Statistics

SCIENCE AND TECHNOLOGY

THEME 9 – 3/2002

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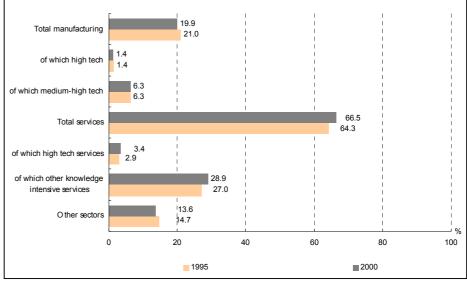


Manuscript completed on: 22.07.2002 ISSN 1609-5995 Catalogue number: KS-NS-02-003-EN-N © European Communities, 2002

National and regional employment in high tech and knowledge intensive sectors in the EU — 1995-2000

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Figure 1: Distribution of employment in the EU by selected sectors — 1995, 2000



Source: Eurostat, S&T statistics — CLFS data.

- In 2000, there were 158 million people employed in the EU, of whom 7.6 % were employed in high tech and medium-high tech manufacturing and 32.3 % in knowledge-intensive services (KIS).
- Although the proportion of employment in manufacturing seems to be on a downward trend in Europe, the percentage accounted for by high tech and medium-high tech manufacturing has remained stable since 1995.
- Germany was the country most specialised in high tech and medium-high tech manufacturing, with 11.2 % of total employment accounted for by these sectors.
- Employment in KIS in the EU is becoming increasingly important. For the 1995-2000 period it grew at an annual average growth rate of 2.9 % in the EU, which more than doubled the growth of total employment (1.3 %).
- Sweden was the country most specialised in knowledge-intensive services, with 45.7 % of its total employment accounted for by KIS.
- At the regional level, German regions are most specialised in high tech and medium-high tech manufacturing, with Stuttgart leading (21.1 % of total employment). Inner London was the region with the highest proportion of people employed in KIS (57.7 %).

In 2000, 7.6 % of employment in Europe was accounted for by high tech and medium-high tech manufacturing

In 2000, according to the Community Labour Force Survey (CLFS), 158 million people were employed in the EU, of whom 19.9 % worked in manufacturing sectors and 66.5 % in services. A slightly increasing proportion of employment is seen in the high-tech sectors, especially in services (Figure 1). In this context, this Statistics in Focus looks at the distribution and evolution of employment in high tech manufacturing and knowledge intensive services (KIS). The analysis is carried out first at the national level, followed by a study of leading European regions.

High tech and medium-high tech manufacturing sectors are defined according to their research intensity (For further details see methodological notes). In 2000, just over 12 million people were employed in high tech and medium-high tech manufacturing sectors in Europe, which amounted to 7.6 % of total European employment (Table 1). Of these, a greater proportion corresponded to mediumhigh tech industries (6.3 % of total employment) and less to high tech industries (1.4 %).

For the 1995-2000 period, employment in high tech and medium-high tech industries in the EU grew at an annual average growth rate of 1.1 %, well above the growth of total manufacturing (0.3 %), but below the growth of total employment (1.3 %).

At the Member State level, Germany accounted for the largest proportion of the EU's total employment in high tech and medium-high tech (33.6%), followed by the UK (16.8%), France (14.0%) and Italy (13.2 %). As shown in Figure 2, the country with the highest proportion of people employed in high tech and medium-high tech industries in 2000 was Germany (11.2%), followed by Sweden (7.9%), which was also above the EU average. At the other extreme, Luxembourg was the country that recorded the lowest ratio in 2000, with only 2.0 % of its workers employed in high tech and medium-high tech manufacturing sectors. For the 1995-2000 period, employment in high tech and medium-high tech grew fastest in Ireland and Finland, which recorded annual average growth rates of 6.9 % and 4.9 % respectively.

