



Rialtas na hÉireann
Government of Ireland

Annual Business Survey of Economic Impact (ABSEI) 2018

Prepared by the Department of Business, Enterprise and Innovation

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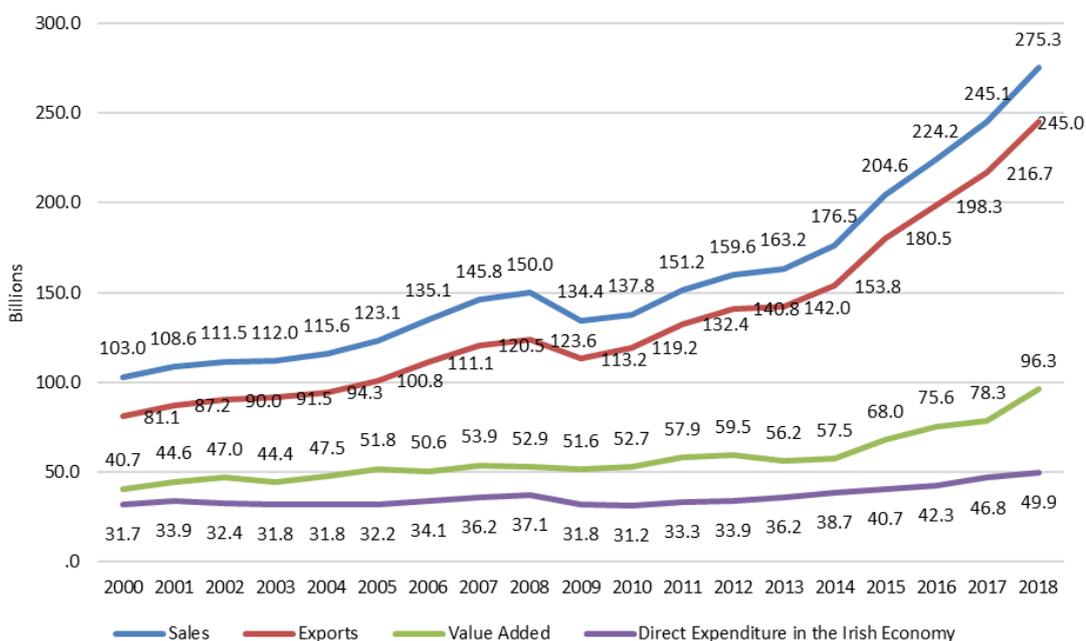
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Executive Summary

The Annual Business Survey of Economic Impact is a survey of approximately 4,200 client companies of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta employing ten or more employees in Ireland¹ and comprises the Manufacturing and Information, Communication and Other Internationally Traded Services sectors (see Appendix 2). All data is in current prices.

E.1 Key Business Indicators for all Agency Client Companies (current prices), 2000-2018



This graph gives the sales, exports, value added and direct expenditure in the Irish economy figures for all Agency client companies from the first survey in 2000 to the latest results for 2018.

Agency client companies reported a rise in sales and exports in 2018 over the previous year. This continues a substantial upward trend in results following the downturn in the economy in 2008.

- Total sales amounted to €275.3 billion in 2018 which represents an increase of 12.3% in current prices on the previous year’s figure of €245.1 billion.
- Total exports in 2018 amounted to €245.0 billion, an increase of 13.1% on the previous year of €216.7 billion.

¹ The population of the ABSEI survey also includes a small number of High-Potential Start-Up (HPSU) companies with employment of less than 10 where there is an expectation that their employment will exceed 10 in the following survey.

- Value added (sales less materials and services costs) has also increased over this time-series and in 2018 amounted to €96.3 billion, up 23.0% on the previous year with two-thirds of this increase attributable to the foreign owned chemicals sector and IT services sector.
- Direct Expenditure in the Irish Economy (Payroll, Irish Materials, Irish Services) has increased over 2017 by 6.6% to €49.9 billion in 2018.

E.2 Summary Table of Key Business Indicators (current prices), 2018

	2018 (€bn)			Share of Total 2018		
	Foreign-owned	Irish-Owned	All	Foreign-owned	Irish-Owned	All
Sales	230.7	44.6	275.3	84%	16%	100%
Exports	222.0	23.0	245.0	91%	9%	100%
Value Added	80.0	16.4	96.3	83%	17%	100%
Direct Expenditure	23.5	26.4	49.9	47%	53%	100%

Note: Rounding may affect totals

This table shows sales, exports, value added and direct expenditure for 2018 by ownership.

- Total sales for agency-assisted companies in 2018 amounted to €275.3 billion.
 - Foreign-owned companies account for €230.7 billion, an increase of 13.6% over the previous year. This represents 84% of total sales by Agency clients in 2018.
 - Sales for Irish-owned firms increased by 6.0% between 2017 and 2018, amounting to €44.6 billion or 16% of total sales.
- Total exports for agency clients amounted to €245.0 billion in 2018, a 13.1% increase over 2017 exports, with €222.0 billion exports by Foreign-owned companies and €23.0 billion exports by Irish-owned companies in 2018.
- Value added was €96.3 billion in 2018 with 83% of this value being generated in foreign owned firms.
- Irish owned client companies have €26.4 billion of direct expenditure in the Irish economy compared with €23.5 billion for foreign owned companies.

E.3 Export Intensity of Irish and Foreign-owned Companies, 2000-2018

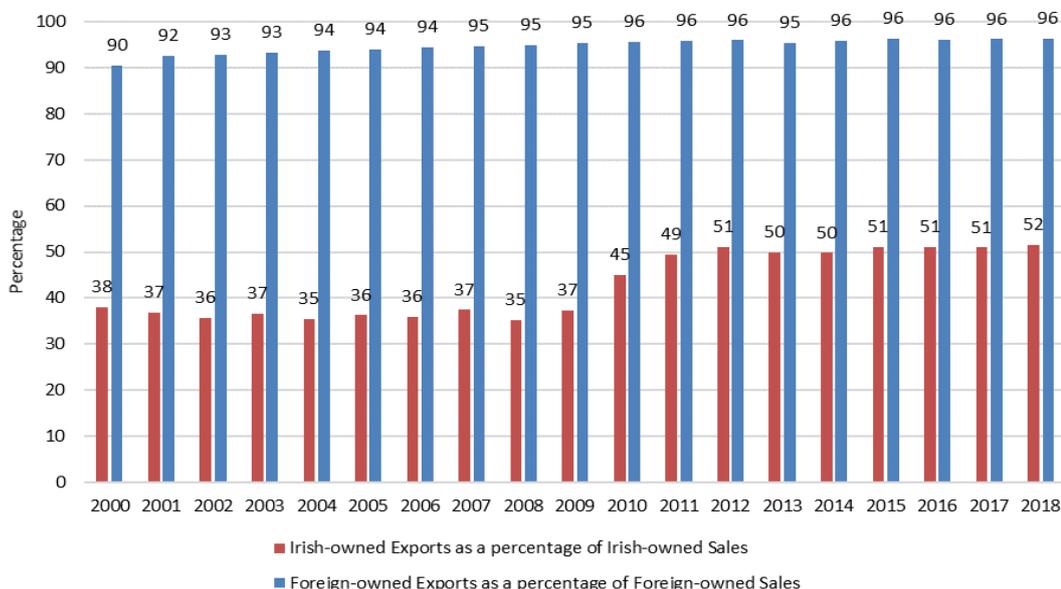
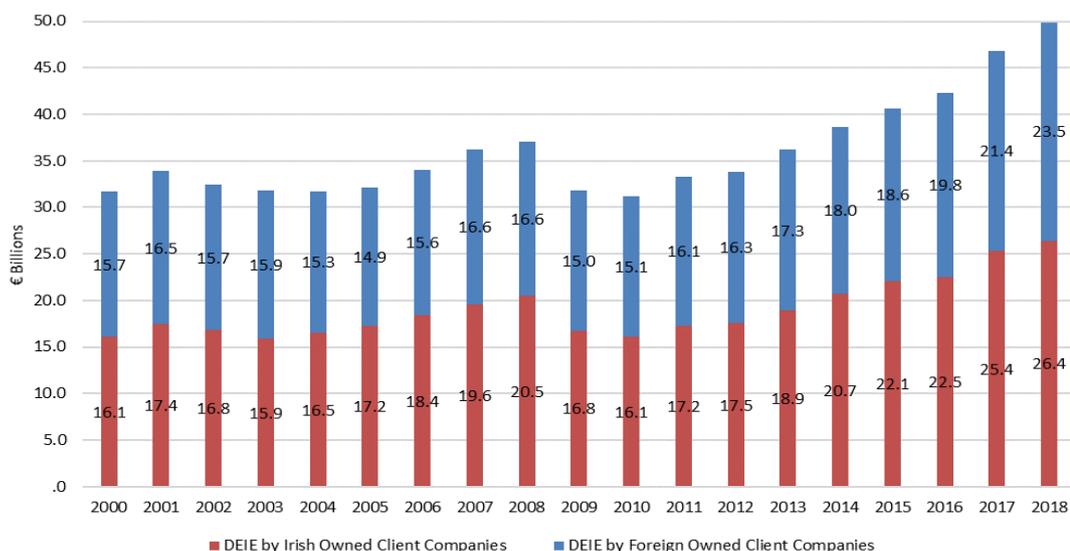


Figure E.3 above illustrates the export intensity (exports as a percentage of total sales) of Irish-owned and Foreign-owned firms over the period 2000 to 2018.

- Irish-owned firms have increased their export intensity from 38% in 2000 to a steady 50-52% intensity since 2012.
- The vast majority of products and services produced by foreign-owned firms are destined for export, with an export intensity of 96% in 2018, at this constant level since 2010.

E.4 Direct Expenditure in the Irish Economy (DEIE) by Ownership, 2000-2018



In 2018, Direct Expenditure in the Irish Economy (DEIE) by agency-assisted firms amounted to €49.9 billion and is the highest level of direct expenditure in the eighteen years of this time-series.

Irish-owned client companies spent approximately €26.4 billion in the Irish economy in terms of payroll and purchases of Irish materials and Irish services. Foreign owned clients spent €23.5 billion. Direct Expenditure has been increasing each year since 2010.

E.5 All firms, year-on-year percentage change, Payroll, Irish Materials and Irish Services, 2000-2018



In 2018, there was an increase in payroll and purchases of Irish materials and services over the 2017 figures. There was an increase in the purchases of Irish materials of 2.2% and Irish services of 8.6% and of payroll payments of 9.0%.

E.6 Direct Expenditure as Percentage of GNP² in Irish/foreign-owned companies, 2000, 2009 and 2018

	Irish			Foreign		
	2000	2009	2018	2000	2009	2018
All Sectors	17.3%	11.9%	10.4%	16.8%	10.7%	9.3%
Manufacturing & Other Industry	15.3%	10.0%	8.4%	12.0%	7.1%	4.9%
Infor., Comm. & Other Services	2.0%	2.0%	2.1%	4.8%	3.6%	4.4%

- In 2018, the Direct Expenditure (payroll and purchases of Irish materials & services) of Irish-owned firms in the Irish economy amounted to 10.4% of Ireland’s Gross National Product (GNP). In 2000, this

² Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2009 = €140.6bn / 2018 = €253bn. Source: CSO, StatBank: T05 Expenditure on Gross National Income at Current Market Prices: 88. Gross national product at current market prices.

figure was 17.3% and 11.9% in 2009, as growth in direct expenditure did not keep pace with growth in GNP.

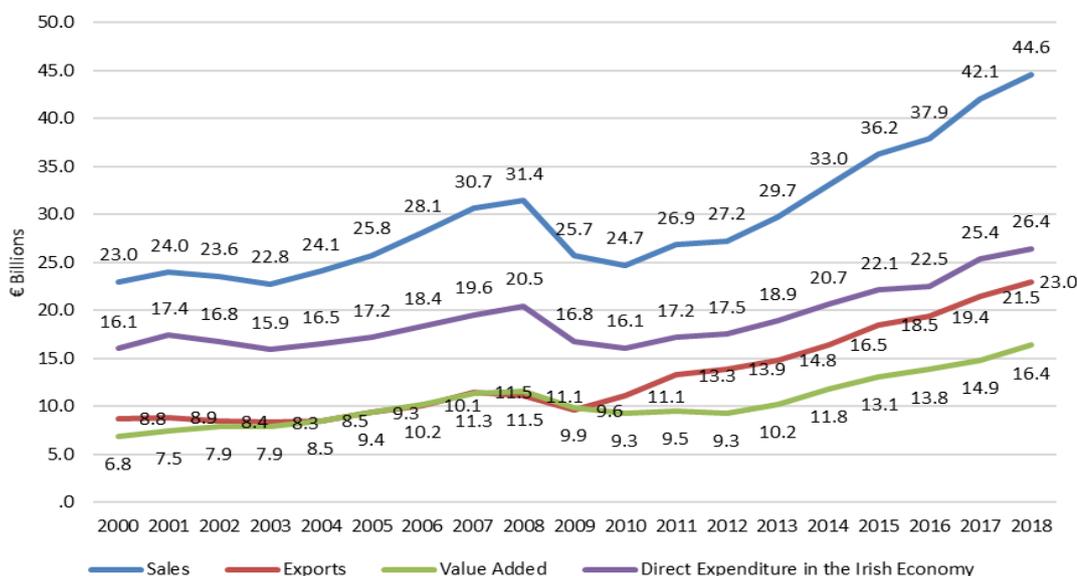
- Direct Expenditure of the Irish-owned Manufacturing sectors as a percentage of GNP reduced from 15.3% to 10% between 2000 and 2009 and decreased further in 2018 to 8.4%. The Services sectors have increased their share from 2.0% in 2000 to 2.1% in 2018.
- Direct Expenditure by foreign-owned firms as a percentage of GNP stands at 9.3% in 2018 down from 16.8% in 2000.
 - Direct Expenditure as a percentage of GNP in the foreign-owned Information, Communication & Internationally-Traded Services sectors decreased from 4.8% in 2000 to 4.4% in 2018. The manufacturing sectors have also decreased their share from 12.0% in 2000 to 4.9% in 2018.

