



Migrant Worker Estimate: December 2023

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Executive Summary

This report attempts to estimate the number of non-Irish nationals in employment in Ireland, using a variety of the most up-to-date data sources available. These include surveys conducted by the Central Statistics Office, as well as various statistical releases issued by various government departments that track their interactions with non-nationals.

Using the most up-to-date release from the Labour Force Survey, we can estimate that there are just over 500,000 non-nationals in employment in Ireland (more specifically, 531,800 as of Q3 2023). While this is a snapshot based off a representative sample, the findings are corroborated by other data sources on work permit issuances, the population of those under the various permit types, as well as other CSO population estimates. As an example, the most recent estimates of the total population from April 2023 show the population of non-nationals has increased to just over 700,000, with recent growth mirroring the growth in those estimated to be in employment.

Figure 1 – Population and Migration Estimates, all nationalities, 2006 – 2023, thousands

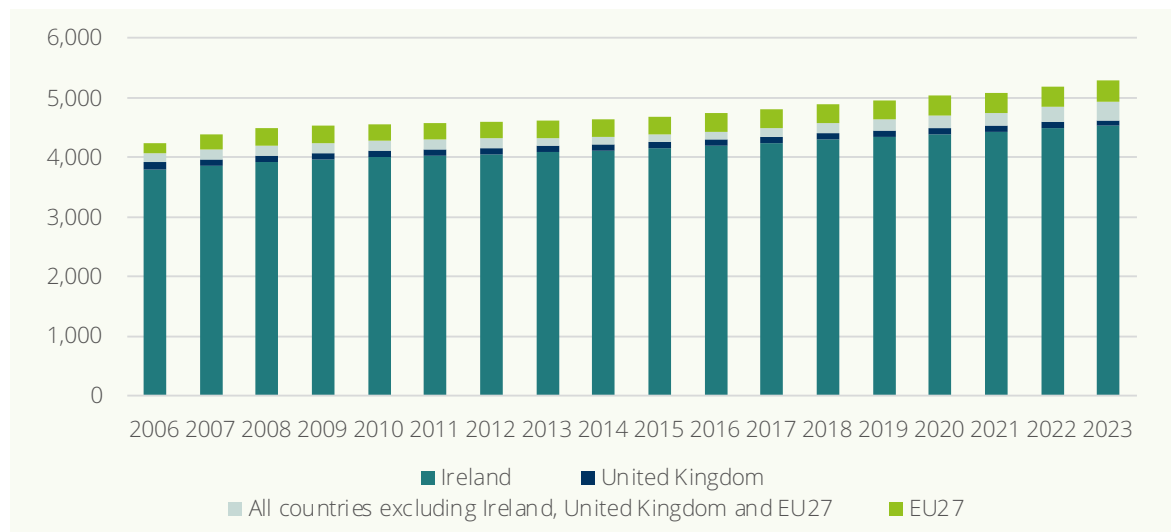
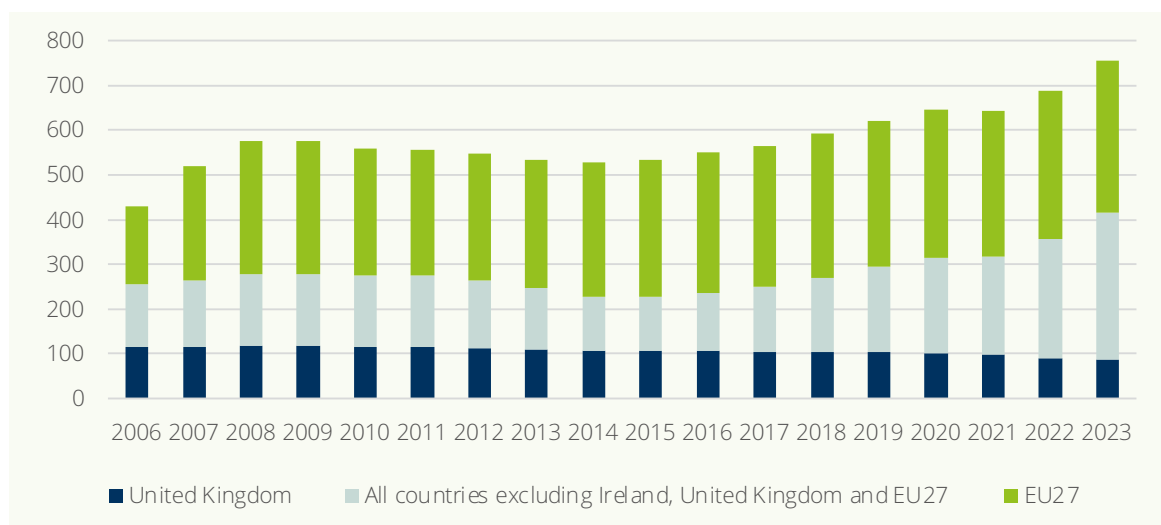