Table 1: Employment in high tech and medium-high tech manufacturing in the European Union — 1995, 2000 $\binom{l}{l}$

	Total employment	Total manufact	iring	High tech and medium high tech manufacturing					
		1995-2000		2000			1995	1995-2000	
		A	nnual average growth rates		of wh	ich high tech		Annual average growth rates	
	Thousands	Thousands	%	Thousands	%(2)	% (2)	%(2)	%	
EU-15	158 368	31 567	0.3	12 107	7.6	1.4	7.7	1.1	
В	4 120	773	0.2	284	6.9	0.8	7.8	-0.7	
DK	2 716	490	-1.2	175	6.4	1.0	7.4	-1.8	
D	36 325	8 630	-0.7	4 063	11.2	1.8	11.0	0.7	
EL.	3 946	557	-0.7	87	2.2	0.2	2.2	0.5	
E	14 450	2 713	3.0	776	5.4	0.6	5.3	4.1	
F	23 388	4 392	1.1	1 692	7.2	1.4	7.2	1.3	
IRL	1 668	292	4.4	116	7.0	3.4	6.6	6.9	
1	20 930	4 825	1.1	1 596	7.6	1.0	7.5	1.4	
L	181	21	-1.3	4	2.0	0.3 u	2.1	1.9	
NL	7 860	1 091	0.2	349	4.4	0.9	5.0	0.5	
А	3 683	758	-1.3	249	6.8	2.1	6.7	0.3	
Р	4 898	1 072	-3.3	179	3.7	0.5	3.6	2.9	
FIN	2 367	481	3.1	171	7.2	2.0	6.7	4.9	
S	4 125	743	-0.4	326	7.9	1.5	7.6	1.2	
UK	27 711	4 732	-0.7	2 039	7.4	1.6	7.6	0.6	

Exception to the reference year 1995 — P: 1998. Therefore, annual average growth rates for Portugal refer to the 1998-2000 period. Values in % refer to percentage of total employment.

(2) unreliable

Source: Eurostat, S&T statistics - CLFS data.

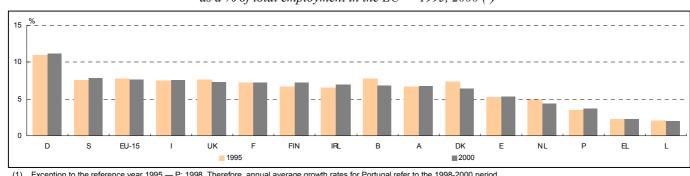


Figure 2: Employment in high tech and medium-high tech manufacturing as a % of total employment in the EU - 1995, 2000 (⁴)

Exception to the reference year 1995 - P: 1998. Therefore, annual average growth rates for Portugal refer to the 1998-2000 period.

Source: Eurostat, S&T statistics - CLFS data



With 32.3 % of the EU's total employment in 2000, employment in knowledge-intensive services (KIS) is in an upward trend

In 2000, over 51 million people were employed in knowledge-intensive services (KIS) in the EU, which amounted to 32.3 % of total employment (For details on the sectors considered as knowledge intensive, refer to the methodological notes). 3.4 % of total employment corresponded to high tech services, and 28.9 % to other KIS (Table 2).

The proportion of people employed in KIS in the EU is becoming increasingly important. This is explained by a stronger growth of employment in these sectors. For the 1995-2000 period, employment in KIS in the EU grew at an annual average growth rate of 2.9 %, which more than doubled the growth of employment overall (1.3 %).

At the Member State level, Germany, the UK and France accounted for 58.8 % of total employment in KIS in the EU. However, the country with the highest

proportion of people employed in KIS in 2000 was Sweden with 45.7 % of the total employed in these sectors, followed by Denmark with 42.1 % (Figure 3). The UK, the Netherlands, Finland, Belgium, Luxembourg and France also recorded rates above the EU average in 2000. At the other extreme, the lowest ratios of employment in KIS were registered in Portugal (18.9 %) and Greece (22.2 %).

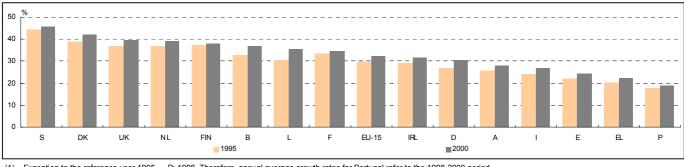
In line with the overall trend, all countries show an increasing proportion of employment in KIS. For the 1995-2000 period and in absolute terms, the biggest increases were recorded for countries with a below EU average proportion of employment in KIS, i.e. Ireland and Spain, which registered annual average growth rates of 7.5% and 6.0% respectively. These rates were well above the growth of their respective total employment (5.7% and 3.7%).

