%	5.5%	11.0%
<b>Poland</b>	58.3%	16.7%	16.7%	8.3%
<b>Saudi Arabia</b>	71.4%	14.3%	14.3%	0.0%
<b>Singapore</b>	64.9%	13.5%	13.1%	8.6%
<b>South Africa</b>	71.4%	28.6%	0.0%	0.0%
<b>Spain</b>	51.4%	16.2%	16.2%	16.2%
<b>Sweden</b>	64.3%	7.1%	7.1%	21.4%
<b>Switzerland</b>	50.0%	25.0%	16.7%	8.3%
<b>Thailand</b>	75.0%	12.5%	0.0%	12.5%
<b>United Arab Emirates</b>	57.1%	28.6%	7.1%	7.1%
<b>United Kingdom</b>	59.0%	20.1%	13.4%	7.5%
<b>United States</b>	61.5%	11.9%	11.9%	14.7%

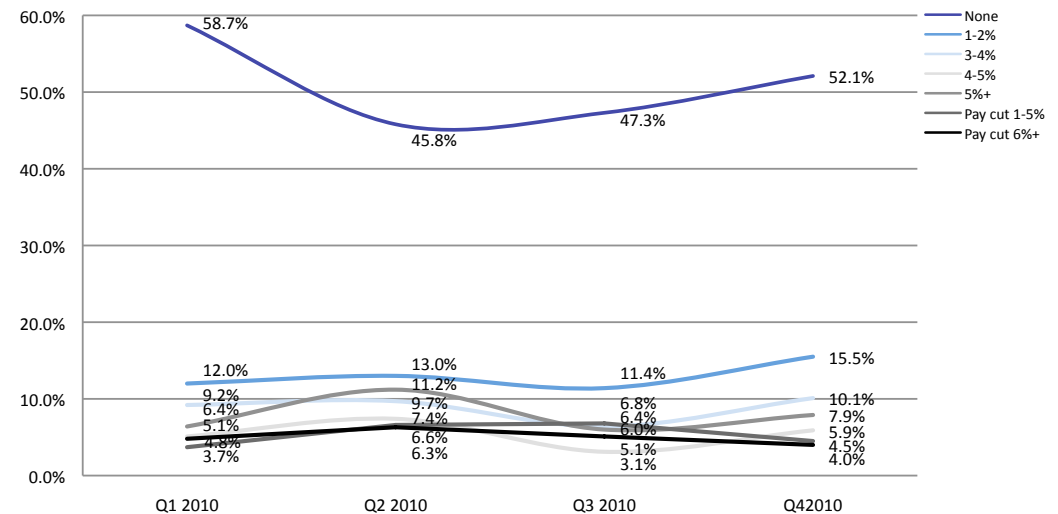
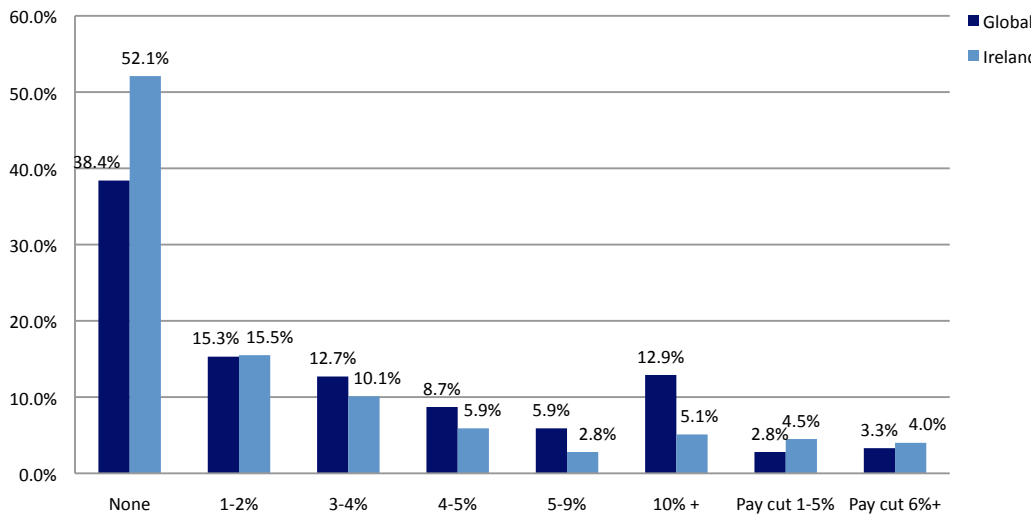


# PAY RISE EXPECTATIONS

For 2011 and your salary review, what pay rise/cut do you expect?