E.7 Value Added as percentage of GNP in Irish/foreign-owned companies, 2000, 2009 and 2018

	Irish			Foreign		
	2000	2009	2018	2000	2009	2018
All	7.4%	7.0%	6.5%	36.4%	29.7%	31.6%
Manufacturing & Other Industry	5.2%	4.2%	3.9%	25.9%	19.9%	18.2%
Infor., Comm. & Other Services	2.1%	2.8%	2.6%	10.5%	9.8%	13.4%

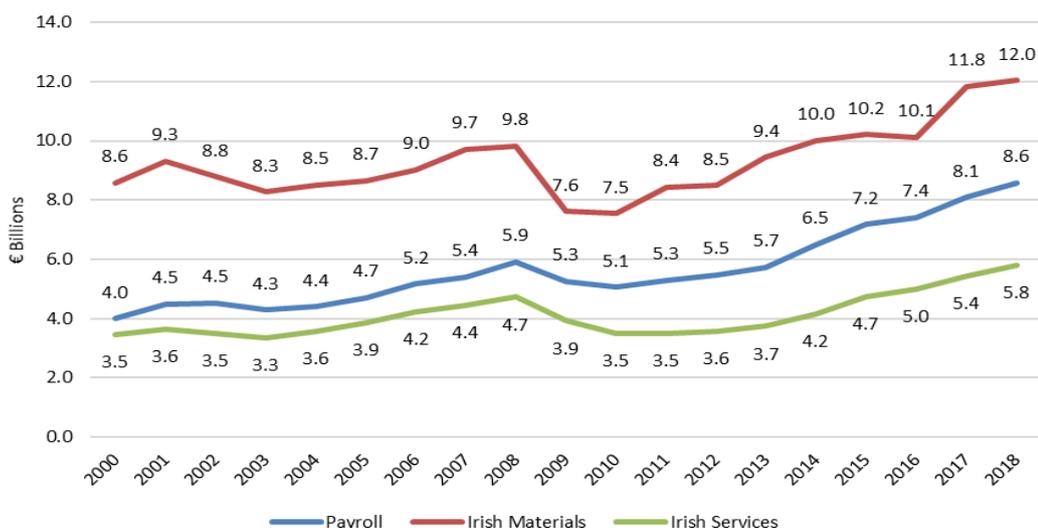
- Value added (sales less the cost of materials and services) in Irish owned companies has dropped as a percentage of GNP in 2018 to 6.5% from 7.4% in 2000.
 - While the manufacturing sectors have seen value added decrease between 2000 and 2018 from 5.2% to 3.9%, the services sectors have increased their percentage share of GNP from 2.1% in 2000 to 2.6% in 2018.
- For foreign-owned companies, value added as a percentage of GNP decreased from 36.4% in 2000 to 29.7% in 2009 and increased to 31.6% in 2018.
 - The Services sectors have increased value added from their 2000 level of 10.5% of GNP to 13.4% of GNP in 2018.
 - The Manufacturing sectors have decreased value added as a percentage of GNP from 25.9% in 2000 to 18.2% in 2018.

E.8 Key Business Indicators for Irish-Owned Companies, 2000-2018 (current prices)



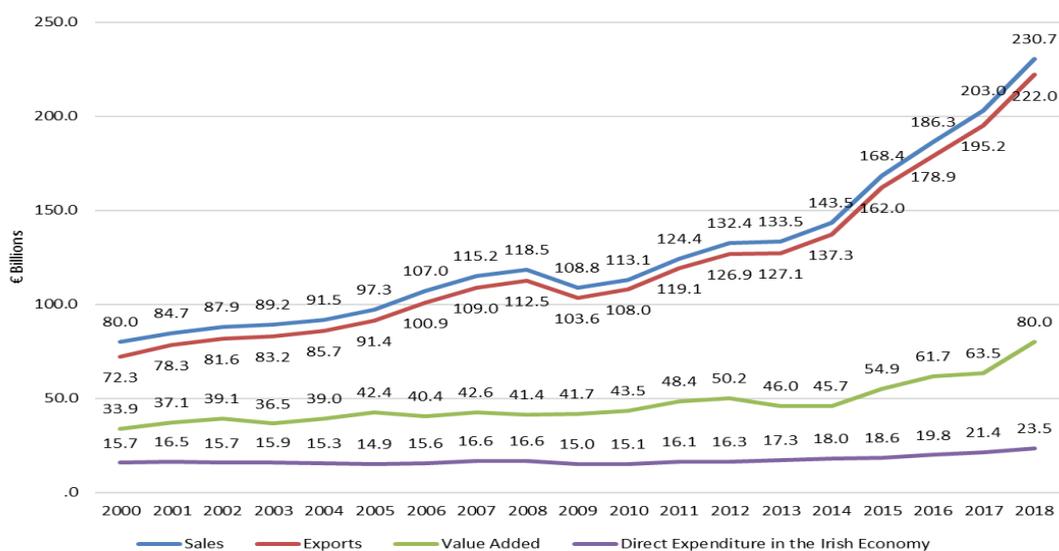
- Sales by Irish owned firms in 2018 showed an increase of 6.0% on the previous year. Total sales stood at €44.6 billion in 2018.
- Exports were also significantly up for Irish firms in 2018 over 2017 with growth of 7.1% and amounted to €23.0 billion in 2018.
- Value-added and direct expenditure have also continued their upward trend with direct expenditure reaching €26.4 billion (up 4.2%) and value added €16.4 billion (up 10.1%) in 2018.

E.9 Direct Expenditure in the Irish Economy for Irish-owned client's companies, 2000-2018



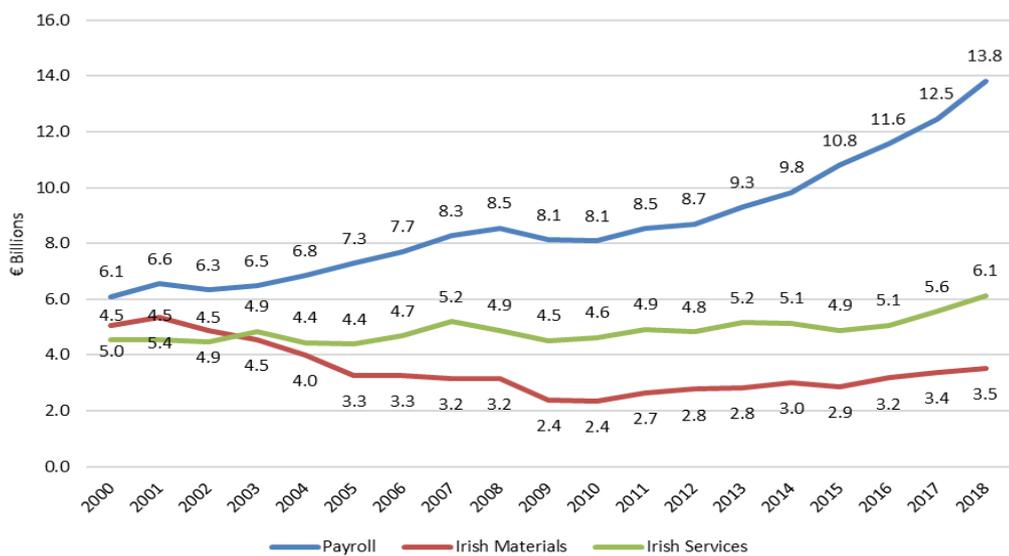
- Irish-owned firms spent €26.4 billion in 2018 in the Irish economy with the largest proportion of this expenditure being on Irish materials. The breakdown of expenditure in 2018 was €8.6 billion on payroll, €12.0 billion on Irish raw materials and €5.8 billion on Irish services.

E.10 Key Business Indicators for Foreign-Owned Companies, 2000-2018 (current prices)



- Sales by foreign-owned companies have increased by 13.6% and exports by 13.7% in 2018 over 2017 to €230.7 billion and €222.0 billion respectively. On a per annum basis between 2000 and 2018, sales increased by 6.1% and exports by 6.4%.
- Value added increased by 26.0% between 2017 and 2018 to €80.0 billion.
- Direct expenditure reached €23.5 billion in 2018, a 9.6% increase over the previous year.

E.11 Direct Expenditure in the Irish Economy by Foreign-owned companies, 2000-2018



- Foreign firms spend less on Irish materials and more on payroll and services than Irish firms. In 2018, direct expenditure by foreign firms amounted to €23.5 billion, comprising €13.8 billion on payroll, €3.5 billion on materials and €6.1 billion on services purchased in Ireland.

Chapter 1: Introduction

1.1 Background

This report presents the findings of the Annual Business Survey of Economic Impact for 2018.

This is a survey of the client companies of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta. Data is presented by company ownership i.e. Irish or foreign. All IDA Ireland clients are foreign owned while Enterprise Ireland and Údarás na Gaeltachta have both Irish and foreign owned client companies.

The report provides aggregated estimates for all Irish-owned and foreign-owned client firms across a range of variables and provides an overview of the evolution of manufacturing and services sectors for the past eighteen years (2000-2018 inclusive). All data is presented in current prices.

1.2 Methodology

- The population comprises all agency client firms in manufacturing and services sectors in Ireland with 10 or more employees. A schedule of the services industries that are eligible for assistance under the Industrial Development Acts is listed in Appendix 2. Also included in the population are a small number of High-Potential Start-Up (HPSU) companies where there is an expectation that their employment will exceed 10 in the following surveys.
- Approximately 4,200 client companies in total were surveyed. To allow for non-responses, aggregated results are developed by sector using a combined weighting and imputation system³.
- Fieldwork was carried out throughout 2018/2019.
- All figures in this report are in nominal values (current prices).
- Compound Annual Growth Rate (CAGR). Throughout this report the percentage change between 2000-2009 and 2000-2018 is calculated using the compound annual growth rate (CAGR). The CAGR is used to calculate a constant rate of change over the time period.
- Rounding - figures in this report are rounded to assist the reader. While the figures are easier to comprehend, some figure and percentages will not add-up to the total.

³ Weightings are used to account for non-respondents and are based on NACE sector, ownership, size and region. Imputations are made where a large company has not responded and are usually based on their responses to previous surveys.

Data Revisions

- Each year revisions are made to the historical time-series data based on the latest available validated information from client companies.
- These revisions result in changes to the time-series, impacting on previously published ABSEI results.

1.3 Detailed aggregated results, 2000-2018

Aggregated data from the Annual Business Survey is available for the period 2000-2018. These results are available in excel format on the Department of Business, Enterprise and Innovation (DBEI) website. To access these excel files please go to publications section on the DBEI web-site at:

The files contain the following indicators:

Sales & Exports	
1	Total Sales of Goods Produced and Services Provided
2	Total Employment
3	Total Sales per Person Employed
4	Total Exports
5	Total Exports as a percentage of Total Sales
Payroll	
6	Total Payroll
7	Total Payroll Costs per Person Employed
Materials Costs	
8	Total Cost of Materials
9	Total Cost of Materials Produced in Ireland
10	Irish-produced Materials as a Percentage of all Materials
Services Costs	
11	Total Cost of all Services
12	Total Cost of Services Sourced in Ireland
13	Irish-sourced Services as a Percentage of all Services
Total Value Added	
14	Total Value Added (Sales-(Total Materials Cost + Total Services Cost))
15	Total Value Added per person employed
16	Total Payroll as a percentage of Value Added
Training Costs	

17	Total Cost of all formal, structured training
18	Cost of all Structured, Formal Training as a percentage of payroll
Direct Expenditure	
19	Direct Expenditure in the Irish Economy (Payroll + Irish Materials + Irish Services)

Results are broken down by⁴:

- Ownership (All, Irish, foreign)
- NACE Rev2 sector (2 digit) – See Appendix 1 for more details.

All monetary amounts are provided in current prices.

1.4 Management and Use of Data

An inter-agency group, chaired by the Enterprise, Strategy, Competitiveness and Evaluation Division (ESCED) in the Department of Business, Enterprise and Innovation (DBEI), comprised of representatives from each of the participating agencies, manages the implementation of this survey. The group decides on issues of methodology, coverage and questionnaire content.

The survey is used extensively by DBEI for the purposes of evidence-based policy making and by the participating agencies for a number of purposes, some of which are listed below:

- Each of the participating agencies obtains aggregated information relating to its own client base, and this information is used to assess the achievement of internal goals and targets.
- The firm-level data compiled in the survey is used by each of the agencies, and by DBEI, to feed into many policy/sectoral studies and enterprise strategies, as well as assessments and evaluations of programmes.

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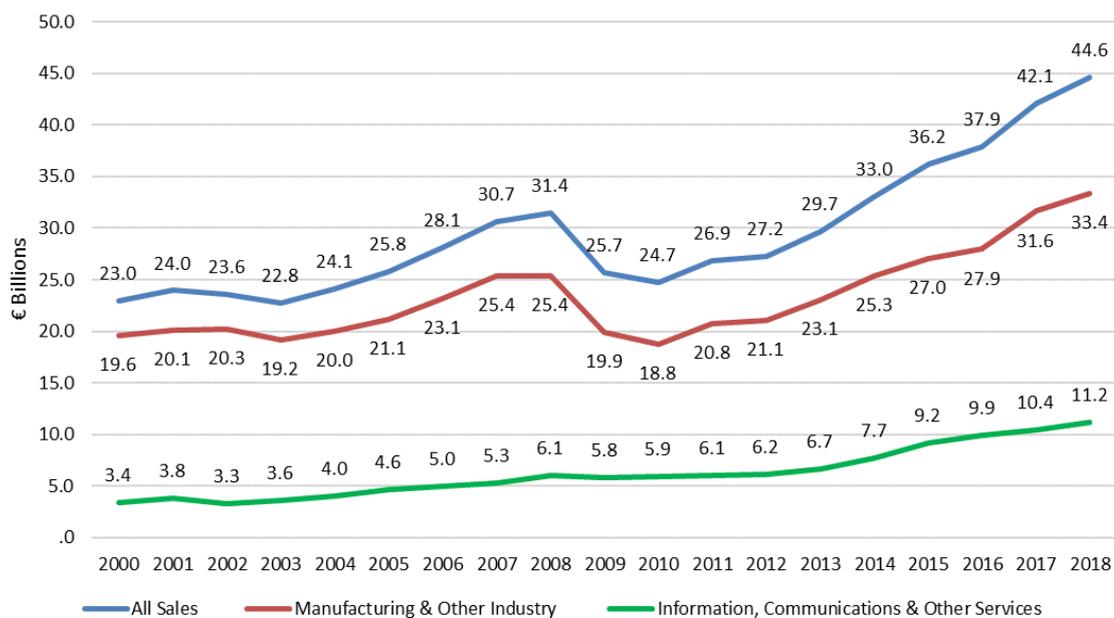
⁴ A regional split is also available in the CSV files published with the report.