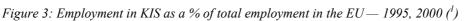
	Total employment	Total service	s	Knowledge intensive services (KIS)					
			1995-2000		2000	1	1995	1995-2000	
		Ar	nnual average growth rates		of wh	ich high tech		Annual average growth rates	
	Thousands	Thousands	%	Thousands	%(2)	% (2)	%(2)	%	
EU-15	158 368	105 300	2.0	51 168	32.3	3.4	29.9	2.9	
В	4 120	2 978	2.6	1 516	36.8	3.6	32.9	4.0	
DK	2 716	1 922	1.6	1 144	42.1	5.0	39.0	2.5	
D	36 325	23 187	1.3	11 031	30.4	3.0	26.9	2.8	
EL.	3 946	2 387	2.1	875	22.2	1.6	20.1	2.6	
E	14 450	9 011	4.4	3 541	24.5	2.2	22.0	6.0	
F	23 388	16 256	1.6	8 098	34.6	3.9	33.4	1.9	
IRL	1 668	1 050	6.7	529	31.7	4.0	29.2	7.5	
1	20 930	13 182	1.8	5 581	26.7	2.9	24.0	3.1	
L	181	139	4.0	64	35.5	2.7	30.5	5.4	
NL	7 860	5 516	2.9	3 074	39.1	4.1	36.7	4.3	
А	3 683	2 354	1.1	1 036	28.1	2.8	25.6	1.9	
Р	4 898	2 576	3.5	925	18.9	1.2	17.8	4.5	
FIN	2 367	1 555	3.6	898	37.9	4.4	37.3	3.6	
S	4 125	2 998	0.8	1 886	45.7	5.1	44.2	1.0	
UK	27 711	20 190	2.1	10 970	39.6	4.3	36.8	2.8	

Table 2: Employment in knowledge-intensive services (KIS) by country — 1995, 2000 $\binom{1}{2}$

Exception to the reference year 1995 — P: 1998. Therefore, annual average growth rates for Portugal refer to the 1998-2000 period.
Values in % refer to percentage of total employment.

Source: Eurostat, S&T statistics - CLFS data





(1) Exception to the reference year 1995 — P: 1998. Therefore, annual average growth rates for Portugal refer to the 1998-2000 period.

Source: Eurostat, S&T statistics - CLFS data.



Stuttgart (D) is the European region most specialised in employment in high tech and medium-high tech manufacturing

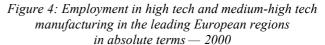
This section looks at the composition and evolution of employment in high tech and knowledge intensive sectors in the leading European regions defined at the NUTS 2 level. Table 3 shows the leading fifteen European regions in terms of employment in high tech and medium-high tech manufacturing as a percentage of total employment. The leading group was defined taking into account only those regions for which the employment rate in high tech and medium-high tech manufacturing was at least 20 % higher than the EU average, and in which the relevant threshold of employed persons (in absolute terms) was reached.

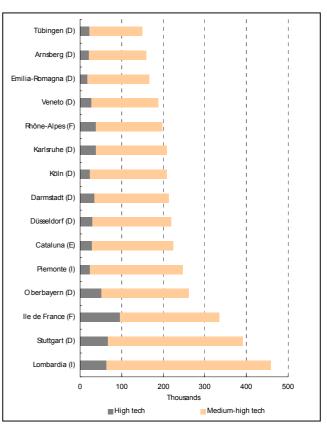
On average, 7.6 % of total employment at the EU level in 2000 corresponded to research intensive industries. However, disparities are large across the European regions, ratios ranging from around 5 % to 21.1 % in Stuttgart (D). Following Stuttgart in 2000 were Braunschweig (18.1 %) and Tübingen (17.8 %), both in Germany. Employment in high tech manufacturing in the top 3 regions accounted for 57.2 %, 63.1 % and 52.6 % of their respective total manufacturing employment.

It can be seen that employment in high tech and medium-high tech manufacturing is largely skewed towards German regions, which represented 10 out of the 15 leading regions. Although on average the proportion of employment in high tech and mediumhigh tech manufacturing is on a slight downward trend, the ratios for most leading regions in Europe have risen since 1995.

Figure 4 shows the leading European regions in employment in high tech and medium-high tech in terms of volume.

In 2000, the regions with the highest number of people employed in research intensive industries were Lombardia (I), with 458 thousand people employed in these sectors, Germany's Stuttgart (391 thousand) and Île de France (334 thousand).





Source: Eurostat, S&T statistics - CLFS data.