The majority of Irish respondents are not expecting a pay rise over the next year with 61% expecting that pay will stay the same or actually decrease. Private sector workers continue to be realistic and adjust their lives accordingly. Although a lower figure than Q1 (67%) it is much more bearish than global employment sentiment, with only 45% with similar pay expectations. Although figures of moderate pay rises in Ireland almost mirror the global data we see a lower level of optimism in the higher pay rises – only 5.1% of Irish respondents expect a pay rise of 10% or more in 2011, this is significantly lower than the global figure (12.9%) and is dwarfed by optimistic Asian respondents - Philippines (47%), Singapore (27%), Thailand (31%) – who are all expecting a bumper pay day.

	None	1-2%	3-4%	4-5%	5-9%	10% +	Pay cut 1-5%	Pay cut 6%+
Global	38.4%	15.3%	12.7%	8.7%	5.9%	12.9%	2.8%	3.3%
Ireland	52.1%	15.5%	10.1%	5.9%	2.8%	5.1%	4.5%	4.0%
Australia	15.4%	11.5%	26.9%	19.2%	11.5%	15.4%	0.0%	0.0%
Belgium	53.3%	13.3%	6.7%	6.7%	0.0%	20.0%	0.0%	0.0%
China	26.1%	4.3%	8.7%	17.4%	21.7%	21.7%	0.0%	0.0%
Czech Republic	25.0%	0.0%	0.0%	12.5%	25.0%	25.0%	12.5%	0.0%
Finland	27.3%	54.5%	9.1%	0.0%	9.1%	0.0%	0.0%	0.0%
France	4.2%	20.8%	25.0%	25.0%	8.3%	16.7%	0.0%	0.0%
Germany	44.4%	7.4%	14.8%	22.2%	3.7%	7.4%	0.0%	0.0%
India	13.6%	1.7%	5.1%	10.2%	8.5%	59.3%	0.0%	1.7%
Indonesia	6.3%	0.0%	6.3%	6.3%	37.5%	37.5%	6.3%	0.0%
Italy	46.5%	20.9%	9.3%	9.3%	4.7%	7.0%	2.3%	0.0%
Malaysia	8.7%	8.7%	26.1%	26.1%	4.3%	26.1%	0.0%	0.0%
Netherlands	17.9%	21.4%	25.0%	7.1%	7.1%	10.7%	3.6%	7.1%
New Zealand	12.5%	37.5%	12.5%	12.5%	12.5%	12.5%	0.0%	0.0%
Philippines	5.7%	11.4%	9.1%	14.8%	11.4%	46.6%	0.0%	1.1%
Poland	30.8%	7.7%	15.4%	7.7%	15.4%	23.1%	0.0%	0.0%
Saudi Arabia	0.0%	14.3%	14.3%	28.6%	14.3%	28.6%	0.0%	0.0%
Singapore	16.1%	9.9%	18.4%	12.1%	14.8%	26.5%	0.4%	1.8%
South Africa	0.0%	28.6%	14.3%	28.6%	0.0%	28.6%	0.0%	0.0%
Spain	39.5%	21.1%	7.9%	10.5%	5.3%	7.9%	5.3%	2.6%
Sweden	35.7%	28.6%	21.4%	0.0%	0.0%	14.3%	0.0%	0.0%
Switzerland	0.0%	45.5%	27.3%	0.0%	9.1%	9.1%	0.0%	9.1%
Thailand	0.0%	0.0%	37.5%	25.0%	0.0%	37.5%	0.0%	0.0%
United Arab Emirates	23.1%	23.1%	0.0%	15.4%	7.7%	30.8%	0.0%	0.0%
United Kingdom	38.5%	22.2%	16.3%	6.7%	0.7%	8.9%	2.2%	4.4%
United States	28.6%	20.0%	23.8%	8.6%	6.7%	5.7%	1.0%	5.7%