Acknowledgement

The Department of Business, Enterprise and Innovation would like to thank the many respondents to this survey who have taken the time to gather information and return the data for this key area of Government policy. We would also like to thank Insight Statistical Consulting who carried out the field work for this survey.

Chapter 2: Key Business Indicators for Irish-owned Agency Client Companies

2.1 Sales - Irish-owned Client Companies, 2000-2018



This graph shows the total level of sales achieved by Irish-owned companies during the nineteen years of this survey and is broken down by major sector – manufacturing and services (see Appendix 2 for a list of the specific service sectors).

The dark blue column on this graph tracks the growth in the sales up to 2009 and the subsequent decline in sales reaching a low in 2010. In each of the subsequent years, Irish-owned companies have increased their sales:

- Total sales in 2018, stood at €44.6 billion for all manufacturing and services companies and is the highest level of sales recorded over the course of this survey. This represents an 6.0% increase over the 2017 figure of €42.1 billion at current prices.
- In the manufacturing & other Industry sector, sales reached the high points of €25.4 billion in 2007 and 2008 but then dropped to €18.8 billion in 2010. Sales in manufacturing companies have recovered in each of the past six years and in 2018 sales amounted to €33.4 billion at current prices, their highest ever level.
- Sales in the services sectors have been increasing steadily over the last eighteen years and amounted to €11.2 billion in 2018. These sales represent a per annum increase of 6.8% over the 2000 sales figure of €3.4 billion.

2.2 Sales and Sales Growth by sector - Irish-owned Client Companies

	2000	2009	2017	2018	Per Annum Change 2000-18	Per Annum Change 2009-18	Per Annum Change 2017-18
	€m	€m	€m	€m	%	%	%
Total All Sectors	23,004	25,668	42,076	44,590	3.7%	6.3%	6.0%
Manufacturing & Other Industry	19,589	19,889	31,638	33,413	3.0%	5.9%	5.6%
Food & Drink	9,580	9,392	15,510	15,875	2.8%	6.0%	2.4%
Traditional Manufacturing	6,388	5,142	8,816	9,233	2.1%	6.7%	4.7%
Modern Manufacturing	1,102	844	1,624	1,667	2.3%	7.8%	2.6%
Energy, Water, Waste, Construction	2,520	4,510	5,688	6,638	5.5%	4.4%	16.7%
Infor, Comm. & Other Services	3,414	5,780	10,437	11,177	6.8%	7.6%	7.1%
Information, Comm. & Computer	1,453	1,625	3,475	3,755	5.4%	9.8%	8.1%
Bus., Financial & Other Services	1,961	4,154	6,963	7,422	7.7%	6.7%	6.6%

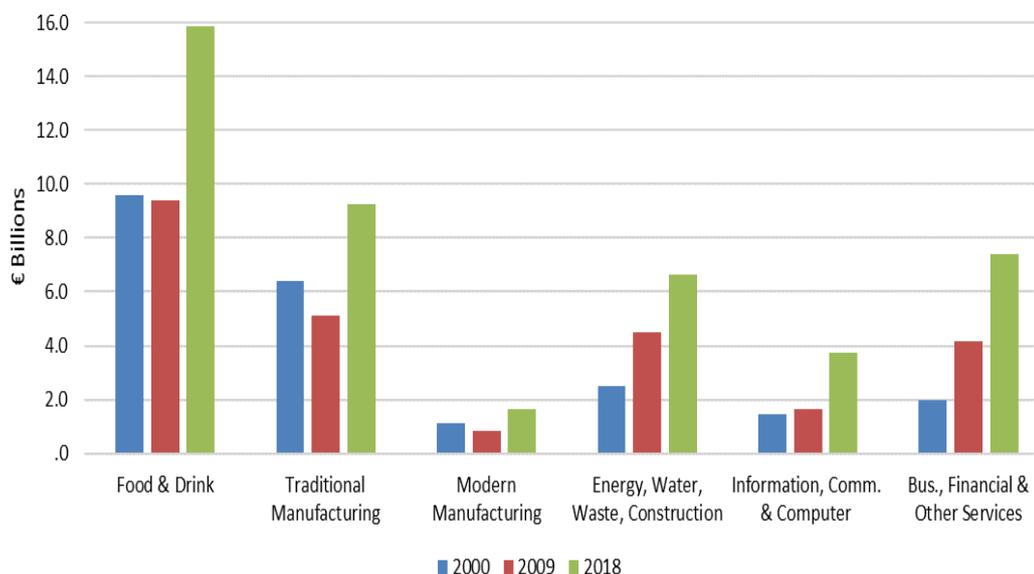
Total sales of Irish-owned manufacturing and service companies amounted to €44.6 billion in 2018 representing an 6.0% increase over the previous year's figures. There was an increase in sales of 5.6% and 7.1% between 2017 and 2018 in the Manufacturing and Services sectors.

The largest sector for Irish-owned clients is the Food & Drink sector with sales of €15.9 billion in 2018 – an increase of 2.4% over 2017 and of 2.8% per annum increase over the 2000 figure of €9.6 billion.

Traditional Manufacturing saw an increase in sales of 4.7% over 2017 with sales of €9.2 billion. There has been a per annum increase of 2.1% over the 2000 figure of €6.4 billion.

Information, Communications & Other Services grew 7.1% over 2017 to €11.2 billion and had a per annum increase of 6.8% from the 2000 figure. The Business & Financial & Other sector increased sales to €7.4 billion in 2018 from €2.0 billion in 2000, an annualised increase of 7.7%.

Sales by sector - Irish-owned Client Companies



2.3 Changing Composition of Sales and Employment in Irish-owned Client Companies, 2000 and 2018

	Sales		Employment	
	2000	2018	2000	2018
Manufacturing & Other Industry	85.2%	74.9%	81.3%	67.7%
Food & Drink	41.6%	35.6%	29.5%	25.4%
Traditional Manufacturing	27.8%	20.7%	42.4%	27.8%
Modern Manufacturing	4.8%	3.7%	4.9%	4.3%
Energy, Water, Waste, Construction	11.0%	14.9%	4.5%	10.2%
Information, Communications & Other Services	14.8%	25.1%	18.7%	32.3%
Information, Communications & Computer	6.3%	8.4%	9.4%	14.0%
Business, Financial & Other Services	8.5%	16.6%	9.3%	18.2%

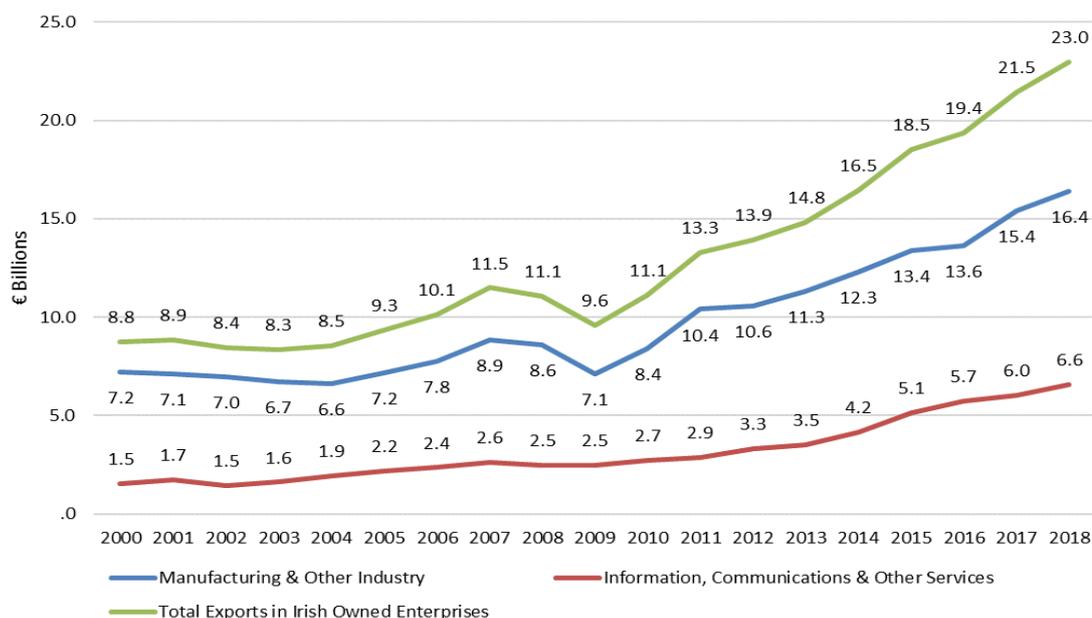
This table provides an overview of sales and employment across a number of broad industry groups to illustrate the changing composition of Irish-owned industry between 2000 and 2018.

- The majority of Irish-owned companies operate in the Manufacturing sector, though the share of total sales accounted for by manufacturing has dropped from 85.2% in 2000 to 74.9% in 2018. The Food & Drink sector dropped its share of sales over this period from 41.6% of total Irish-owned sales to 35.6%.

The Traditional Manufacturing sector accounted for 20.7% of total sales in 2018 down from 27.8% in 2000.

- The share of sales accounted for by Information, Communication and Other Services has increased from 14.8% in 2000 to 25.1% in 2018, highlighting the increasing importance of these sectors. Within this the Business, Financial and Other Services sector doubled its share of sales from 8.5% to 16.6% over the period 2000-2018.
- While the Food & Drink sector accounted for 35.6% of the sales in Irish-owned industry in 2018, it accounts for 25.4% of the employment. Traditional Manufacturing has witnessed its share of employment drop from 42.4% in 2000 to 27.8% in 2018 while the Energy, Water, Waste & Construction sectors have increased their employment from 4.5% to 10.2%.
- Overall, the Information, Communication and Other Services sector continues to see its share of Irish-owned employment rise significantly from 18.7% in 2000 to 32.3% in 2018.

2.4 Exports in Irish-owned Client Companies, 2000-2018



This graph shows the level of exports by agency-assisted Irish-owned companies during the eighteen years of this survey and shows the upward trend in the level of exports since 2009 and amounted to €23.0 billion in 2018.

Exports from the Irish-owned Manufacturing sectors in 2018 amounted to €16.4 billion, which represented 71.4% of all exports in that year. Service exports at €6.6 billion in same year represent 28.5% of total exports.

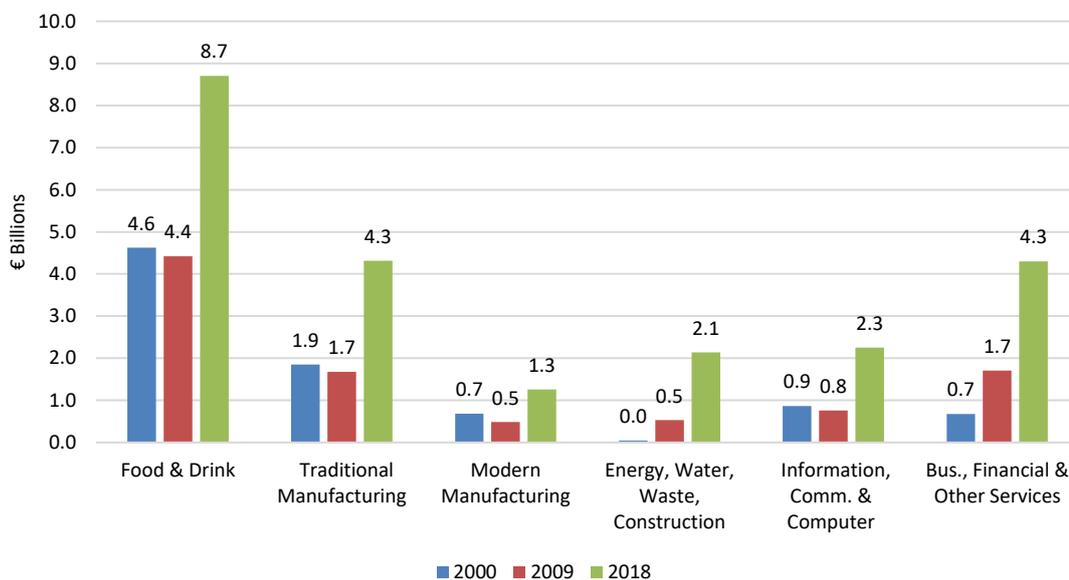
- Total exports in 2018 stood at €23.0 billion for all Manufacturing and Services companies and is the highest level of exports recorded over the course of this survey. This represents a 5.8% per annum change over the 2000 figure of €8.8 billion.
- In the Manufacturing sector, exports have increased steadily since a low in 2009 of €7.1 billion and amounted to €16.4 billion in 2018. This represents a 4.7% per annum increase on the 2000 figure of €7.2 billion and a 9.7% average per annum increase over the low point figure in 2009 of €7.1 billion. Exports in the Manufacturing sectors increased by 6.6% in 2018 over 2017.
- The value of exports in the Services sector amounted to €1.5 billion in 2000 and has consistently grown in the intervening years to €6.6 billion by 2018. This represents a per annum change of 8.4% between the 2000 and 2018 export figures. Services exports rose by 8.3% between 2017 and 2018.