Figure 2 – Population and Migration Estimates, non-nationals only, 2006 – 2023, thousands



The LFS also has the benefit of showing us in which NACE economic sectors non-nationals are employed. This will be examined in Section 2, along with the non-national share of employment in each sector and how this has changed over time.

Section 3 will look at D/ETE data on the issuances of work permits by NACE economic sector and nationality, and some shorter-term trends of each.

Section 4 will look at D/Justice figures on the numbers of individuals with active work permits at the end of each year. This data also has the benefit of providing further breakdowns into those living in Ireland for employment, education, or family reasons, along with others.

Section 5 will finish by looking at DSP data showing the number of PRSI contributors by nationality. While this data is less reliable and the figures differ from the other estimates, it gives us an interesting insight into nationalities that are well represented that would not be captured by D/Justice data, such as those from EU Member States who would not require permits, and supplements our findings from the previous sections.

LFS Data

The CSO's Labour Force Survey (LFS) is a detailed quarterly release from which most up-to-date labour market statistics are drawn. Among other indicators, the LFS breaks employment down by citizenship as well as ILO economic status and the NACE economic sector of employment.

From the outset, it is important to note that until 2020, the Labour Force Survey instead used nationality rather than citizenship as an indicator. While this change from nationality to citizenship from Q1 2020 technically represents a break in the series, it does not appear that there is any large jump or drop in the figures for any particular group, hence the series is presented below as unbroken.

Table 1 below shows the number of non-Irish workers in each of the NACE economic sectors in 2002, 2007, 2012, 2017, and 2022, as well as the latest estimate available (Q3 2023). Annual estimates were generated by taking an average of the 4 quarters provided in the Labour Force Survey.

We can see that in the latest data, the number of non-Irish individuals in employment has exceeded 500,000 for the first time, comprising about 20% of those in employment. This varies from 34.2% in Information and communication (J), to 5.6% in Public administration and defence, compulsory social security (O), with data unavailable for Agriculture, forestry and fishing (A) (presumably due to low response numbers for non-nationals working in this sector).

Both the number and proportion of non-nationals in employment in Ireland has increased dramatically since the turn of the century, stagnating for several years during the Great Recession, before beginning to increase again in the latter half of the 2010s.

The LFS provides further breakdowns into citizenship groups:

- United Kingdom
- EU14 (pre-2004, excluding UK and Ireland)
- EU15 to EU27 (post-2004)
- All countries excluding Ireland, UK, and EU27

While it would take up significant space to detail these breakdowns for each of the NACE categories, an example has been provided for Human health and social work activities (Q).



Table 1 – Number and proportion of non-nationals in employment by NACE economic sector, Labour Force Survey, thousands