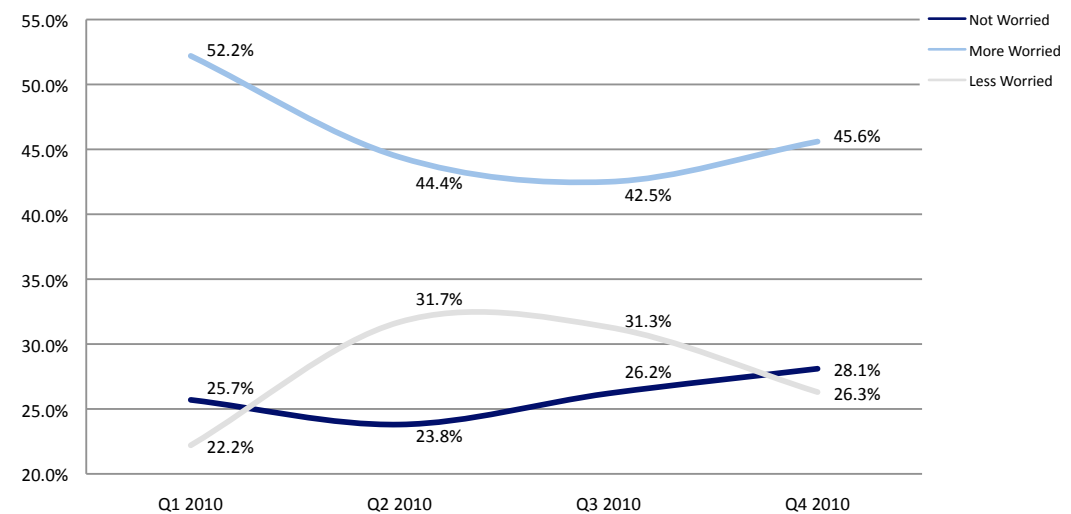
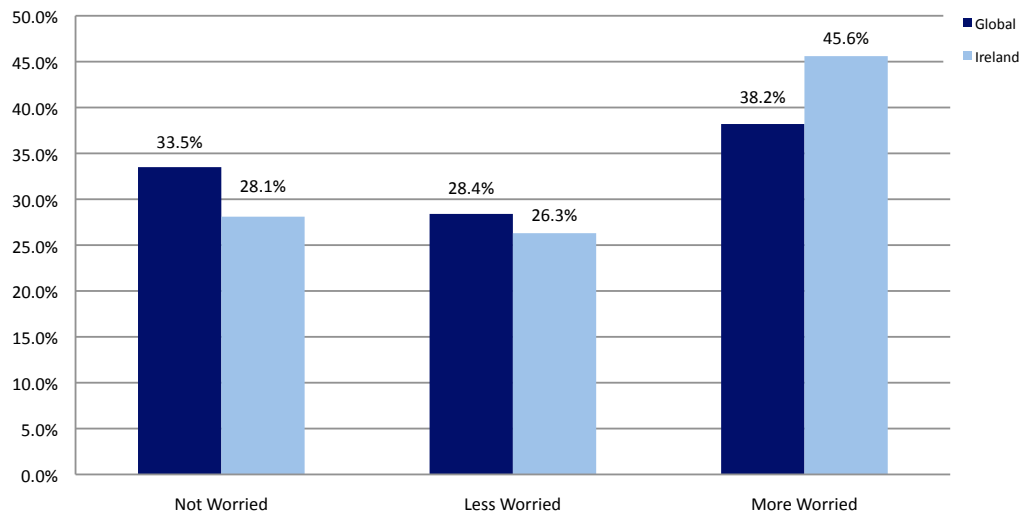


# JOB SECURITY

## Are you more or less worried about job security than 12 months ago?

Despite the fallout from the EU and IMF bailout, sentiments on job security have remained relatively stable with 46% of respondents in Ireland “more worried” about their jobs than 12 months ago – this compares to 43% in Q3. This figure is much lower than the 75% of respondents who were more worried about their jobs in Q1 in the aftermath of the financial crisis. Increased confidence levels on job security can be found in China, where 87% of respondents are not worried about their job security.