2.5 Exports by Sector in Irish-owned Companies, 2000, 2009, 2017 and 2018

	2000	2009	2017	2018	Per Annum Change 2000-18	Per Annum Change 2009-18	Per Annum Change 2017-18
	€m	€m	€m	€m	%	%	%
Total - All Sectors	8,752	9,582	21,450	22,969	5.5%	10.2%	7.1%
Manufacturing & Other Industry	7,207	7,115	15,401	16,419	4.7%	9.7%	6.6%
Food & Drink	4,628	4,418	8,573	8,706	3.6%	7.8%	1.5%
Traditional Manufacturing	1,853	1,679	4,065	4,313	4.8%	11.1%	6.1%
Modern Manufacturing	680	484	1,191	1,263	3.5%	11.2%	6.0%
Energy, Water, Waste, Construction	46	534	1,572	2,137	23.8%	16.7%	36.0%
Infor., Comm. & Other Services	1,545	2,466	6,050	6,551	8.4%	11.5%	8.3%
Information, Comm. & Computer	866	763	2,044	2,251	5.5%	12.8%	10.1%
Bus., Financial & Other Services	680	1,704	4,005	4,300	10.8%	10.8%	7.4%

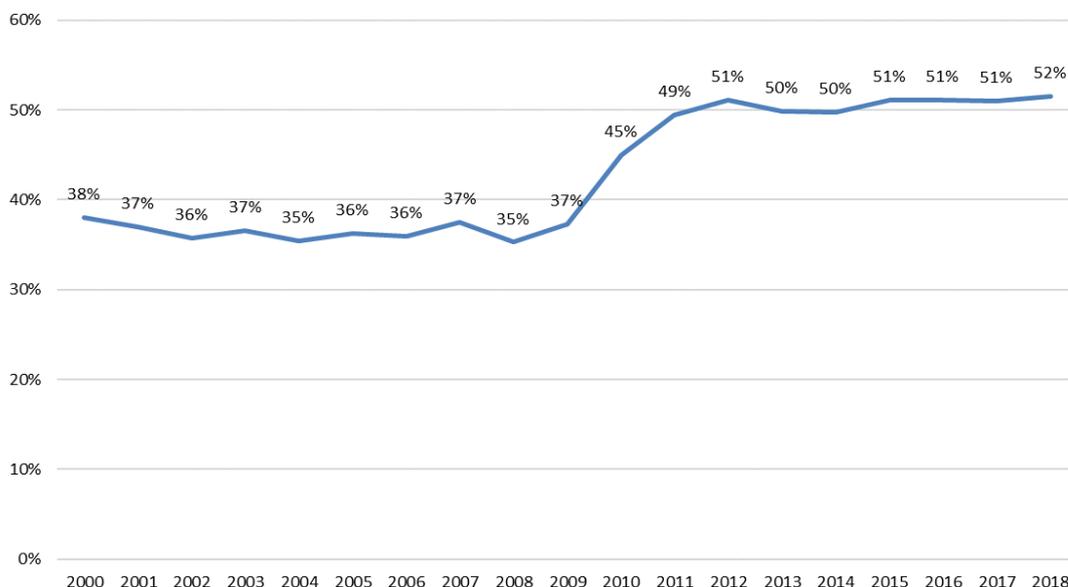
This table provides an overview of the export performance within the Irish-owned client companies in Manufacturing and Information, Communications and Other Services sectors.

Exports by Sector in Irish-owned Companies, 2000, 2009, 2018



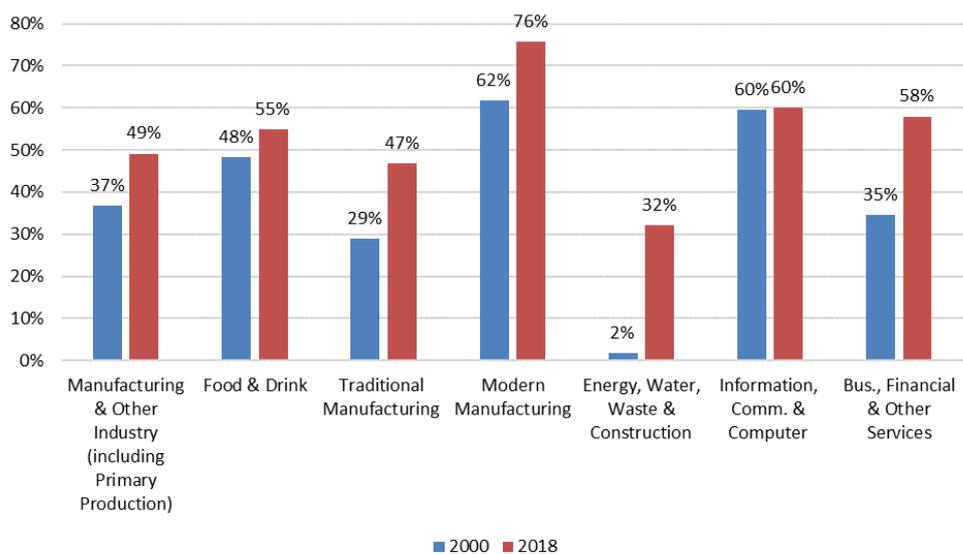
- The Food & Drink sector accounted for 38.0% of all exports of Irish-owned client firms in 2018. This sector has increased exports from €4.6bn in 2000 to €8.7bn in 2018, a per annum increase of 3.6% in current prices.
- Exports in Traditional Manufacturing increased by 6.1% in 2018 over 2017 to €4.3 billion and now accounts for 18.8% of total exports.
- Modern Manufacturing reported an increase of 6.0% to €1.3 billion in 2018 over the 2017 figure and now accounts for 5.5% of total exports.
- The Energy, Water, Waste & Construction sectors increased by 36.0% to €2.1 billion in the year to 2018 with 91.3% of this increase being in the construction sector. Energy, Water, Waste & Construction accounts for 9.3% of total exports.
- Exports of Information, Communication & Computer services among Irish-owned firms show a per annum growth of 5.5% since 2000 to stand at €2.3 billion in 2018. This sector now accounts for 9.8% of total exports.
- The Business, Financial and Other Services sectors exports have shown strong growth at 10.8% per annum since 2000 and exports in this sector amounted to €4.3 billion in 2018. This sector now accounts for 18.7% of total exports.

2.6 Exports as a percentage of Total Sales in Irish-owned Companies, 2000–2018



Linking the data on sales and exports allows us to make an assessment in relation to the export intensity of Irish-owned industry (i.e. exports as a percentage of sales). Overall, there has been a high degree of convergence as regards the level of export intensity with the overall average for all sectors standing at approximately 52% in the last four years. The above graph shows that the total export intensity of Irish-owned industry has increased from 38% in 2000 to 52% in 2018 and highlights the growing importance to Irish businesses of export markets.

Exports as a percentage of Total Sales in Irish-owned Companies, 2000 and 2018



This chart compares the export intensity of Irish-owned industry by sector for 2000 and 2018.

- The Food & Drink sector accounted for 53% of all export sales by Irish-owned companies in 2018 and has an export intensity of 55% in 2018, which is an increase on its 2000 intensity ratio of 48%.
- The sectors with the highest export intensity at 76% in 2018 are in Modern Manufacturing (Chemicals, Medical Devices and Computer, Electronic & Optical Products)
- The Information, Communication and Computer sectors are next with 60% of all sales being exported in 2018, the same level as in 2000.

2.7 Value Added in Irish-Owned Companies, 2000-2018

	Total Value Added			Value Added as % of Sales		Value Added per Person Employed		
	2000	2018	Per Annum Change 2000-18	2000	2018	2000	2018	Per Annum Change 2000-18
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	6,840	16,358	5.0%	29.7%	36.7%	47.9	97.4	4.0%
Manufacturing & Other Industry	4,125	7,367	3.3%	24.2%	22.0%	37.6	76.2	4.0%
Food & Drink	1,497	3,263	4.4%	15.6%	20.6%	35.5	76.3	4.3%
Traditional Manufacturing	2,309	3,544	2.4%	36.1%	38.4%	38.1	75.9	3.9%
Modern Manufacturing	319	260	-1.1%	28.9%	15.6%	45.4	36.0	-1.3%
Energy, Water, Waste, Construction	716	2,490	7.2%	28.4%	37.5%	111.6	145.0	1.5%
Info./Comm./ Other Services	2,000	6,501	6.8%	58.6%	58.2%	74.9	120.0	2.7%
Information, Comm. & Computer	811	2,332	6.0%	55.8%	62.1%	60.1	99.1	2.8%
Business, Fin. & Other Services	1,189	4,169	7.2%	60.6%	56.2%	89.9	136.1	2.3%

Value added is calculated as the total sales of a firm less the cost of materials and services purchased. As a result, it provides a measure of the specific contribution of firms/sectors in terms of economic activity.

- The total value added of Irish-owned Manufacturing and Information, Communication and Other Services is estimated at €16.4 billion in 2018. Total value added is estimated to have grown by 5.0% per annum in nominal terms over the period 2000-2018.
- Across all Irish-owned Manufacturing and Information, Communication and Other Services sectors, value added as a percentage of sales has increased from 29.7% in 2000 to 36.7% in 2018.

- Overall, value added per person employed in Manufacturing and Information, Communication and Other Services is estimated at €97,379 in 2018, an increase of 4.0% per annum in nominal terms since 2000.

Calculation – Value Added

Value Added is calculated as: Sales - Cost of all Materials + Services purchased

2.8 Payroll for Irish-owned Companies, 2000 and 2018

	Total Payroll			Payroll per Employee		
	2000	2018	Per annum change 2000-18	2000	2018	Per annum change 2000-18
	€m	€m	%	€k	€k	%
Total - All Sectors	4,004	8,580	4.3%	28.0	51.1	3.4%
Manufacturing & Other Industry	3,105	5,367	3.1%	26.7	47.2	3.2%
Food & Drink	1,107	1,779	2.7%	26.3	41.6	2.6%
Traditional Manufacturing	1,458	2,226	2.4%	24.0	47.7	3.9%
Modern Manufacturing	199	397	3.9%	28.3	55.0	3.8%
Energy, Water, Waste, Construction	341	966	6.0%	53.1	56.2	0.3%
Info./ Comm./Other Services	900	3,213	7.3%	33.7	59.3	3.2%
Information, Comm./ Computer	550	1,474	5.6%	40.8	62.6	2.4%
Business, Financial & Other Services	350	1,739	9.3%	26.4	56.8	4.3%

This table shows that the total amount paid by Irish-owned Manufacturing and Information, Communication and Other Services on payroll (including taxes etc.) was approximately €8.6 billion in 2018.

- Total payroll has increased at a rate of 4.3% per annum over the period 2000-2018. Payroll in the Manufacturing sector and the Information, Communication and Other Services sector increased from €4.0 billion in 2000 to €8.6 billion in 2018. Manufacturing and Other Industry firms accounts for 62.5% (€5.4 billion) of total payroll and Information, Communication and Other Internationally Traded Services firms account for the remaining 37.5% (€3.2 billion) in 2018.

Payroll per employee in Irish-owned Manufacturing and Information, Communication and Other Services sectors averaged at €51,079 in 2018, representing an increase of 3.4% per annum over the period 2000 to 2018.

- In the Manufacturing sector, payroll per employee increased from €26,712 in 2000 to €47,163 in 2018. This is a per annum increase of 3.2%.
- In the Information, Communication and Other Services sectors, payroll per employee increased by 3.1% per annum going from €33,678 in 2000 to €59,308 in 2018.
- The highest average payroll per employee figure in 2018, was €62,594 in the Information, Communications and Computer sector.

Definition - Payroll

Payroll Wages, salaries, pensions and other payroll costs for employees within the Republic of Ireland (includes all bonuses, PRSI, other taxes and levies but excludes redundancy payments and agency staff costs).

2.9 Materials-Services Purchased by Irish-owned Companies, 2018

	Materials Purchased 2018			Services Purchased 2018		
	Total Materials	Irish Materials	Irish as % Total	Total Services	Irish Services	Irish as % Total
	€m	€m	%	€m	€m	%
Total - All Sectors	19,371	12,041	62.2%	8,861	5,804	65.5%
Manufacturing & Other Industry	17,843	11,528	64.6%	5,713	4,293	75.1%
Food & Drink	10,977	8,629	78.6%	1,635	1,382	84.6%
Traditional Manufacturing	4,461	1,801	40.4%	1,227	997	81.2%
Modern Manufacturing	865	165	19.1%	243	160	66.1%
Energy, Water, Waste, Construction	1,539	933	60.6%	2,609	1,754	67.2%
Information, Comm. & Other Services	1,528	512	33.5%	3,148	1,511	48.0%
Information, Comm. & Computer	531	134	25.3%	892	569	63.9%
Business, Financial & Other Services	997	378	37.9%	2,256	941	41.7%

Total raw materials purchases amounted to approximately €19.3 billion in 2018, of which €12.0 billion (62.2%) was sourced in Ireland.

- Within the Food and Drink sector, Irish raw materials at €8.6 billion accounted for 78.6% of the total materials spend in that sector. Of all the Irish raw materials purchases by Irish-owned firms, the majority or 71.6% related to the Food and Drink sector in 2018.
- Within the Traditional Manufacturing sectors, 40.4% of materials were sourced in Ireland in 2018, amounting to over €1.8 billion in value.
- For Modern Manufacturing, 19.1% of total materials purchases were Irish materials, amounting to €165 million.