	2002		2007		2012		2017		2022		Q3 2023	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
All NACE economic sectors	100.0	5.4%	338.5	15.2%	274.9	14.6%	336.5	15.4%	469.9	18.4%	531.8	20.0%
Agriculture, forestry and fishing (A)	2.6	2.2%	6.6	5.9%	9.5	8.7%	6.8	6.1%	N/A	N/A	N/A	N/A
Construction (F)	5.2	3.3%	40.3	17.0%	8.4	10.1%	16.4	12.7%	26.0	15.7%	35.6	21.3%
Wholesale and retail trade, repair of motor vehicles and motorcycles (G)	10.0	3.8%	48.5	15.0%	42.8	15.5%	49.6	16.4%	55.1	17.5%	66.4	20.6%
Transportation and storage (H)	3.0	3.4%	11.0	11.9%	9.9	11.9%	11.8	12.6%	20.0	17.9%	20.2	17.6%
Accommodation and food service activities (I)	13.7	11.8%	50.6	35.5%	38.7	31.3%	50.3	30.8%	47.6	28.4%	51.4	28.3%
Information and communication (J)	8.7	10.8%	14.4	17.1%	17.0	18.1%	32.3	28.0%	54.8	33.6%	60.4	34.2%
Professional, scientific and technical activities (M)	6.0	6.5%	14.7	11.7%	11.0	10.3%	16.6	12.4%	28.3	17.0%	36.8	20.7%
Administrative and support service activities (N)	5.9	8.9%	22.6	22.8%	19.0	24.7%	23.3	25.1%	31.2	29.0%	28.2	25.5%
Public administration and defence, compulsory social security (O)	1.4	1.7%	2.4	2.5%	N/A	N/A	N/A	N/A	N/A	N/A	7.5	5.6%
Education (P)	4.8	4.4%	10.1	7.4%	8.2	5.9%	12.6	7.8%	16.9	8.1%	26.6	12.1%
Human health and social work activities (Q)	11.7	6.8%	32.6	13.9%	35.6	13.9%	32.4	11.6%	64.7	19.5%	71.4	20.2%
Industry (B to E)	17.2	5.3%	57.4	18.2%	45.6	19.4%	52.0	18.4%	68.9	21.4%	74.8	23.3%
Financial, insurance and real estate activities (K, L)	3.4	4.1%	10.3	9.6%	8.7	8.5%	12.6	11.8%	21.6	16.4%	24.9	18.8%
Other NACE activities (R to U)	6.1	6.9%	16.0	15.1%	17.5	16.7%	16.2	13.8%	20.9	18.5%	22.3	18.1%

Figure 3 – Persons aged 15 years and older in employment in Human health and social work activities (Q), all nationalities, 1998 – 2023, thousands

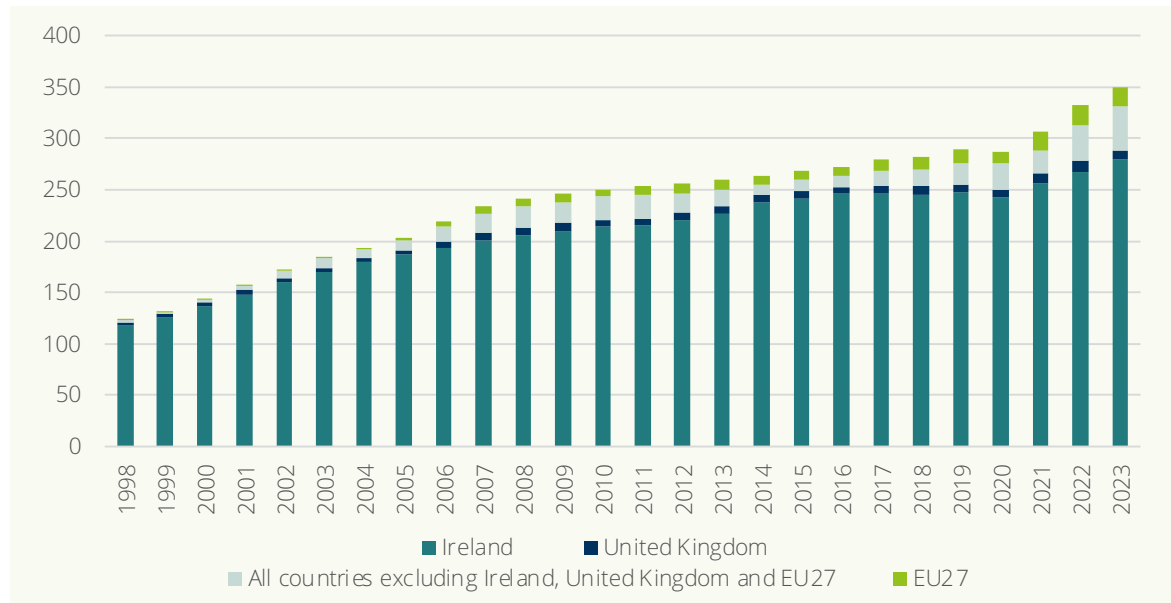
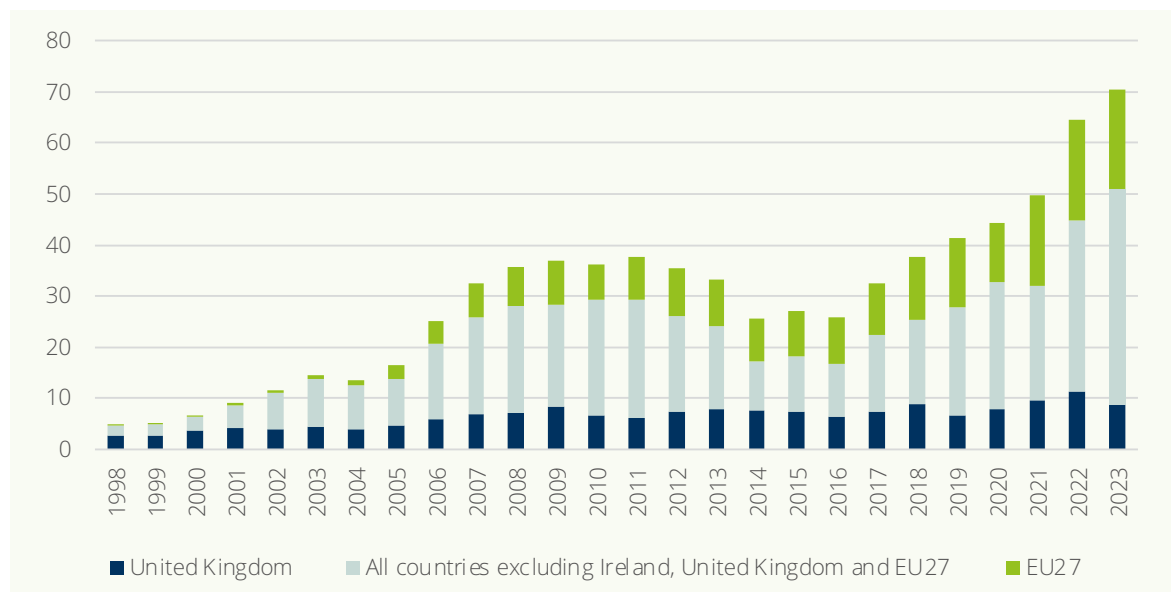