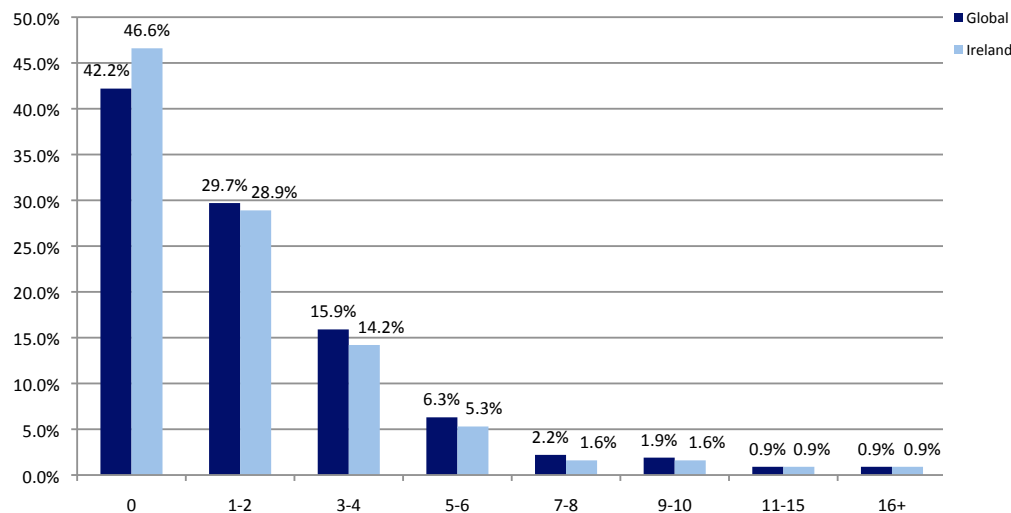
	Not Worried	Less Worried	More Worried
Global	33.5%	28.4%	38.2%
Ireland	28.1%	26.3%	45.6%
Australia	46.2%	38.5%	15.4%
Belgium	66.7%	20.0%	13.3%
China	52.2%	34.8%	13.0%
Czech Republic	62.5%	37.5%	0.0%
Finland	36.4%	36.4%	27.3%
France	45.8%	33.3%	20.8%
Germany	53.6%	14.3%	32.1%
India	48.3%	30.0%	21.7%
Indonesia	62.5%	18.8%	18.8%
Italy	34.9%	20.9%	44.2%
Malaysia	47.8%	34.8%	17.4%
Netherlands	46.4%	10.7%	42.9%
New Zealand	12.5%	50.0%	37.5%
Philippines	42.4%	33.7%	23.9%
Poland	30.8%	61.5%	7.7%
Saudi Arabia	66.7%	16.7%	16.7%
Singapore	34.1%	42.9%	23.0%
South Africa	28.6%	42.9%	28.6%
Spain	34.2%	10.5%	55.3%
Sweden	42.9%	35.7%	21.4%
Switzerland	50.0%	16.7%	33.3%
Thailand	25.0%	50.0%	25.0%
United Arab Emirates	28.6%	28.6%	42.9%
United Kingdom	39.4%	21.9%	38.7%
United States	32.4%	25.9%	41.7%



# SICK DAYS

In last calendar year, how many sick leave days did you take?

The Irish workforce appear to be toughing it out, or staying extremely healthy, as 47% took 0 sick days in the last calendar year, this is similar to the UK figure of 49% and higher than the global average of 42%. These figures are very encouraging to Irish employers as the workforce are proving to be amongst the hardest working and healthy globally.