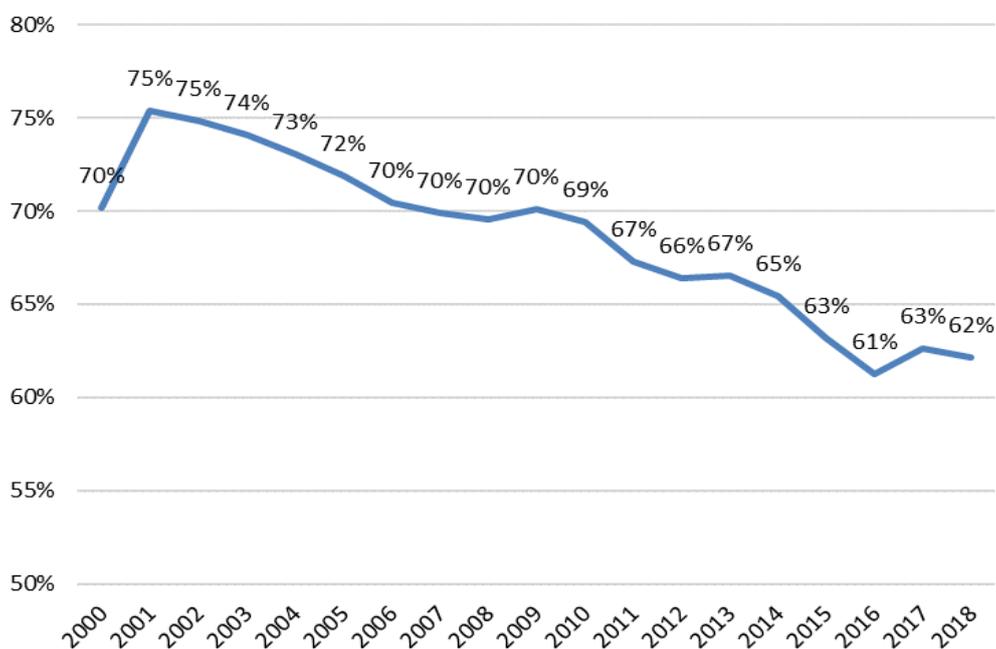
- In the Energy, Water, Waste & Construction sectors 60.6% of all materials were bought in Ireland in 2018.

In addition to raw materials, Irish-owned Manufacturing and Information, Communication and Other Services firms spent a further €8.9 billion on services in 2018, with 65.5%, or €5.8 billion sourced in Ireland.

- The proportion of Irish services purchased by Irish-owned firms, ranges from 41.7% for Business, Financial and Other Services firms to 84.6% for Food and Drink firms.
- Overall, the €12.0 billion of materials purchased in Ireland in 2018 continue to significantly outweigh the services purchased in Ireland which stand at €5.8 billion.

Definition - Services
 The cost of all bought-in services e.g. agency fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services, professional fees etc. Also included are royalty payments.

2.10 Irish-Sourced Materials as a Share of Total Material Purchased, 2000-2018

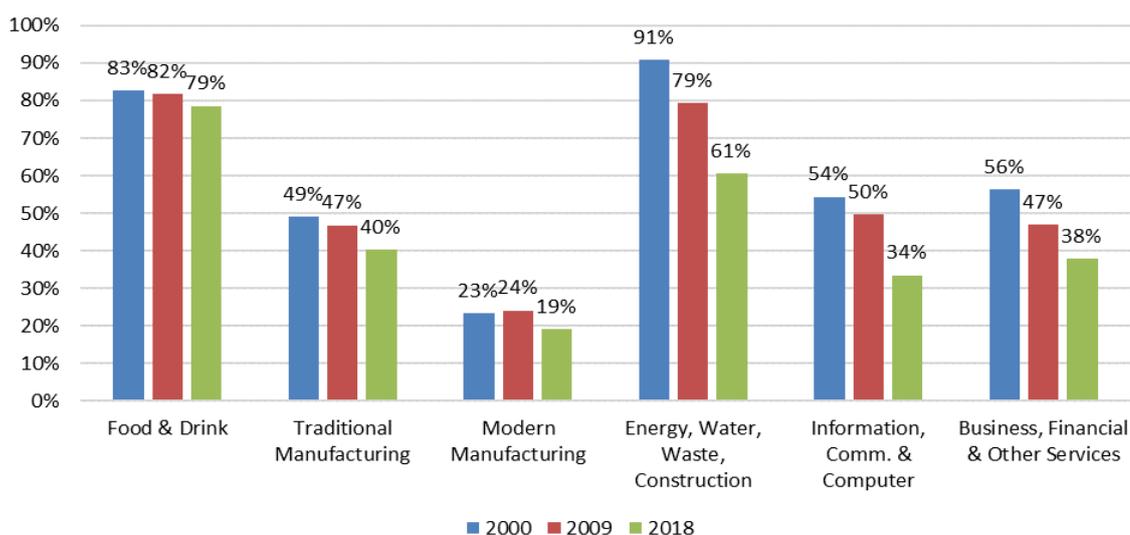


This graph maps out the share of total materials sourced in Ireland by Irish-owned Manufacturing and Services firms. In 2018, 62% of all materials purchased were sourced in Ireland compared with 70% in 2000. The 2018 returns showed a decrease of 1.0% over the 2017 figures.

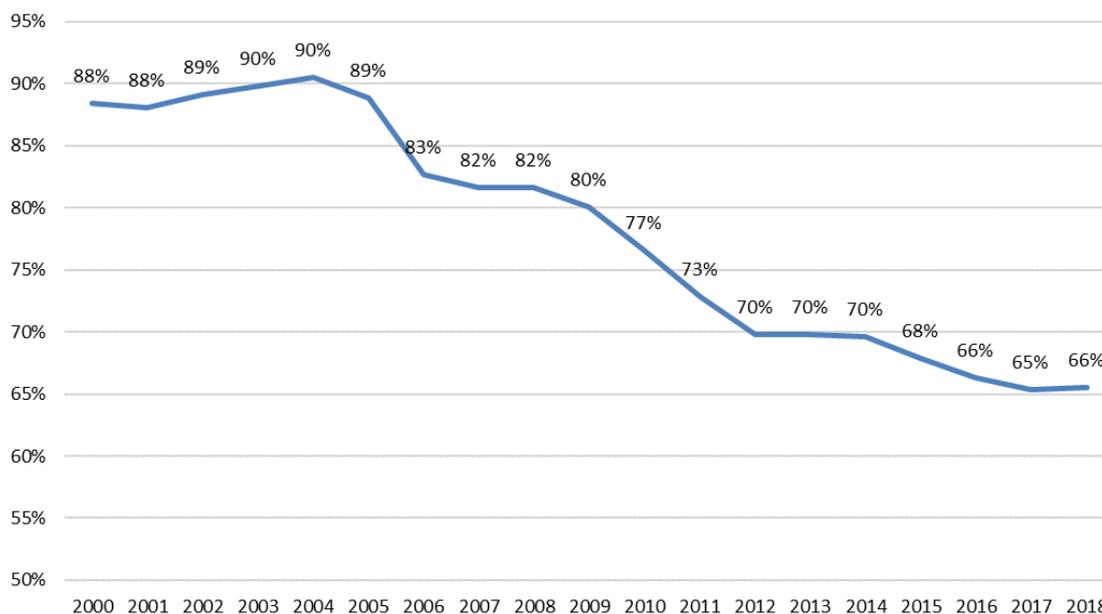
The bar chart below sets out the position by sector for 2000, 2009 and 2018:

- The Food & Drink sector purchased the majority or 78.6% of its materials in Ireland in 2018. This represents a decline from the 2000 and 2009 figures of 82.6% and 81.8%. (Absolute value was €8,629m).
- There has also been a decline in the percentage of materials sourced in Ireland by the Energy, Waste, Water & Construction sectors, in 2000 the figure was 90.8%, but in 2018 the percentage of Irish sourced materials was 60.6% (Absolute value was €933m).
- The Traditional Manufacturing sector share of Irish-sourced materials stood at 49.1% in 2000 and has decreased since and its purchases of Irish-sourced materials now represent 40.4% of total materials outlay in 2018. (Absolute value was €1,801m).
- The total value of Irish materials purchased by the services sectors amounted to €512m in 2018, 33.5% of their total spend on materials.

Irish-Sourced Materials as a Share of Total Material Purchased, 2000, 2009, 2018



2.11 Irish-Sourced Services as a Share of All Service Purchased, 2000-2018



This graph shows the share of total services sourced in Ireland by Irish-owned Manufacturing and Services firms. At 66%, the majority of services' purchases were sourced in Ireland in 2018 though this represents a decline from 88% from 2000.

The bar chart below shows that purchases of Irish services ranged between 48% in the Business, Finance & Other Services sector to 85% in the Traditional Manufacturing sector in 2018. Since 2000, the percentage of services purchased in Ireland has decreased across most sectors.

The Food and Drink sector's share of Irish services purchases has decreased from 91% in 2000 to 75% in 2018. (Absolute value was €1,382m).

Traditional Manufacturing increased its share of Irish services purchases to 85% in 2018 from 82% in 2000. (Absolute value was €997 million).

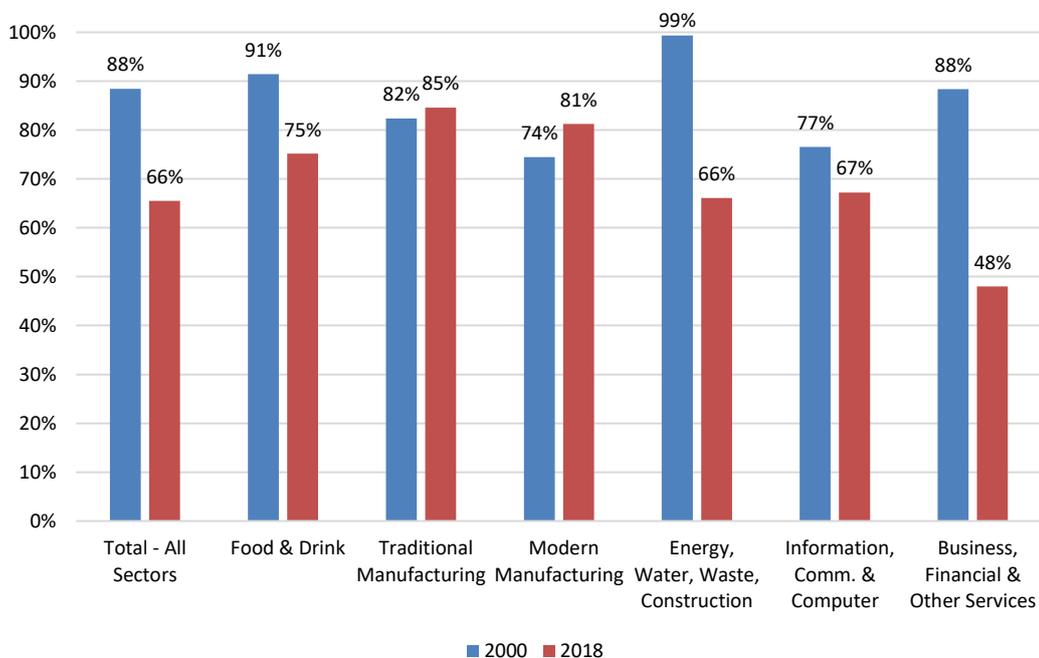
The Modern Manufacturing sector's share of services sourced in Ireland increased from 74% in 2000 to 81% in 2018. (Absolute value was €160 million).

The Information, Communications and Computer sector's share of services purchases sourced in Ireland fell from 77% in 2000 to 67% in 2018. (Absolute value was €569 million).

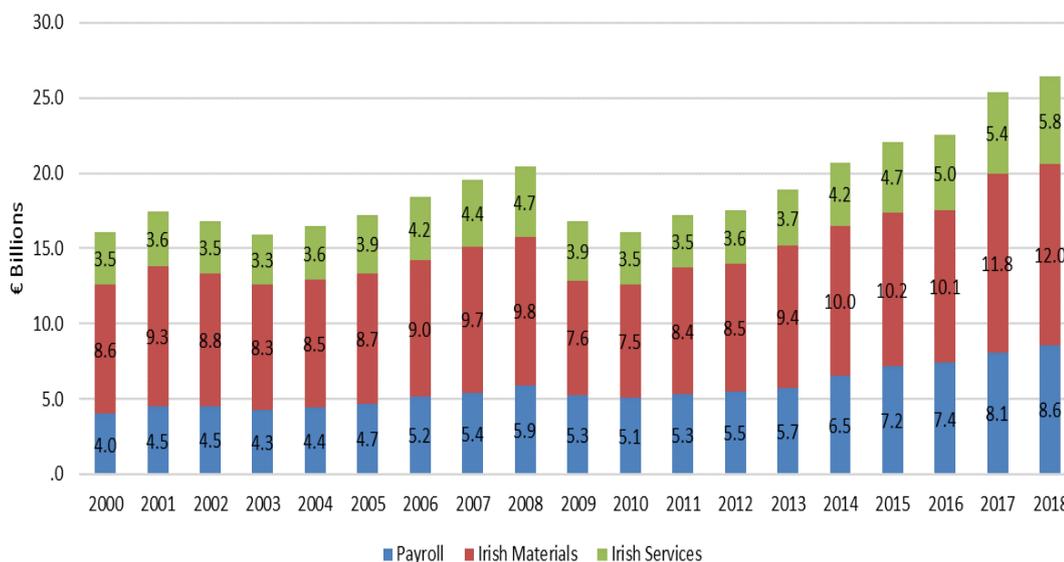
The Business, Financial and Other Services sector sourced 48% of their services requirements in Ireland in 2018, down from 88% in 2000. (Absolute value was €864 million).

The Energy, Water, Waste & Construction sectors sourced 66% of their services in Ireland at a value of €1,754m.

Irish-Sourced Services as a Share of All Service Purchased, 2000 and 2018



2.12 Total Direct Expenditure in the Irish Economy by Irish-Owned Companies, 2000-2018



This chart summarises the total expenditure in the domestic economy by Irish-owned manufacturing and services firms throughout the period 2000-2018.

- In total, Irish-owned firms spent €26.4 billion in the domestic economy in 2018, comprising of:

- €8.6 billion on payroll;
- €12.0 billion on Irish raw materials;
- €5.8 billion on Irish services.