				20	00		1995
Ranking	g Country	Region	Thousands	% of total employment employment		% of total manufacturing	% of total employment
	EU-15		12 107	7.6	1.4	38.4	7.
1	D	Stuttgart	391	21.1	3.6	57.2	20.
2	D	Braunschweig	127	18.1	2.5	63.1	16.
3	D	Tübingen	150	17.8	2.6	52.6	16.
4	D	Karlsruhe	208	17.2	3.1	55.3	17
5	D	Mittelfranken	121	15.2	2.4	47.5	15
6	D	Unterfranken	91	15.0	1.6	49.7	15
7	D	Freiburg	142	14.7	4.2	47.9	13
8	D	Schwaben	120	14.5	1.5	48.4	13
9	I	Remonte	246	14.0	1.4	44.0	15
10	D	Oberbayern	262	12.9	2.5	55.3	12
11	F	Alsace	99	12.9	2.0	46.7	12
12	D	Darmstadt	213	12.3	2.0	56.8	13
13	В	Antwerpen	81	12.0	0.3	49.8	12
14	1	Lombardia	458	11.9	1.7	37.8	11
15	UK	West Midlands	131	11.8	1.2	46.1	12

Table 3: Leading European regions $(^{l})$ in employment in high tech and medium-high tech manufacturingas a % of total employment — 1995, 2000 $(^{2})$

(1) With a share of at least 9.12 % of total employment (equivalent to 120 % of the EU average) and at least 80 000 people working in high tech industries.

(2) Exceptions to the reference year 1995: UK: 1996

Source: Eurostat, S&T statistics - CLFS data.



Of the top 15 regions in absolute terms, the region with the highest ratio of people employed in high tech and medium-high tech manufacturing sectors in 2000 was Stuttgart, the leading European region in relative terms.

Looking at the evolution of employment in these sectors, Table 4 shows that the region where employment in high tech and medium-high tech manufacturing grew fastest in the 1995-2000 period was Koblenz (D) with an annual average growth rate of 32.2 %. At the other extreme, the largest decrease was experienced by the German region of Berlin, which decreased at an annual rate of 5.2 % during the 1995-2000 period.

Table 4: Regions with highest and lowest growth in employment in high tech
and medium-high tech manufacturing — 1995-2000 (l)

	Regions with high	est growth			Regions with low	est growth	
Country	Region	Employment in high tech (2)	Annual average growth rate	Country	Region	Employment in high tech (2)	Annual averag growth rat
		2000	1995-2000 (1)			2000	1995-2000 (1
		Thousands	%			Thousands	c
D	Koblenz	227	32.2	D	Berlin	91	-5.
IRL	Southern and Eastern	88	15.0	D	Hannover	85	-4.
F	Lorraine	83	7.2	UK	Greater Manchester	87	-2.
F	Bretagne	87	5.1	UK	Hampshire and Isle of Wight	88	-1.
D	Thüringen	88	4.9	1	Piemonte	246	-1.
UK	Bedfordshire, Hertfordshire	81	4.7	UK	West Midlands	131	-0.
F	Nord - Pas-de-Calais	93	4.3	F	Haute-Normandie	81	-0.
E	Comunidad de Madrid	136	3.9	D	Darmstadt	213	-0.
D	Detmold	85	3.6	D	Unterfranken	91	-0.
F	Alsace	99	3.2	F	Rhône-Alpes	198	0.
D	Tübingen	150	3.0	D	Karlsruhe	208	0.
UK	Gloucestershire, Wiltshire and North Somerset	100	2.9	D	Köln	209	0.
D	Arnsberg	160	2.6	D	Schleswig-Holstein	100	0.
E	Cataluna	224	2.5	D	Weser-Ems	93	0.
1	Lombardia	458	2.5	s	Västsverige	86	0.

With a share of at least 9.12 % of total employment (equivalent to 120 % of the EU average) and at least 80 000 people working in high tech industries. Exceptions to the reference period 1995-2000 – P: 1998-2000, UK: 1996-2000.
Refers to employment in high tech and medium-high tech manufacturing.

Source: Eurostat, S&T statistics - CLES data

Inner London was the European region with the highest proportion of people employed in KIS in 2000 (57.7 %)

The regional dimension of employment in knowledgeintensive sectors (KIS) is considered in Table 5. As for employment in high tech and medium-high tech manufacturing, the leading regions in KIS were defined taking into account only regions for which the employment rate was at least 20 % higher than the EU average, and in which the relevant threshold of employed people (in absolute terms) was reached.