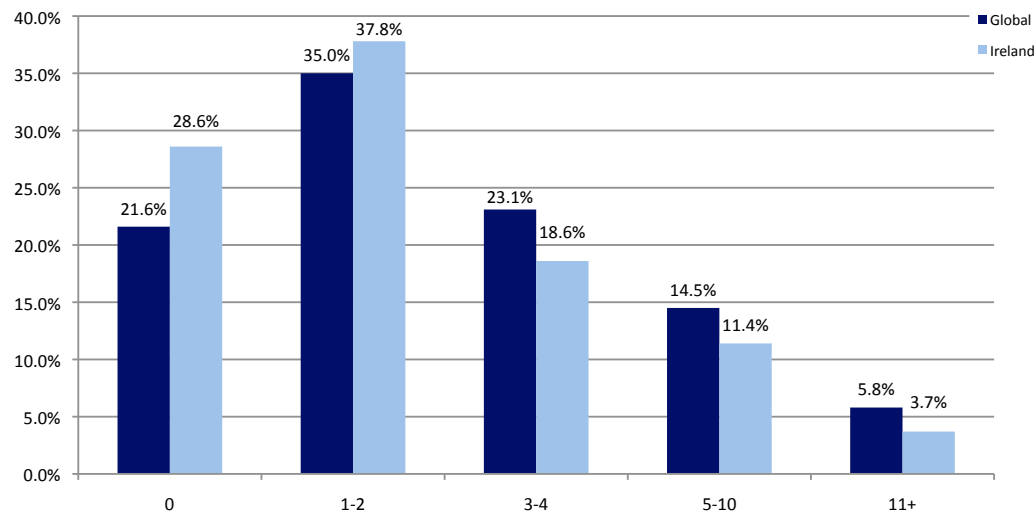


	0	1-2	3-4	5-6	7-8	9-10	11-15	16+
<b>Global</b>	42.2%	29.7%	15.9%	6.3%	2.2%	1.9%	0.9%	0.9%
<b>Ireland</b>	46.6%	28.9%	14.2%	5.3%	1.6%	1.6%	0.9%	0.9%
<b>Australia</b>	34.6%	34.6%	30.8%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Belgium</b>	60.0%	33.3%	0.0%	0.0%	0.0%	0.0%	6.7%	0.0%
<b>China</b>	58.3%	16.7%	16.7%	4.2%	4.2%	0.0%	0.0%	0.0%
<b>Czech Republic</b>	50.0%	12.5%	0.0%	0.0%	0.0%	12.5%	12.5%	12.5%
<b>Finland</b>	36.4%	18.2%	18.2%	18.2%	0.0%	0.0%	9.1%	0.0%
<b>France</b>	58.3%	29.2%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Germany</b>	29.6%	25.9%	22.2%	14.8%	0.0%	0.0%	0.0%	7.4%
<b>India</b>	20.3%	27.1%	22.0%	18.6%	8.5%	1.7%	0.0%	1.7%
<b>Indonesia</b>	37.5%	37.5%	12.5%	12.5%	0.0%	0.0%	0.0%	0.0%
<b>Italy</b>	46.5%	32.6%	11.6%	9.3%	0.0%	0.0%	0.0%	0.0%
<b>Malaysia</b>	13.0%	47.8%	17.4%	8.7%	4.3%	4.3%	4.3%	0.0%
<b>Netherlands</b>	39.3%	32.1%	10.7%	7.1%	3.6%	3.6%	0.0%	3.6%
<b>New Zealand</b>	50.0%	25.0%	12.5%	12.5%	0.0%	0.0%	0.0%	0.0%
<b>Philippines</b>	22.5%	33.7%	20.2%	11.2%	3.4%	6.7%	1.1%	1.1%
<b>Poland</b>	69.2%	0.0%	15.4%	15.4%	0.0%	0.0%	0.0%	0.0%
<b>Saudi Arabia</b>	57.1%	14.3%	28.6%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Singapore</b>	21.9%	33.0%	25.0%	9.8%	7.1%	1.8%	1.3%	0.0%
<b>South Africa</b>	42.9%	42.9%	14.3%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Spain</b>	52.6%	26.3%	10.5%	7.9%	2.6%	0.0%	0.0%	0.0%
<b>Sweden</b>	42.9%	50.0%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%
<b>Switzerland</b>	58.3%	25.0%	16.7%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Thailand</b>	0.0%	50.0%	37.5%	12.5%	0.0%	0.0%	0.0%	0.0%
<b>United Arab Emirates</b>	21.4%	57.1%	7.1%	14.3%	0.0%	0.0%	0.0%	0.0%
<b>United Kingdom</b>	48.5%	28.7%	13.2%	1.5%	1.5%	4.4%	0.0%	2.2%
<b>United States</b>	54.1%	31.2%	10.1%	2.8%	0.0%	0.9%	0.0%	0.9%

# HEADHUNTER APPROACHES

How many approaches have you had from recruiters/headhunters in last 3 months re job opportunities?

It appears that Irish respondents are experiencing fewer approaches from headhunters over the last 3 months, with 29% receiving no approaches at all. This is higher than the global average of 22%. If we look at the proportion of respondents getting over 2 contacts, we see a figure of 34% in Ireland, compared to the global figure of 43%. If we analyse individual countries we see a more stark comparison with 60% of respondents in the UK and 66% in Singapore receiving over 2 contacts.