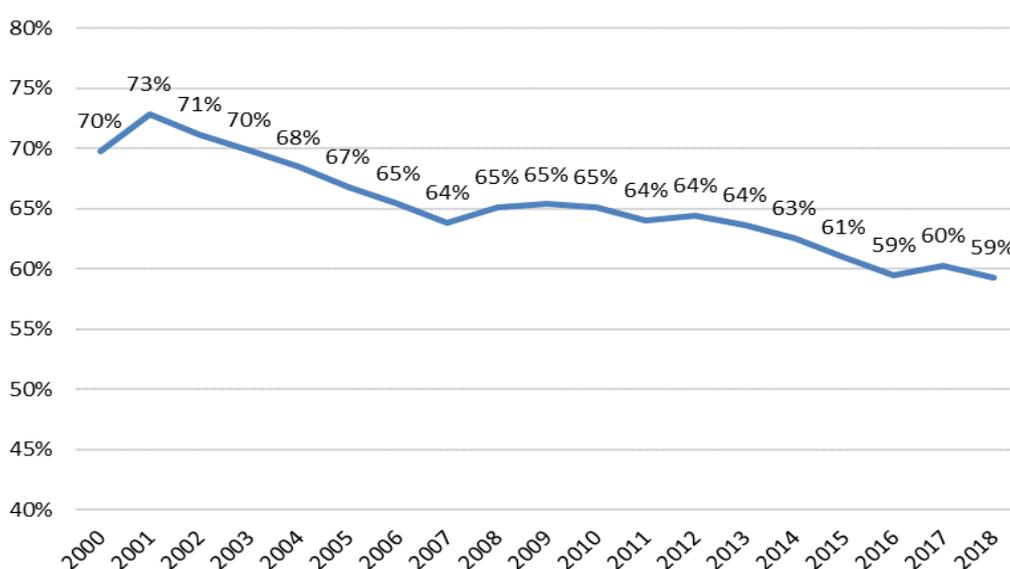
This represents an annual increase in 2018 of 4.2% over 2017 returns.

- Direct expenditure has increased from €16.1 billion in 2000 and shows an overall nominal increase of 2.8% per annum between 2000 and 2018. Over the period 2000 to 2018:
 - Expenditure on payroll increased at 4.3% per annum.
 - Expenditure on materials sourced in Ireland has increased by 1.9% per annum.
 - Expenditure on services sourced in Ireland has increased by 2.9% per annum.
- The composition of direct expenditure has changed over this series. In 2000 payroll made up 25%, Irish materials were 53% and Irish services were 22% of total Irish economy expenditure. In 2018, these shares have changed, with payroll now making up 32%, Irish materials accounting for 46% and Irish services accounting for 22% of total expenditure in the Irish economy.

Calculation – Direct Expenditure in the Irish Economy (DEIE)

DEIE is calculated as the sum of: (Payroll + Irish Services + Irish Materials)

2.13 Total Direct Expenditure in the Irish Economy as a percentage of Sales in Irish-Owned Companies, 2000-2018

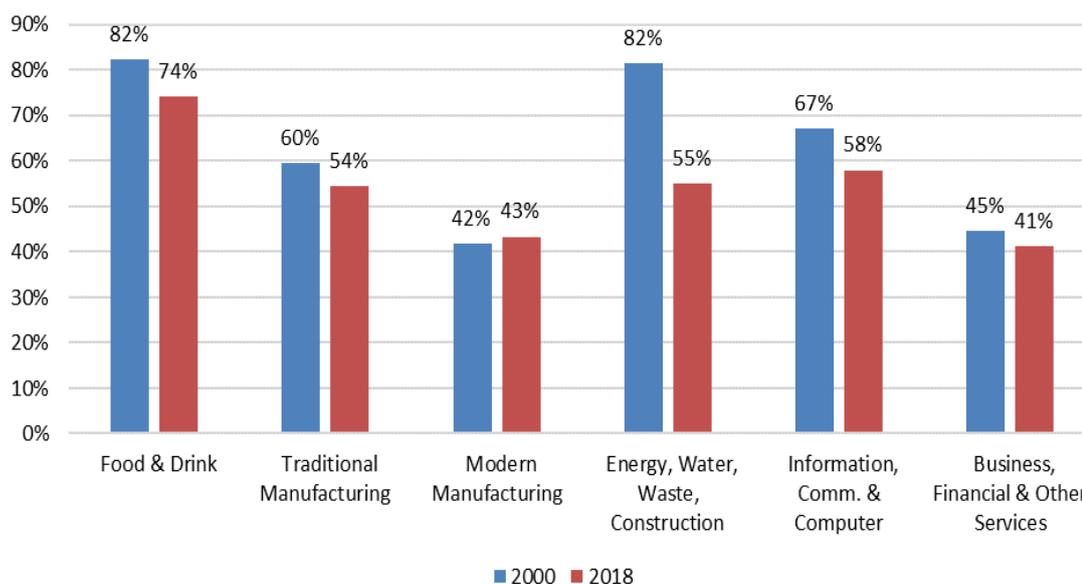


This chart shows the trend in direct expenditure in the economy as a percentage of sales for all Irish-owned firms and for the broad aggregated sectors.

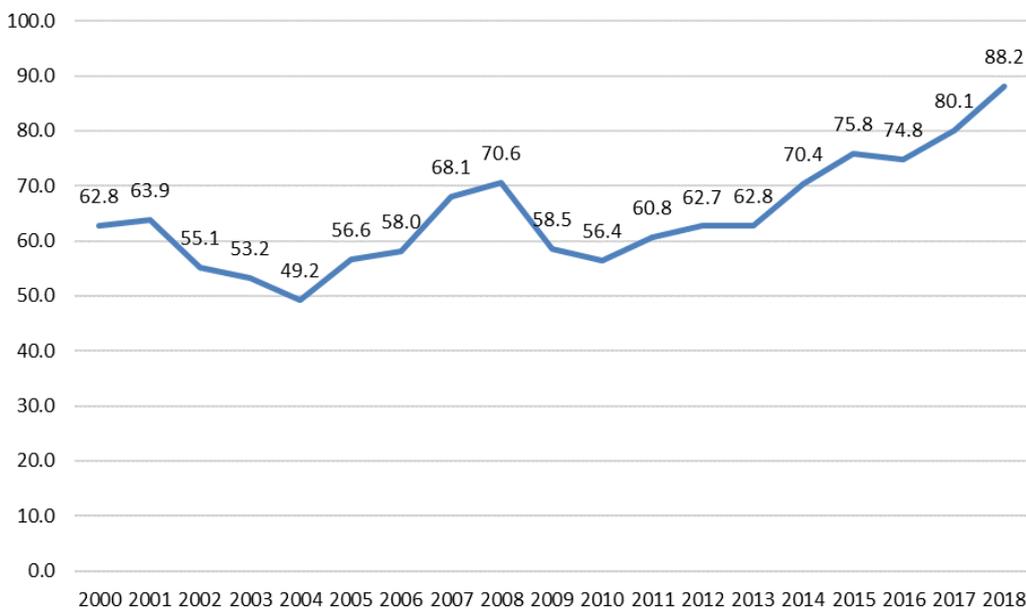
Total direct expenditure as a percentage of sales stood at 70% in 2000. By 2009 this percentage had reduced to 65% and in 2018 stands at 59%.

- The Food and Drink sector maintained the highest share of direct expenditure as a percentage of sales at 74% in 2018 down from 82% in 2000.
- The Energy Water, Waste and Construction sector also saw a fall-off on this metric from 82% in 2000 to 55% in 2018.
- In percentage terms direct expenditure in the Information, Communications and Computer Services sector stood at 67% of sales in 2000 and decreased to 58% in 2018.
- All other sectors have seen a fall in their direct expenditure in the Irish economy as a percentage of sales.

Total Direct Expenditure in the Irish Economy as a percentage of Sales in Irish-Owned Companies



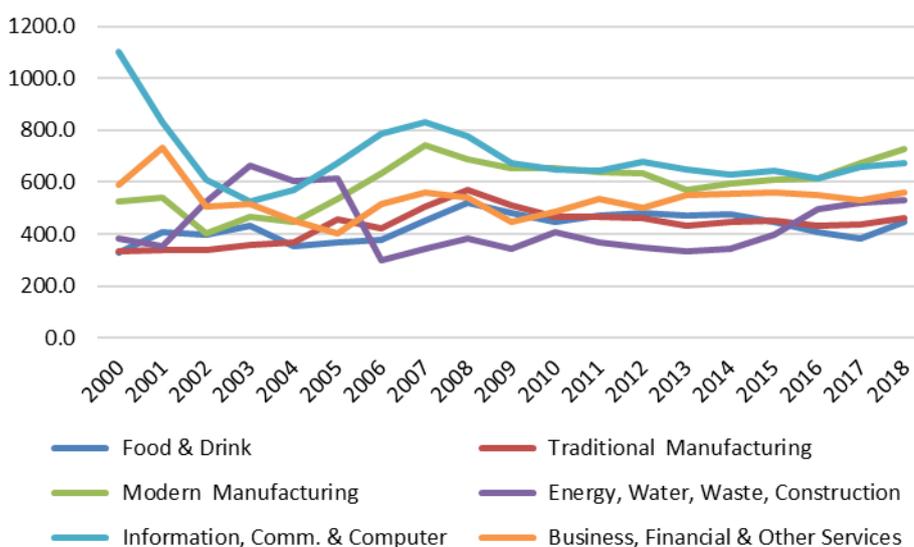
2.14 Formal Structured Training in Irish-owned Companies, 2000-2018



Total expenditure on training amounted to €88.2 million in 2018. This is the highest amount Irish-owned companies spent on formal structured training in the time series.

- The manufacturing and other sectors spent €55.1 million on training in 2018, accounting for 61.4% of total training expenditure.
- Expenditure on training in the services sectors also increased in 2018 to €33.1 million.

Formal Structured Training per person employed in Irish-owned Companies by Sector, 2000-2018



The sector with the largest spend on training is the Traditional Manufacturing sector.

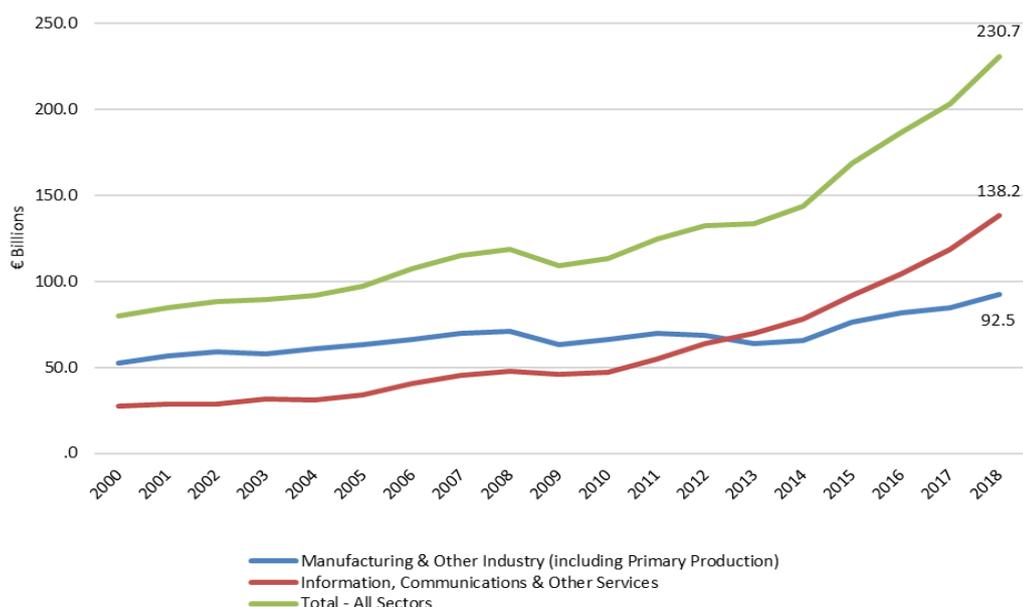
- The Traditional Manufacturing sector spent €21.5 million on training in 2018 which represents 24.4% of all training expenditure by all Irish-owned client companies.
- The next highest spending sector was Food & Drink with €19.2 million in 2018.
- Overall expenditure on training per person employed in Irish-owned companies increased from €489.2 in 2017 to €542.9 in 2018. Since 2000 expenditure on training per person has increased from €439.2 to €425.9.
- The biggest change in training per person employed was in the IT Services sector where it decreased from €1101.5 in 2000 to €611.1 in 2018, a decline of 38.7%. Manufacturing and Other Industries increased expenditure on training per person employed by 40.3% between 2000 and 2018.

Definition of Training

Expenditure on formal, structured training to management and staff (in-house or off-site)

Chapter 3: Key Business Indicators for Foreign-owned Agency Clients

3.1 Sales - Foreign-owned Client Companies, 2000-2018



Total sales of foreign-owned agency assisted companies increased by 13.6% per annum in nominal terms over 2017, amounting to €230.7 billion in 2018.

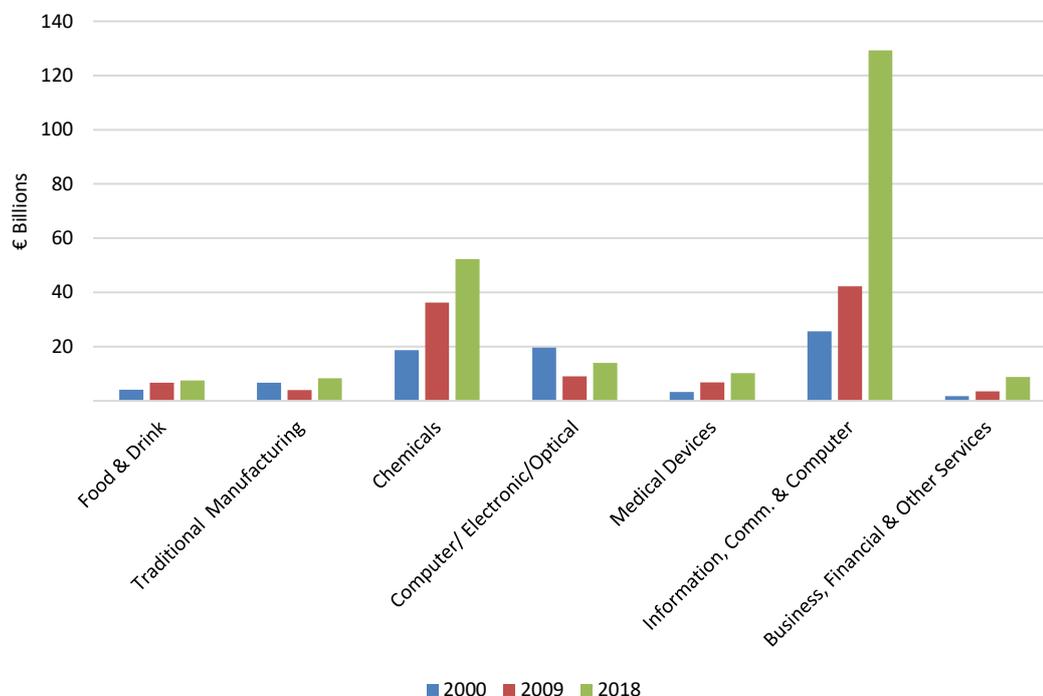
- Manufacturing and Other Industry sectors accounted for €92.5 billion of total sales, equating to 40.1% of all sales in foreign-owned companies.
 - Sales in the Manufacturing sectors increased by 9.3% in 2018 over the previous year.
 - The per annum average increase over the nineteen years from 2000-2018 for Manufacturing sectors is 3.2%. Sales have fluctuated since 2009 but the last four years saw a substantial recovery in the value of total sales.
- Sales in the Internationally-traded Services⁵ sectors have continued to exceed those of the Manufacturing sectors and this trend has continued since 2013.
 - Internationally-traded Services sales have steadily increased from €27.4 billion in 2000 to €138.2 billion in 2018. This is a per annum average increase of 9.4% over that nineteen-year period.
 - The 2018 sales figure of €138.2 billion represents an increase of 17% over the 2017 sales figure of €118.4 billion.