Table 5: Leading European regions $\binom{1}{1}$ in employment in KIS as a % of total employment — 1995, 2000 $\binom{2}{1}$

				2	000		1995
Ranking	Country	Region	Thousands	% of total employment	of which high tech as % of total employment	% of total services	% of total employment
	EU-15		51 168	32.3	3.4	48.6	29.9
1	UK	Inner London	707	57.7	4.9	66.3	54.4
2	SE	Stockholm	498	53.2	8.4	62.7	49.9
3	UK	Outer London	1 068	49.7	6.2	59.2	47.7
4	NL	Noord-Holland	571	45.3	5.5	59.4	41.0
5	UK	Berkshire, Bucks and Oxfordshire	525	45.2	9.5	59.8	41.9
6	F	lle de France	2 245	44.7	6.5	55.7	43.0
7	UK	Surrey, East and West Sussex	567	44.5	5.3	56.8	45.4
8	FI	Uusimaa (Suuralue)	316	43.6	7.1	57.0	43.1
9	SE	Västsverige	352	43.0	4.7	62.4	42.9
10	UK	Bedfordshire, Hertfordshire	357	42.9	7.1	58.1	39.6
11	D	Berlin	621	42.4	4.3	54.6	37.4
12	UK	Essex	323	42.1	4.1	56.9	40.8
13	NL	Zuid-Holland	698	41.1	4.6	55.7	39.1
14	D	Hamburg	323	40.5	3.6	52.2	36.0
15	UK	West Yorkshire	393	39.4	3.6	55.4	35.2

With a share of at least 38.76% of total employment (equivalent to 120 % of EU average) and at least 300 000 people working in KIS Exceptions to the reference year 1995: All UK regions: 1996.

(2)



Source: Eurostat, S&T statistics - CLFS data

In 2000, employment in KIS accounted for 32.3 % of the total European employment. At the regional level, this ratio ranged from 12.8 % in Sterea Ellada (EL) to 57.7 % in Inner London. The next highest regions in 2000 were the Swedish region of Stockholm (53.2 %) and Outer London (49.7 %). Employment in KIS accounted for 66.3 % of total employment in services in Inner London, 62.7 % in Stockholm and 59.2 % in Outer London. It can be seen from Table 5 that, in the case of employment in KIS, the leading group is rather dominated by UK regions, which accounted for 7 out of the top fifteen. The leading group in employment in KIS is however more evenly distributed across Member States than in manufacturing, as Swedish, Dutch, French, Finnish and German regions are also included in the top fifteen.

Figure 5 shows the leading European regions in employment in KIS in volume, distinguishing between employment in high tech services and employment in other knowledge-intensive services.

The European region with the largest number of people employed in KIS in 2000 was Île de France (2245 thousand), followed by Outer London (1068 thousand) and Lombardia (1040 thousand). Among the top fifteen regions in absolute terms, Île de France was also the region with the highest proportion of people working in high tech services (6.5 % of total employment), followed by Outer London (6.2 %) and Comunidad de Madrid in Spain (5.7 %).

Following the general trend in Europe, employment in knowledge-intensive services grew faster than employment overall in the leading European regions. Accordingly, employment in KIS has increased for all the leading European regions since 1995, with the exception of South Western Scotland (UK), where it slightly decreased. For the 1995-2000 period, the largest increase of employment in KIS was registered by the German region of Koblenz, which grew at 26.2 % per annum (Table 6).

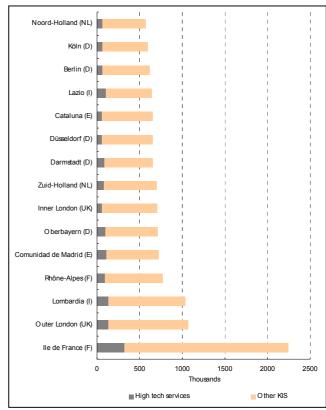


Figure 5: Employment in KIS in the leading European regions in absolute terms – 2000

Source: Eurostat, S&T statistics - CLFS data.