Figure 4 – Persons aged 15 years and older in employment in Human health and social work activities (Q), non-nationals only, 1998 – 2023, thousands



As we can see, not only is the proportion of non-Irish workers in this sector growing significantly, but it is also becoming more diverse, as hiring patterns change and roles are increasingly filled by those coming from outside the EU on Critical Skills or Employment Permits. This will be examined in more detail in the next section.

Department of Enterprise, Trade, and Employment Data on Employment Permits

Next, we can look at employment permits granted, both by nationality and by NACE activity. It is important to note that this is the number of permits issued, rather than the number of active permits for each sector or nationality. It gives us no indication of the population of individuals on these permits working in these sectors, just the number of new applicants in any given year.

Additionally, the activity by sector has only been coded according to NACE classifications since 2020, hence the short data series for the table below. The data for 2023 runs to the end of November.

Table 2 – Number of employment permits issued by NACE economic sector, D/ETE

	2020	2021	2022	2023 (to November)
A - Agriculture, Forestry & Fishing	1786	888	4311	1303
B - Mining & Quarrying	9	2	15	27
C - Manufacturing	785	798	2662	2804
<i>of which</i>				
Manufacture of Chemicals & Pharmaceuticals	294	274	682	817
Manufacture of Computers, Electronics & Optical Equipment	122	72	610	793
Manufacture of Food, Drink & Tobacco	104	111	357	250
Manufacture of Medical Devices	63	93	312	244
All Other Manufacturing	202	248	701	700
D - Electricity & Gas & Air Conditioning Supply	78	86	209	353
E - Water Supply - Sewerage Waste Management & Rem	11	12	25	82
F - Construction	616	607	1474	1240
G - Wholesale & Retail Trade	135	120	324	273
H - Transport & Storage	143	265	512	855
I - Accommodation & Food Services activities	814	786	2720	2439
J - Information & Communication Activities	4725	4615	10832	4469
K - Financial & insurance Activities	977	1094	3351	2199
L - Real Estate Activities	7	7	21	14
M - Professional, Scientific & Technical Activities	153	236	1460	1195
N - Administrative & Support Service Activities	29	21	86	76
O - Public Administration & Defence	1	4	41	15
P - Education	104	91	207	230
Q - Health & Social Work Activities	5197	5793	9791	9094
R - Arts, Entertainment and Recreation	239	252	340	319
S - Other Service activities	607	595	1572	1395
T - Domestic- Activities of Households as Employer	3	3	2	1
Grand Total	16419	16275	39955	28383