⁵ Agency client companies in the International Financial Services sector are not included in this survey. For a full list of the services sectors see Appendix 2

3.2 Sales & Sales Growth by sector - Foreign-owned Companies

	2000	2009	2017	2018	Per Annum Change 2000-18	Per Annum Change 2009-18	Per Annum Change 2017-18
	€m	€m	€m	€m	%	%	%
Total - All Sectors	79,965	108,763	203,033	230,676	6.4%	8.7%	13.6%
Manufacturing & Other Industry	52,494	62,945	84,572	92,425	3.4%	4.4%	9.3%
Food & Drink	4,107	6,683	7,751	7,563	3.7%	1.4%	-2.4%
Traditional Manufacturing	6,746	4,047	7,852	8,379	1.3%	8.4%	6.7%
Chemicals	18,712	36,258	46,656	52,232	6.2%	4.1%	12.0%
Computer/Electronic/Optical	19,630	9,107	12,860	13,961	-2.0%	4.9%	8.6%
Medical Devices	3,298	6,850	9,452	10,290	6.9%	4.6%	8.9%
Infor., Comm. & Other Services	27,448	45,785	118,397	138,187	10.0%	13.1%	16.7%
Infor., Comm. & Computer	25,698	42,215	111,386	129,319	10.0%	13.2%	16.1%
Bus., Financial & Other	1,750	3,570	7,011	8,868	10.0%	10.6%	26.5%

Sales by sector - Foreign-owned Companies, 2000, 2009, 2018



Between 2000 and 2018, the Information, Communications and Computer Services sector, recorded a per annum growth of 10.0% and at €129.3 billion represented 60.0% of total sales by foreign-owned client firms in 2018.

- The Chemicals sector accounted for 22.6% of total sales in 2018. Sales in the sector totalled €52.2 billion in 2018, a per annum increase of 6.2% over the 2000 sales figure of €18.7 billion.
- The Computer, Electronic and Optical Products sector reported sales of €13.9 billion in 2018, an 8.6% increase over the 2017 figure of €12.8 billion. This is a sector that has seen a per annum decrease of 2.0% since 2000.

3.3 Changing Composition of Sales and Employment in Foreign-owned Client Companies 2000 and 2018

Year	Sales		Employment	
	2000	2018	2000	2018
Manufacturing & Other Industry	65.7%	40.1%	73.4%	49.0%
Food & Drink	5.1%	3.3%	6.2%	3.1%
Traditional Manufacturing	8.9%	3.6%	25.4%	10.0%
Chemicals	23.4%	22.6%	13.5%	12.6%
Computer, Electronic & Optical Products	24.5%	6.1%	19.0%	7.2%
Medical Devices	4.1%	4.5%	9.2%	15.8%
Information, Comm. & Other Services	34.3%	59.9%	26.6%	51.0%
Information, Comm. & Computer	32.1%	56.1%	24.2%	39.5%
Business, Financial & Other Services	2.2%	3.8%	2.4%	11.5%

This table traces the evolution of the foreign-owned Manufacturing and Information, Communication and Other Services Internationally Traded Services base over the period 2000 to 2018.

In terms of sales, the relative importance of manufacturing activity has decreased, accounting for 40.1% of all sales in 2018, down from 65.7% in 2000. The Information, Communication & Other Services now accounts for 59.9% of sales, up from 34.3% in 2000.

In 2018, the following two sectors made up 82.5% of total sales of foreign-owned companies:

- Information, Communication and Computer Services sector (56.1%)
- Chemicals sector (22.6%)

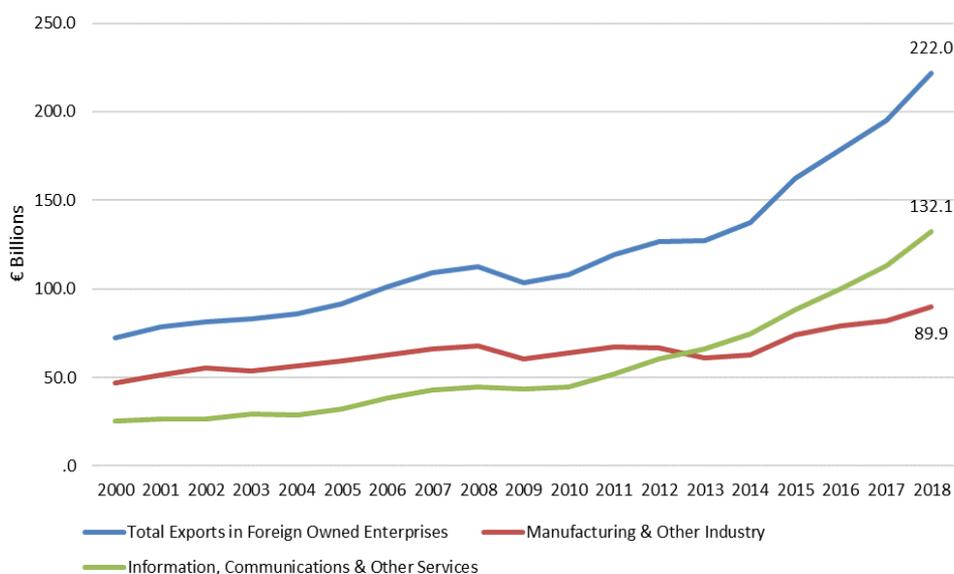
In terms of employment, a different pattern emerges, with Manufacturing accounting for just under half of employment (49%) in 2018.

- The Medical Devices sector has 15.8% of employment, up from 9.2% in 2000.
- The Chemicals sector is the next most significant in terms of employment with 12.6% which is a decrease on the 2000 figure of 13.5%.

In Internationally-traded Services:

- The Information, Communications and Computer Services sector has the highest share of total employment, at 39.5% in 2018, up from 24.2% in 2000.

3.4 Exports in Foreign-owned Client Companies, 2000-2018



The above graph provides information relating to exports by foreign-owned client companies in Ireland.

The 2018 export sales figure of foreign-owned companies in Ireland at €222.0 billion equates to 96.5% of the total reported sales by these firms.

In 2013, the value of exports in the Services sectors outstripped those of the Manufacturing sectors for the first time.

- Exports in the Services sectors increased by 16.9% in 2018 over the 2017 figure of €113.0 billion and with the exception of 2009 have recorded increases in every year since 2004.
 - The Information, Communications and Computer Services sector accounted for 59.5% of all export sales in 2018 at €132.1 billion.
 - This important sector has seen an annual average increase of 9.6% in the nineteen-year period between 2000 and 2018.
- The Manufacturing sectors accounted for 40.5% of all exports in foreign-owned companies in Ireland in 2018 and amounted to €89.9 billion.
 - Manufacturing exports increased by 9.4% in 2018 over the 2017 export sales figure of €82.2 billion.
 - The average annualised increase in Manufacturing exports since 2000 is 3.7% from a base of €46.9 billion in current prices, with notable decreases in 2009, 2012 and 2013 before recovering in years 2014 - 2018.

3.5 Exports by Sector in Foreign-owned Companies, 2000, 2009, 2017 and 2018

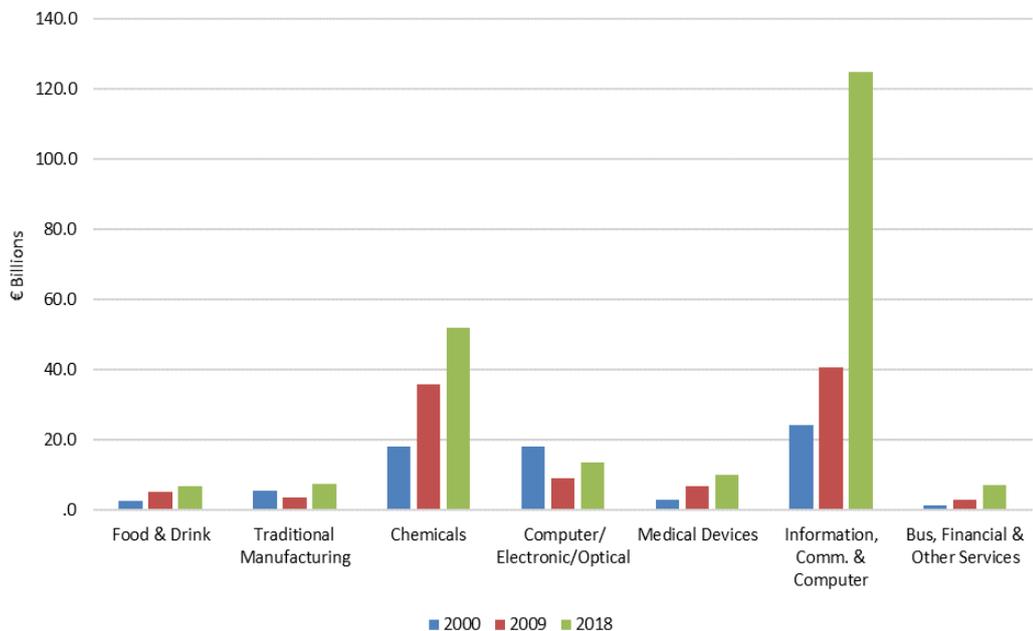
	2000	2009	2017	2018	Per Annum Change 2000-18	Per Annum Change 2009-18	Per Annum Change 2017-18
	€m	€m	€m	€m	%	%	%
Total All Sectors	72,312	103,607	195,205	222,013	6.8%	8.8%	13.7%
Manufacturing & Other Industry	46,954	60,277	82,190	89,896	3.9%	4.5%	9.4%
Food & Drink	2,537	5,266	6,931	6,715	5.9%	2.7%	-3.1%
Traditional Manufacturing	5,352	3,472	6,989	7,401	1.9%	8.8%	5.9%
Chemicals	17,910	35,843	46,297	51,900	6.5%	4.2%	12.1%
Computer, Electronic & Optical	18,170	8,935	12,608	13,675	-1.7%	4.8%	8.5%
Medical Devices	2,963	6,730	9,308	10,146	7.5%	4.7%	9.0%
Infor., Comm. & Other Services	25,358	43,330	113,015	132,117	10.2%	13.2%	16.9%
Infor., Comm. & Computer	24,048	40,519	107,607	124,946	10.2%	13.3%	16.1%
Bus., Financial & Other Services	1,310	2,811	5,408	7,170	10.5%	11.0%	32.6%

The Information, Communications & Computer services sector had the largest level of exports in 2018 at €124.9 billion. This is an increase of 16.1% over 2017 and an 10.2% annual increase in nominal terms since 2000 when exports stood at €24.0 billion.

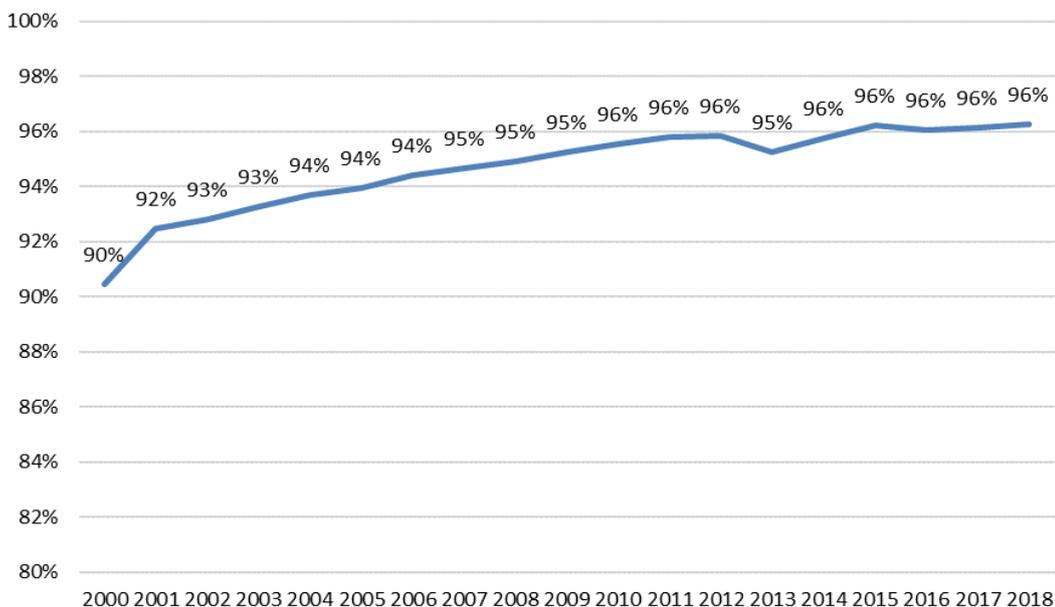
Exports in the Chemicals sector were also significant in 2018 at €51.9 billion, an increase of 12.1% in 2017 over 2017 and an average annual increase of 6.5% since 2000.

The Computer, Electronic & Optical sector saw an increase of 8.5% 2018 over 2017 with exports of €13.7 billion. This sector's exports experienced an average annual decrease of 1.7% between 2000 and 2018.