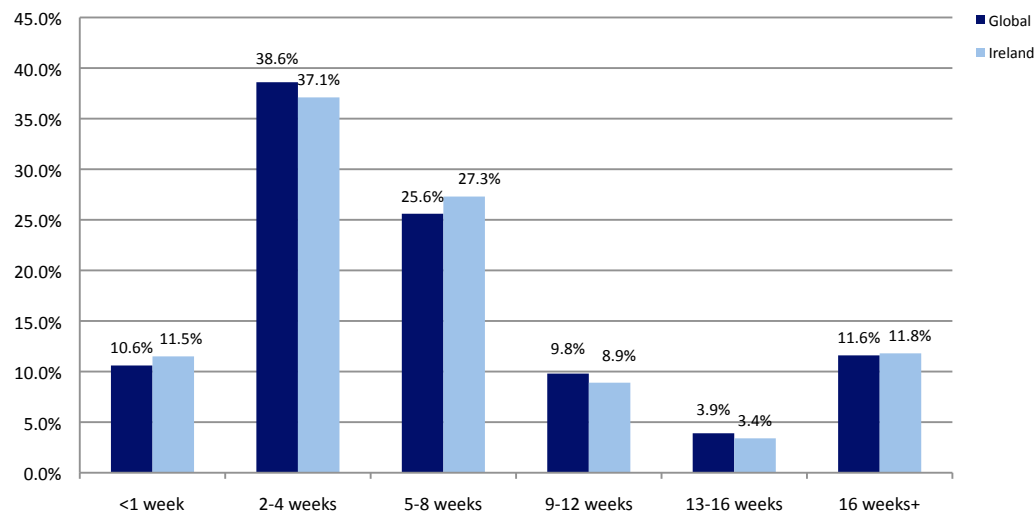


	0	1-2	3-4	5-10	11+
<b>Global</b>	21.6%	35.0%	23.1%	14.5%	5.8%
<b>Ireland</b>	28.6%	37.8%	18.6%	11.4%	3.7%
<b>Australia</b>	12.0%	28.0%	48.0%	8.0%	4.0%
<b>Belgium</b>	20.0%	33.3%	20.0%	13.3%	13.3%
<b>China</b>	4.2%	37.5%	29.2%	25.0%	4.2%
<b>Czech Republic</b>	25.0%	12.5%	37.5%	12.5%	12.5%
<b>Finland</b>	27.3%	36.4%	27.3%	0.0%	9.1%
<b>France</b>	13.0%	43.5%	13.0%	26.1%	4.3%
<b>Germany</b>	18.5%	22.2%	33.3%	11.1%	14.8%
<b>India</b>	11.7%	30.0%	28.3%	18.3%	11.7%
<b>Indonesia</b>	12.5%	37.5%	31.3%	6.3%	12.5%
<b>Italy</b>	20.9%	39.5%	20.9%	14.0%	4.7%
<b>Malaysia</b>	9.1%	40.9%	36.4%	0.0%	13.6%
<b>Netherlands</b>	10.7%	39.3%	32.1%	14.3%	3.6%
<b>New Zealand</b>	12.5%	62.5%	12.5%	12.5%	0.0%
<b>Philippines</b>	9.1%	28.4%	35.2%	21.6%	5.7%
<b>Poland</b>	23.1%	38.5%	30.8%	0.0%	7.7%
<b>Saudi Arabia</b>	0.0%	71.4%	28.6%	0.0%	0.0%
<b>Singapore</b>	8.9%	25.4%	32.1%	24.6%	8.9%
<b>South Africa</b>	14.3%	28.6%	28.6%	28.6%	0.0%
<b>Spain</b>	18.9%	32.4%	16.2%	29.7%	2.7%
<b>Sweden</b>	35.7%	35.7%	0.0%	21.4%	7.1%
<b>Switzerland</b>	16.7%	41.7%	25.0%	8.3%	8.3%
<b>Thailand</b>	12.5%	37.5%	50.0%	0.0%	0.0%
<b>United Arab Emirates</b>	14.3%	28.6%	28.6%	21.4%	7.1%
<b>United Kingdom</b>	11.8%	28.7%	24.3%	22.8%	12.5%
<b>United States</b>	15.9%	36.4%	25.2%	12.1%	10.3%

# APPLICATION PROCESS TIME

When you last looked for a job, how long did process take, from initial approach application to job offer?

12% of Irish respondents got a job within 1 week of application – a similar figure to the global results (11%) and the UK (12%). If we look to more measured four week timescale we see the proportion of Irish respondents receiving a job offer mirroring the global figure of 49%. Despite this alignment to global norms, we see significant variability at a country level. Timescales much longer in China, where 89% of respondents took over 5 weeks to receive an offer and 35% having to wait over 16 weeks for confirmation.