Some interesting trends stand out:

- Even without the final month's data for 2023, employment permit issuances are well above trend, and point to a continuing need for inward flows of workers.
- Employment permit issuances in Information and communication (J) have dropped significantly in response to the hiring slowdown and retrenchment in the tech sector.
- Hiring from abroad in healthcare, manufacturing, and professional services seems to be maintaining or extending its upward trend.
- Despite what we understand to be significant labour shortages in the Construction sector, this lack of workers is not leading to anywhere near the level of hiring that is taking place in other sectors, perhaps due to the barriers implicit in the income limits set in the Employment Permit regulations or the tendency for firms to be smaller on average in this sector.

It is also possible to see a breakdown of permits issued by nationality. Although this is less interesting from our perspective, it does demonstrate the changing shape of inward migration flows. These numbers do not include individuals coming to Ireland for education purposes, or accompanying family members who may or may not enter the labour market themselves. More complete data on these different groups is available from the Department of Justice and will be examined in the following section.

Additionally, it does not include those coming from within the EU or with citizenship of an EU Member State who do not require work permits in order to take up employment in Ireland.

These numbers do not include individuals coming to Ireland for education purposes, or accompanying family members who may or may not enter the labour market themselves

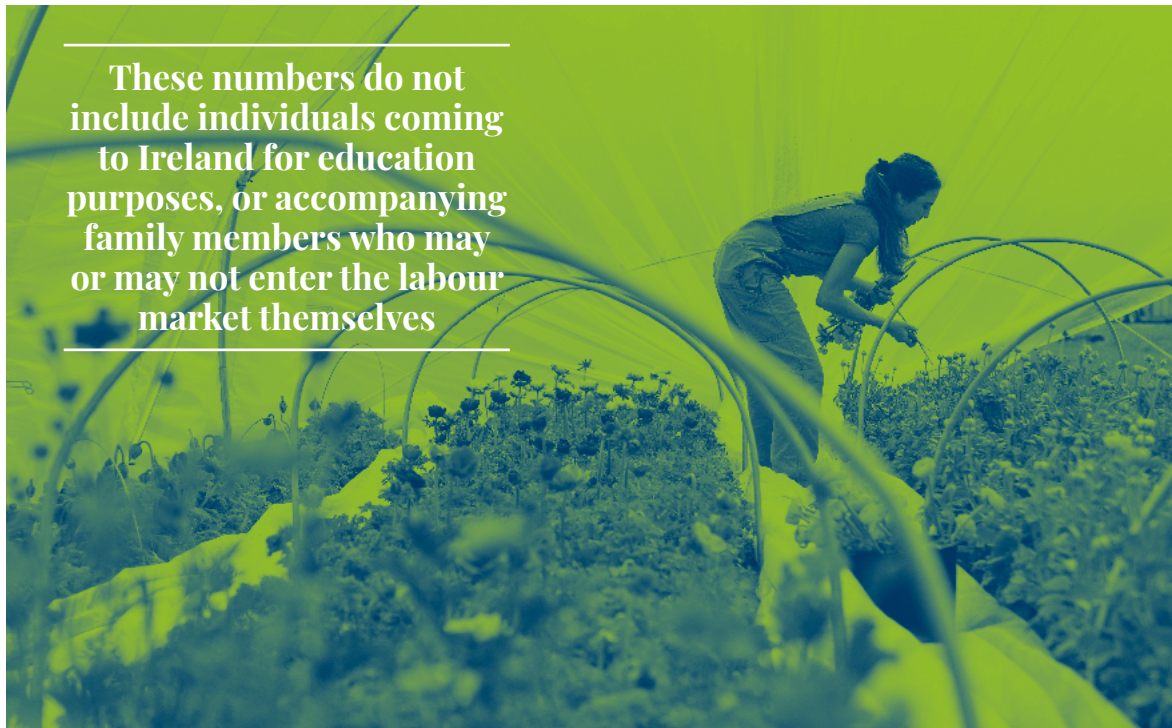


Table 3 – Number of employment permits issued by nationality, top 10 results for each year, D/ETE