	Regions with high	est growth		Regions with lowest growth				
Country	Region	Employment in KIS	Annual average growth rate	Country	Region	Employment in KIS	Annual average growth rate	
		2000	1995-2000 (1)			2000	1995-2000 (1)	
		Thousands	%			Thousands	c	
D	Koblenz	501	26.2	UK	South Western Scotland	354	-0.3	
IRL	Southern and Eastern	427	25.3	S	Västsverige	352	0.	
E	Comunidad Valenciana	335	7.5	D	Berlin	621	0.	
E	Comunidad de Madrid	724	7.0	F	Aquitaine	369	1.	
E	Cataluna	653	6.7	F	Rhône-Alpes	772	1.	
UK	Hampshire and Isle of Wight	346	5.9	F	Provence-Alpes-Côte d'Azur	565	1.	
UK	East Anglia	421	5.2	UK	Eastern Scotland	351	1.	
D	Brandenburg	323	4.8	UK	Surrey, East and West Sussex	567	1.	
E	Andalucia	500	4.8	UK	Essex	323	1.	
NL	Noord-Holland	571	4.6	1	Sicilia	372	1.	
S	Stockholm	498	4.6	D	Münster	301	1.	
D	Köln	597	4.6	D	Stuttgart	511	2.	
UK	Berkshire, Bucks and Oxfordshire	525	4.5	F	lle de France	2 245	2.	
1	Piemonte	446	4.5	1	Puglia	304	2.	
NL	Zuid-Holland	698	4.5	D	Schleswig-Holstein	399	2.	

Table 6: Regions with highest and lowest growth in employment in KIS -1995-2000 (⁴):

(1) With a share of at least 38.76% of total employment (equivalent to 120 % of EU average) and at least 300 000 people working in KIS. Exceptions to the reference period 1995-2000 – P: 1998-2000, UK: 1996-2000.

Source: Eurostat, S&T statistics - CLFS data.



ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The importance of high and medium-high technology manufacturing sectors, not to mention knowledge-intensive service sectors, has increased considerably in the last few years and this has had a significant impact on the structure and organisation of employment in Europe.

In order to permit analysis of knowledge and technology intensive sectors, Eurostat's EHT database includes data on employment in high technology and medium high technology manufacturing sectors, knowledge-intensive service sectors, high technology service sectors, other sub-sectors and reference sectors. Employment in high tech data and derived indicators are extracted and built up using data from the Community Labour Force Survey (CLFS).

The database covers a time series from 1994 onwards, but differences exist and certain years are missing. Existence of data further depends on their reliability. Data are currently available at the national and regional levels (NUTS '98 levels 1 and 2) for the 15 Member States of the European Union.

Classification of high tech and knowledge intensive sectors

The classification of high and medium-high technology manufacturing sectors is based on the OECD's classification (itself based on the ratio of R&D expenditure to GDP). Since the CLFS only allows reporting of NACE at the 2 digit level, the following NACE Rev 1 sectors are included:

High tech Manufacturing

- 30 Manufacturing of office machinery and computers
- 32 Manufacturing of radio, television and communication equipment and apparatus
- 33 Manufacturing of medical precision and optical instruments, watches and clocks

Medium-high tech manufacturing

- 24 Manufacture of chemicals and chemical products
- 29 Manufacture of machinery and equipment n.e.c.
- 31 Manufacture of electrical machinery and apparatus n.e.c.
- 34 Manufacture of motor vehicles, trailers and semi-trailers
- 35 Manufacturing of other transport equipment

Knowledge-intensive sectors (KIS)

Following a similar logic as for manufacturing, Eurostat defines the following sectors as knowledge-intensive services (KIS):

- 61 Water transport
- 62 Air transport
- 64 Post and telecommunications
- 65 Financial intermediation, except insurance and pension funding
- 66 Insurance and pension funding, except compulsory social security
- 67 Activities auxiliary to financial intermediation
- 70 Real estate activities
- 71 Renting of machinery and equipment without operator and of personal and household goods
- 72 Computer and related activities
- 73 Research and development
- 74 Other business activities
- 80 Education
- 85 Health and social work
- 92 Recreational, cultural and sporting activities

Of these sectors, 64, 72 and 73 are considered high tech services.

NACE

The data here presented are based on the Statistical classification of economic activities in the European Community, NACE Rev.1, 1996.

NUTS

Regional data are presented according to the *Nomenclature of Territorial Units for Statistics, NUTS* 1999, developed by Eurostat. Data in this SIF are presented at the NUTS 2 level, subject to being statistically significant.

Statistical abbreviations and symbols

u Unreliable.

For further methodological notes, please refer to Eurostat's reference database NewCronos Theme 9; Domain Employment in high technology sectors (EHT).



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