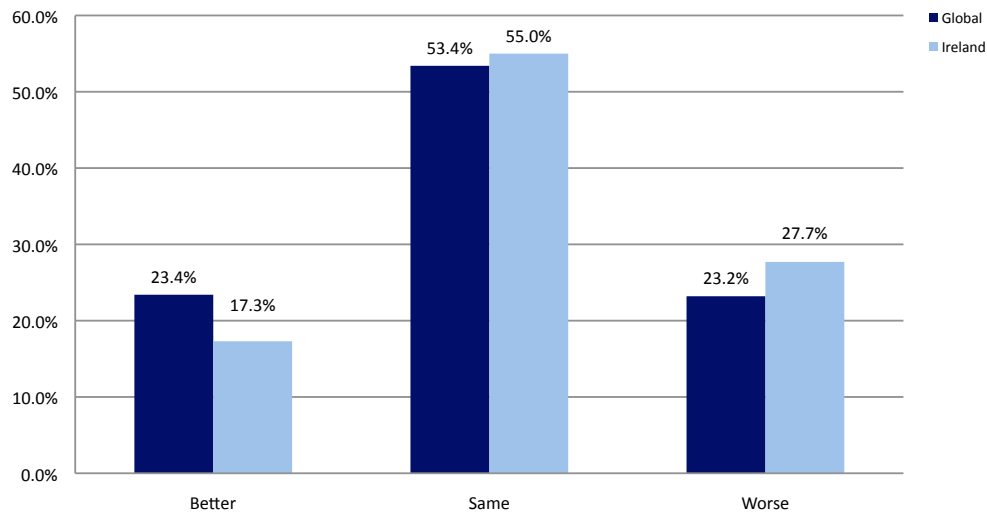


	<1 week	2-4 weeks	5-8 weeks	9-12 weeks	13-16 weeks	16 weeks+
<b>Global</b>	10.6%	38.6%	25.6%	9.8%	3.9%	11.6%
<b>Ireland</b>	11.5%	37.1%	27.3%	8.9%	3.4%	11.8%
<b>Australia</b>	7.7%	53.8%	19.2%	7.7%	7.7%	3.8%
<b>Belgium</b>	13.3%	46.7%	13.3%	6.7%	0.0%	20.0%
<b>China</b>	0.0%	12.5%	45.8%	8.3%	8.3%	25.0%
<b>Czech Republic</b>	50.0%	12.5%	12.5%	0.0%	12.5%	12.5%
<b>Finland</b>	0.0%	45.5%	18.2%	27.3%	0.0%	9.1%
<b>France</b>	4.2%	37.5%	29.2%	8.3%	8.3%	12.5%
<b>Germany</b>	0.0%	28.6%	25.0%	28.6%	3.6%	14.3%
<b>India</b>	11.7%	48.3%	21.7%	13.3%	1.7%	3.3%
<b>Indonesia</b>	6.3%	56.3%	25.0%	6.3%	0.0%	6.3%
<b>Ireland</b>	11.5%	37.1%	27.3%	8.9%	3.4%	11.8%
<b>Italy</b>	2.3%	55.8%	20.9%	4.7%	7.0%	9.3%
<b>Malaysia</b>	13.0%	43.5%	26.1%	8.7%	4.3%	4.3%
<b>Netherlands</b>	14.8%	29.6%	37.0%	3.7%	3.7%	11.1%
<b>New Zealand</b>	0.0%	25.0%	12.5%	50.0%	0.0%	12.5%
<b>Philippines</b>	28.4%	45.5%	15.9%	3.4%	3.4%	3.4%
<b>Poland</b>	7.7%	23.1%	38.5%	15.4%	7.7%	7.7%
<b>Saudi Arabia</b>	14.3%	28.6%	57.1%	0.0%	0.0%	0.0%
<b>Singapore</b>	8.6%	40.1%	24.8%	9.5%	4.1%	13.1%
<b>South Africa</b>	0.0%	85.7%	0.0%	0.0%	0.0%	14.3%
<b>Spain</b>	13.9%	41.7%	22.2%	13.9%	5.6%	2.8%
<b>Sweden</b>	14.3%	42.9%	7.1%	28.6%	7.1%	0.0%
<b>Switzerland</b>	0.0%	16.7%	25.0%	33.3%	0.0%	25.0%
<b>Thailand</b>	12.5%	62.5%	12.5%	12.5%	0.0%	0.0%
<b>United Arab Emirates</b>	15.4%	61.5%	15.4%	0.0%	0.0%	7.7%
<b>United Kingdom</b>	11.9%	36.6%	19.4%	13.4%	5.2%	13.4%
<b>United States</b>	0.9%	35.2%	25.9%	13.9%	3.7%	20.4%

# PROMOTION PROSPECTS

Compared to last year, how do you rate your promotion prospects in your present company?

Only 17% of Irish respondents believe that the possibility of promotion has actually improved in the last 12 months. The proportion communicating these sentiments compares to respondents in the UK (28%), Germany (29%) and France (42%) as well as 27% of responders in Singapore who feel that they are better placed for promotion this year.