2017	2018	2019	2020	2021	2022	2023							
India	3827	India	4313	India	5373	India	5565	India	6445	India	15695	India	10780
Pakistan	1008	Brazil	1426	Brazil	1565	Brazil	1799	Brazil	1098	Brazil	4304	Brazil	2426
United States of America	843	Pakistan	1026	United States of America	1038	Pakistan	978	Pakistan	1026	Philippines	2203	Philippines	2404
Philippines	768	United States of America	957	Pakistan	983	United States of America	871	Philippines	734	Pakistan	1757	Pakistan	1405
Brazil	675	Philippines	802	Philippines	783	China	833	United States of America	693	China	1497	China	1381
Sudan	469	Sudan	515	China	661	Philippines	684	Sudan	652	South Africa	1317	South Africa	1235
Egypt	349	South Africa	435	South Africa	659	Sudan	654	China	642	United States of America	1216	United States of America	956
South Africa	329	China	370	Sudan	625	South Africa	525	South Africa	616	Nigeria	1121	Nigeria	935
China	297	Egypt	347	Ukraine	479	Malaysia	483	Malaysia	404	Vietnam	779	Zimbabwe	554
Malaysia	286	Ukraine	317	Malaysia	386	Ukraine	353	Nigeria	351	Russian Federation	727	Malaysia	528
Total Other	2510	Total Other	2890	Total Other	3831	Total Other	3674	Total Other	3614	Total Other	9339	Total Other	5779
Total	11361	Total	13398	Total	16383	Total	16419	Total	16275	Total	39955	Total	28383

Department of Justice Data

The following data source comprises “all valid permits by reason, length of validity and citizenship on 31 December of each year” and is reported by the Department of Justice to Eurostat on an annual basis, running to the end of 2022.

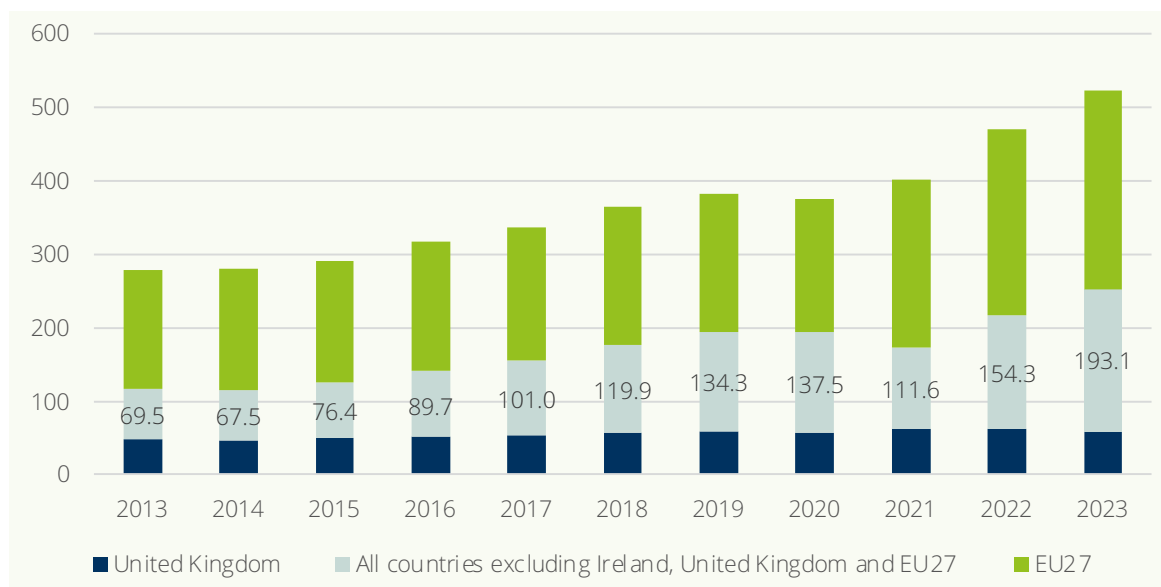
It includes variables on nationality, duration of stay, and reason for holding a permit. In contrast to the data presented above, these data show the population, rather than the annual flows, of the individuals, giving us a more complete idea of the population of non-nationals in Ireland and their reason for being here. However, it must be noted that this data is only for those who do not have the right to live and work in Ireland already, such as citizens of EU Member States, and will exclude individuals who obtain the right to live and remain in Ireland without a permit but may still be classified as non-nationals in other administrative data sources or may respond as such to surveys.

Looking at the reasons for holding a permit in the bottom half of the table, it is worth noting that other groups besides those in Ireland specifically for “employment reasons” also have the right to work to varying degrees. For example, those on a Stamp 2 visa who are studying on the Interim List of Eligible Programs are able to work up to 20 hours per week, with looser restrictions during certain periods of the year.

While this data source will inherently provide a different number to the LFS data that was previously referenced, as one is a survey, and the other is administrative data. However, the LFS does record the drop off in the population of those on permits in Ireland during the 2020 and 2021 period, before also capturing the dramatic increase in the following year. Again, not all those in Ireland with a permit will be in employment as captured by the LFS, but it provides us with more confidence in the estimates they provide if the movements are broadly mirrored.

Another thing to note is that the LFS definitions we use here are quite broad; for example, the dramatic increase in “All countries excluding Ireland, United Kingdom and EU27” would also include those who have come to Ireland under the Temporary Protection Directive but who would not need an employment permit to access the labour market. This may go some way to explaining the significant jump in this category in both 2022 and so far in 2023, along with the increased issuances in permits for family, education, and employment reasons.

Figure 5 - Persons aged 15 years and older in employment in all economic sectors, non-nationals only, 2013 – 2023, thousands



Lastly, we can see the breakdown of the top 10 nationalities who are resident in the State with the various types of work permit from 2017 to 2022. It's worth highlighting the differences in nationalities when compared with the list of those issued with employment permits as we examined in the previous section, with nationalities that initially enter through education and other means more represented here.



Table 5 – Number of permits by nationality, D/Justice

2017	2018	2019	2020	2021	2022						
Brazil	18,590	Brazil	22,236	India	29,652	India	32,366	India	40,077	India	56,723
India	17,182	India	21,604	Brazil	27,192	Brazil	22,481	Brazil	21,469	Brazil	33,940
China including Hong Kong	11,634	China including Hong Kong	12,617	China including Hong Kong	14,049	China including Hong Kong	11,769	China including Hong Kong	12,244	China including Hong Kong	15,860
United States	10,217	United States	10,448	United States	11,353	United States	9,328	United States	10,156	United States	11,637
Pakistan	7,230	Pakistan	7,428	Pakistan	7,678	Pakistan	7,553	Pakistan	8,012	Pakistan	9,819
Nigeria	5,292	Nigeria	5,657	Nigeria	6,379	Nigeria	6,466	Nigeria	6,997	Nigeria	8,665
Philippines	4,541	Philippines	5,002	Philippines	5,719	Philippines	5,904	Philippines	6,253	Philippines	8,490
Malaysia	3,436	South Africa	3,629	South Africa	4,772	South Africa	5,146	South Africa	5,868	South Africa	7,657
Canada	3,300	Malaysia	3,479	Malaysia	3,840	Malaysia	3,062	Malaysia	3,120	Türkiye	5,063
South Africa	3,144	Canada	3,454	Canada	3,687	Canada	2,920	Canada	2,983	Mexico	4,327
Total Other	43,500	Total Other	46,732	Total Other	53,976	Total Other	48,322	Total Other	52,508	Total Other	71,876
Total	128,066	Total	142,286	Total	168,297	Total	155,317	Total	169,687	Total	234,057

Department of Social Protection Data

Lastly, we will look at the top 15 PRSI Contributors by nationality between 2017 and 2021, the latest year for which this data is available. This comes from the Department of Social Protection Annual Statistical Report.

It is important to note that there is a large disparity between the numbers of non-nationals who are making PRSI contributions as per DSP, when compared with the number of non-Irish citizens who are estimated to be in the labour force in Ireland using the Labour Force Survey. It is possible that the DSP data is capturing individuals who may not be eligible for the Labour Force Survey for any number of reasons, or that it may be capturing individuals who make PRSI contributions who are not among the typical Class A PRSI contributors who most closely resemble traditional employees.