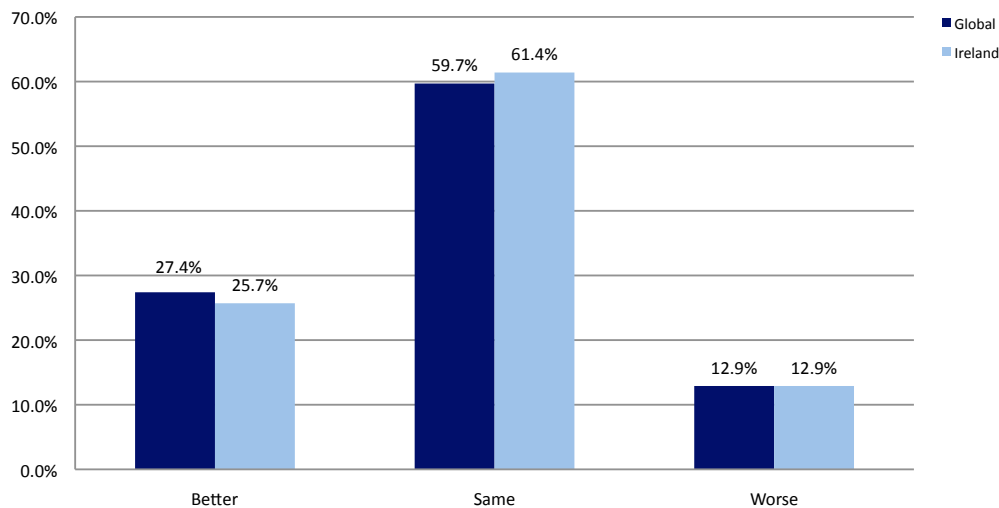


	Better	Same	Worse
<b>Global</b>	23.4%	53.4%	23.2%
<b>Ireland</b>	17.3%	55.0%	27.7%
<b>Australia</b>	34.6%	65.4%	0.0%
<b>Belgium</b>	28.6%	50.0%	21.4%
<b>China</b>	37.5%	50.0%	12.5%
<b>Czech Republic</b>	62.5%	12.5%	25.0%
<b>Finland</b>	0.0%	81.8%	18.2%
<b>France</b>	41.7%	50.0%	8.3%
<b>Germany</b>	28.6%	42.9%	28.6%
<b>India</b>	55.0%	38.3%	6.7%
<b>Indonesia</b>	31.3%	56.3%	12.5%
<b>Italy</b>	23.3%	46.5%	30.2%
<b>Malaysia</b>	21.7%	65.2%	13.0%
<b>Netherlands</b>	26.9%	50.0%	23.1%
<b>New Zealand</b>	37.5%	62.5%	0.0%
<b>Philippines</b>	31.0%	54.0%	14.9%
<b>Poland</b>	38.5%	53.8%	7.7%
<b>Saudi Arabia</b>	42.9%	57.1%	0.0%
<b>Singapore</b>	26.6%	55.4%	18.0%
<b>South Africa</b>	42.9%	42.9%	14.3%
<b>Spain</b>	21.1%	57.9%	21.1%
<b>Sweden</b>	28.6%	35.7%	35.7%
<b>Switzerland</b>	8.3%	75.0%	16.7%
<b>Thailand</b>	25.0%	37.5%	37.5%
<b>United Arab Emirates</b>	15.4%	46.2%	38.5%
<b>United Kingdom</b>	28.4%	53.0%	18.7%
<b>United States</b>	24.1%	51.9%	24.1%

# WORK STANDARD CHANGES

Compared to last year, how would you rate the standard of work being carried out by your colleagues? If worse, why?

13% of the Irish workforce believes that the quality of work by their colleagues has reduced over the last 12 months, this is consistent with the global average. Although none of the respondents from Australia, Finland and Saudi Arabia felt that there had been a drop, 24% of US respondents agreed that there had been a reduction in performance. In Ireland, 42% of respondents feel that it is because colleagues are too busy, with 31% putting it down to the lack of motivation from management.



	Too busy / overstretched so standards have suffered	Lack of motivation by management	Business very good and replacements hard to find so standards not as important	Lost interest in company
<b>Global</b>	39.1%	38.4%	2.4%	20.2%
<b>Ireland</b>	41.7%	31.4%	1.3%	25.6%
<b>Australia</b>	0.0%	0.0%	0.0%	0.0%
<b>Belgium</b>	100.0%	0.0%	0.0%	0.0%
<b>China</b>	100.0%	0.0%	0.0%	0.0%
<b>Czech Republic</b>	0.0%	100.0%	0.0%	0.0%
<b>Finland</b>	0.0%	0.0%	0.0%	0.0%
<b>France</b>	75.0%	0.0%	0.0%	25.0%
<b>Germany</b>	33.3%	66.7%	0.0%	0.0%
<b>India</b>	16.7%	83.3%	0.0%	0.0%
<b>Indonesia</b>	0.0%	100.0%	0.0%	0.0%
<b>Ireland</b>	41.7%	31.4%	1.3%	25.6%
<b>Italy</b>	10.0%	50.0%	0.0%	40.0%
<b>Malaysia</b>	0.0%	100.0%	0.0%	0.0%
<b>Netherlands</b>	55.6%	33.3%	0.0%	11.1%
<b>New Zealand</b>	0.0%	0.0%	0.0%	0.0%
<b>Philippines</b>	25.0%	50.0%	12.5%	12.5%
<b>Poland</b>	0.0%	100.0%	0.0%	0.0%
<b>Saudi Arabia</b>	0.0%	0.0%	0.0%	0.0%
<b>Singapore</b>	23.1%	61.5%	15.4%	0.0%
<b>South Africa</b>	100.0%	0.0%	0.0%	0.0%
<b>Spain</b>	28.6%	42.9%	14.3%	14.3%
<b>Sweden</b>	100.0%	0.0%	0.0%	0.0%
<b>Switzerland</b>	0.0%	50.0%	0.0%	50.0%
<b>Thailand</b>	0.0%	100.0%	0.0%	0.0%
<b>United Arab Emirates</b>	25.0%	75.0%	0.0%	0.0%
<b>United Kingdom</b>	56.5%	17.4%	0.0%	26.1%
<b>United States</b>	46.2%	42.3%	0.0%	11.5%



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