Requests have been made to both DSP and the CSO to clarify the discrepancy, as well as to request some additional breakdowns of the PRSI contributors, if possible. To date (as of 14/12/2023), the CSO has responded but DSP have not. Any forthcoming updates will be added to this report.

One reason posited for the size of the disparity between the figures is that the LFS counts those who have worked during a single week (i.e., the reference week of the respondent). In contrast, the DSP numbers are likely to be totals for those who worked at any time throughout the year. This is important as there may be a large number of workers who only enter Ireland on a seasonal basis or who may not work for a significant period of the year, but may still be counted by DSP as having made PRSI contributions.

Additionally, it isn't clear how DSP is counting individuals who may be working in more than one employment. This is also an issue when comparing LFS results with the CSO's Estimates of Payroll Employees using Administrative Data, which uses Revenue's PAYE Modernisation as the data source and counts employments rather than employees. However, the disparity is relatively smaller and would not explain the bulk of the difference between the figures on its own.

It is also possible that those who subsequently obtain Irish citizenship and respond as such to CSO surveys do not have their details updated by DSP or whoever is collating the data on PRSI contributions. For example, a recent Census 2022 release showed there are roughly 630,000 individuals who classify themselves as non-Irish in their Census returns, with another 170,000 having dual-Irish citizenship. Individuals who have been granted Irish citizenship may simply respond to the Census form that they are Irish (as is their right), but they may not be classified as such by DSP and others who have not updated their details or may not be classifying them as Irish for any other reason.

Taking into consideration all the above, it is likely that the estimate of around 530,000 non-Irish nationals in employment as of Q3 2023 is the likeliest close estimate of the number of foreign nationals in employment in Ireland, with the DSP data source below providing interesting insights into the nationality breakdown without the individual numbers themselves being necessarily the best estimate available. That being said, this assumption is open to correction if and when DSP respond with a clarification on how they arrived at their figure and how their data is collated.

Table 6 – Top 15 PRSI Contributors by nationality, 2017 - 2021

		2017		2018		2019		2020		2021	
	Country	Number of contributors	Country	Number of contributors	Country	Number of contributors	Country	Number of contributors	Country	Number of contributors	
1	Ireland	2,234,431	Ireland	2,275,296	Ireland	2,314,354	Ireland	2,322,910	Ireland	2,430,890	
2	Poland	107,857	Poland	107,428	Poland	105,446	Poland	98,826	Poland	99,558	
3	United Kingdom	86,670	United Kingdom	90,225	United Kingdom	93,756	United Kingdom	93,011	United Kingdom	96,574	
4	Romania	43,400	Romania	49,803	Romania	56,731	Romania	57,092	Romania	64,488	
5	Lithuania	34,965	Lithuania	36,167	Lithuania	36,521	Lithuania	34,997	India	43,064	
6	Brazil	21,063	Brazil	27,929	Brazil	35,872	Brazil	34,458	Lithuania	35,526	
7	Italy	20,792	Italy	23,349	India	28,104	India	32,950	Brazil	33,702	
8	Latvia	17,901	India	20,583	Italy	24,552	Italy	22,461	Italy	24,116	
9	Spain	17,692	Spain	19,823	Spain	21,073	Spain	19,486	Spain	22,569	
10	India	16,456	Latvia	18,593	Latvia	18,840	Latvia	18,219	Latvia	18,962	
11	France	15,246	France	16,176	France	16,359	Croatia	14,926	Croatia	15,482	
12	Croatia	12,461	Croatia	14,636	Croatia	15,695	France	14,530	France	14,846	
13	Germany	11,001	Germany	11,566	Germany	11,671	Germany	10,940	China	11,567	
14	Hungary	9,998	Hungary	9,957	USA	10,585	China	10,702	USA	11,034	
15	Slovakia	9,599	USA	9,603	China	10,274	USA	10,270	Germany	11,026	
	Others	263,750	Others	279,987	Others	299,101	Others	286,524	Others	290,332	
	Total	2,923,282	Total	3,011,121	Total	3,098,934	Total	3,082,302	Total	3,223,736	
	Non-National Contributors	688,851	Non-National Contributors	735,825	Non-National Contributors	784,580	Non-National Contributors	759,392	Non-National Contributors	792,846	



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