Exports by Sector in Foreign-owned Companies, 2000, 2009, and 2018

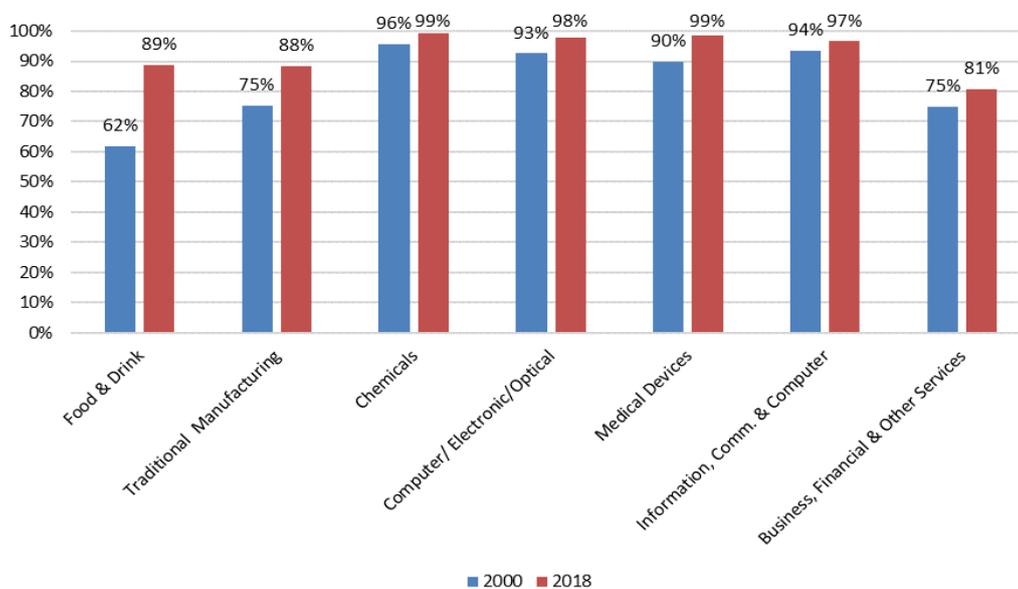


3.6 Exports as a percentage of Total Sales in Foreign-owned Companies, 2000-2018



- The total export intensity of foreign-owned industry has increased from 90% in 2000 to 96% in 2010 and has been stable since then.
- All sectors have increased their export intensity since 2000.

Exports as a percentage of Total Sales in Foreign-owned Companies, 2000, 2018



- The foreign-owned high-tech manufacturing sectors of: Chemicals, and Medical Devices produce goods almost exclusively for export with approximately 98% - 99% of all sales being exported respectively.
- The Information, Communication and Computer Services sector exported 97% of their services in 2018, up from 94% in 2000.
- The Food & Drink sector, with an 89% share of sales for export in 2018, increased its proportion of exports from 62% in 2000.
- Similarly, the Traditional Manufacturing sector has increased its proportion of sales for export, from 75% in 2000 to 88% in 2018.

3.7 Value Added in Foreign-owned Companies, 2000-2018

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2018	Per Annum Change 2000-18	2000	2018	2000	2018	Per Annum Change 2000-18
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	33,882	79,955	5.2%	42.4%	34.7%	202.3	433.3	4.6%
Manu./ Other Industry	24,116	46,139	3.9%	45.9%	49.9%	196.1	510.5	5.8%
Food & Drink	1,897	3,810	4.2%	46.2%	50.4%	182.3	668.6	7.9%
Traditional Manu.	2,361	2,801	1.0%	33.3%	33.4%	55.4	151.5	6.1%
Chemicals	10,525	26,857	5.7%	56.2%	51.4%	466.5	1152.6	5.5%
Computer, Electronic & Optical	7,464	8,441	0.7%	38.0%	60.5%	234.5	634.3	6.0%
Medical Devices	1,858	4,222	4.9%	56.3%	41.0%	120.3	144.4	1.1%
Inform./ Comm. & Other Services	9,766	33,816	7.6%	35.6%	24.5%	219.3	359.2	2.9%
Information/ Comm. & Computer	8,486	28,776	7.4%	33.0%	22.3%	209.4	395.1	3.8%
Business, Fin. & Other Services	1,280	5,040	8.4%	73.2%	56.8%	319.5	236.5	-1.8%

The total value added of foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €79.9 billion in 2018.

Although total value added grew at a rate of 5.2% per annum in nominal terms over the period 2000-2018, there are differences at sectoral level. There was growth of 7.6% per annum in value added in the Information, Communication and Other Internationally Traded Services sectors over this period and growth of 3.9% per annum in the manufacturing sectors.

Across all foreign-owned sectors, value added as a percentage of sales has dropped from 42.4% in 2000 to 34.7% in 2018.

Overall, value added per person employed in Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €433.3 in 2018, an increase of 4.3% per annum in nominal terms since 2000.

Calculation – Value Added

Value Added is calculated as: (Sales - Cost of all Materials + Services purchased)

3.8 Payroll for Foreign-owned Companies, 2000 and 2018

	Total Payroll			Payroll per Employee		
	2000	2018	Per annum change 2000-18	2000	2018	Per annum change 2000-18
	€m	€m	€m	€k	€k	%
Total - All Sectors	6,092	13,832	4.9%	36.4	75.0	4.3%
Manufacturing & Other Industry	4,310	6,570	2.5%	35.0	72.7	4.4%
Food & Drink	433	448	0.2%	41.6	78.5	3.8%
Traditional Manufacturing	1,274	1,119	-0.8%	29.9	60.5	4.2%
Chemicals	955	2,088	4.7%	42.3	89.6	4.5%
Computer Electronic Optical	1,201	1,014	-1.0%	37.7	76.2	4.2%
Medical Devices	435	1,871	9.0%	28.2	64.0	4.9%
Info./ Comm./Other Services	1,781	7,262	8.6%	40.0	77.1	3.9%
Information, Comm. & Computer	1,598	5,638	7.7%	39.4	77.4	4.0%
Business, Financial & Other	184	1,623	13.7%	45.9	76.2	3.0%

The total payroll bill of foreign-owned firms amounted to €13.8 billion in 2018 with manufacturing accounting for €6.6 billion (47.5%) and services contributing the balance of €7.3 billion (52.5%).

Total payroll per person employed averaged €74,956 in 2018, representing an increase of 4.3% per annum in nominal terms over the period 2000-2018.

Payroll per employee in the Information, Communication and Other Internationally Traded Services sector and the Manufacturing sectors averaged €77,131 and €72,690 respectively in 2018.

The Chemicals sector had the highest average payroll per capita of all sectors in 2018 at €89,626, followed by Food and Drink with €78,550 and Information, Computer and Computer Services with €77,412.

Definition - Payroll

Payroll Wages, salaries, pensions and other payroll costs for employees within the Republic of Ireland (includes all bonuses, PRSI, other taxes and levies but excludes redundancy payments and agency staff costs).

3.9 Materials & Services Purchased by Foreign-Owned Companies, 2018

	Materials Purchased 2018			Services Purchased 2018		
	Total Materials	Irish Materials	Irish as % of Total	Total Services	Irish Services	Irish as % of Total
	€m	€m	%	€m	€m	%
Total - All Sectors	26,581	3,510	13.2%	124,139	6,131	4.9%
Manufacturing & Other Industry	19,534	3,218	16.5%	26,816	2,669	10.0%
Food & Drink	1,643	808	49.2%	2,111	556	26.3%
Traditional Manufacturing	4,768	541	11.4%	809	353	43.6%
Chemicals	7,114	497	7.0%	18,261	974	5.3%
Computer/Electronic/Optical Prod.	3,037	457	15.0%	2,483	245	9.9%
Medical Devices	2,963	915	30.9%	3,104	537	17.3%
Infor./Comm. & Other Services	7,047	292	4.1%	97,323	3,463	3.6%
Information, Comm. & Computer	6,645	236	3.5%	93,898	2,872	3.1%
Business/Financial & Other Services	402	56	14.0%	3,425	591	17.3%

In overall terms, foreign-owned sector spent €26.6 billion on materials, of which €3.5 billion or 13.2% relates to materials sourced in Ireland (either by indigenous suppliers or other foreign-owned multinationals in the country).

- The largest proportion of Irish-sourced materials is found in the Food & Drink sector where 49.2% of all materials purchased were sourced in Ireland. In monetary terms, this amounted to €808 million spent in Ireland in 2018.
- The Medical Devices sector sourced 30.9% of their materials in Ireland.

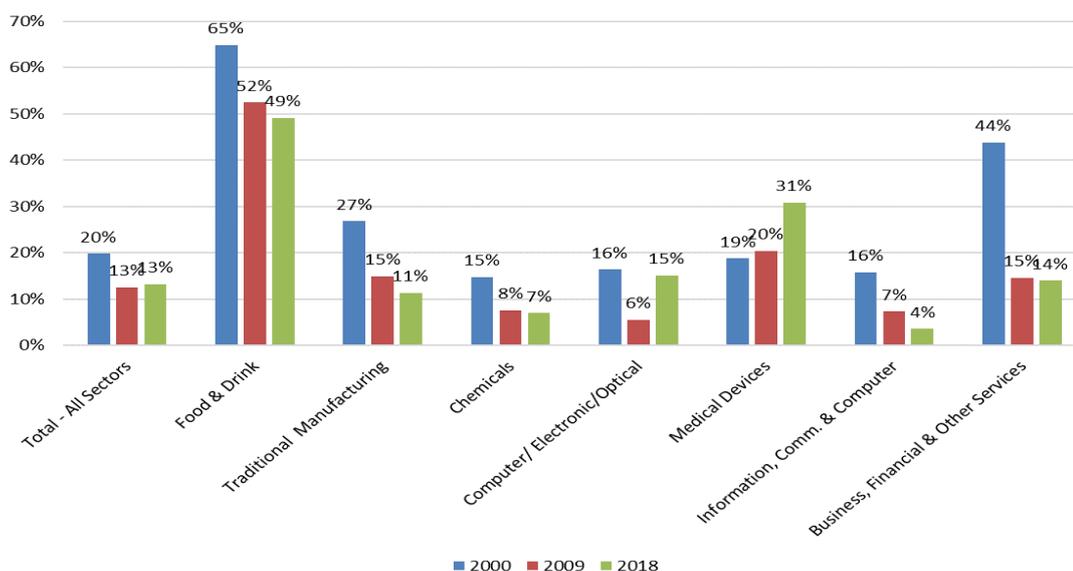
Foreign-owned sector spend, on services sourced in Ireland, amounted to €6.1 billion in 2018 or 4.9% of total services. The total spends on services amounted to €124.1 billion - it should be noted that this figure includes royalty payments.

- The services sector with the highest spend on Irish services was the Information, Communication and Computer sector which spent €2.9 billion or 3.1% of a total spend of €93.9 billion on services in 2018.
- Traditional Manufacturing had the highest proportion on Irish-sourced services at 43.6% of its total spend.

Definition - Services

The cost of all bought-in services e.g. agency fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services, professional fees etc. Also included are royalty payments.

3.10 Irish-Sourced Materials as a Share of All Materials Purchased by Foreign-Owned Client Companies, 2000-2018



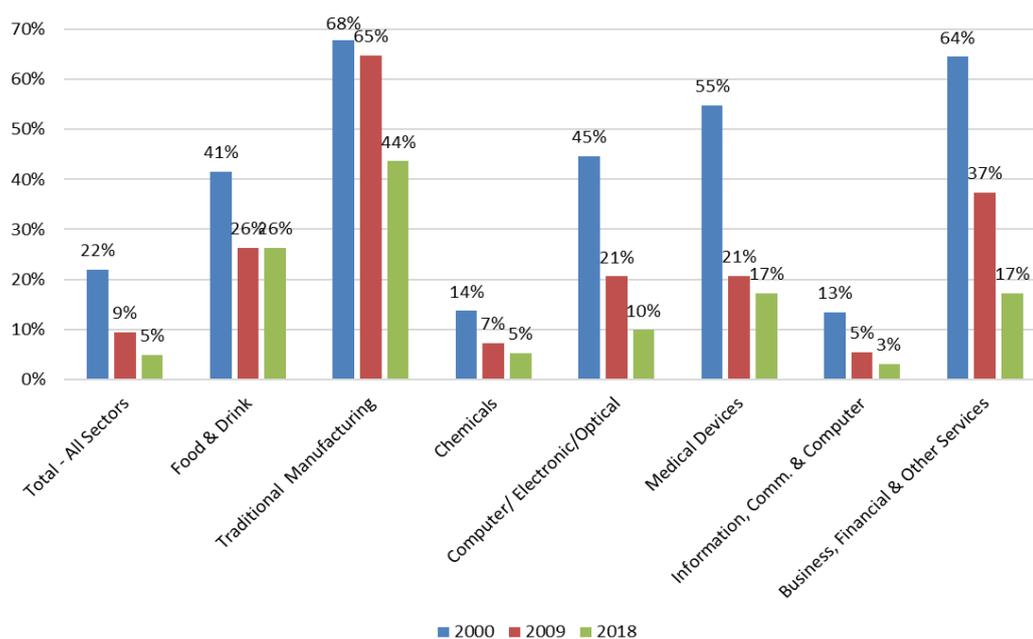
This graph depicts trends in the share of materials purchased by foreign-owned companies that were sourced in Ireland. The trend in the share of materials purchased in Ireland was in decline for all sectors between 2001 and 2008. The percentage of materials purchased in Ireland was at its lowest level in 2006 and 2008 at 11% and stands at 13% in 2018.

The sector with the largest share of materials purchased in Ireland is the Food & Drink sector with 49%, though this share has dropped from 52% in 2008 and 65% in 2000. (Absolute value €807.6m).

The Traditional Manufacturing sector's share of Irish materials has decreased steadily over the period of this time-series from 27% in 2000 to 11% in 2018. (Absolute value €541.2m).

The one sector that has increased its share of Irish materials between 2000 and 2018 is the Medical Devices sector going from 19% to 31% (Absolute value was €915m).

3.11 Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000-2018

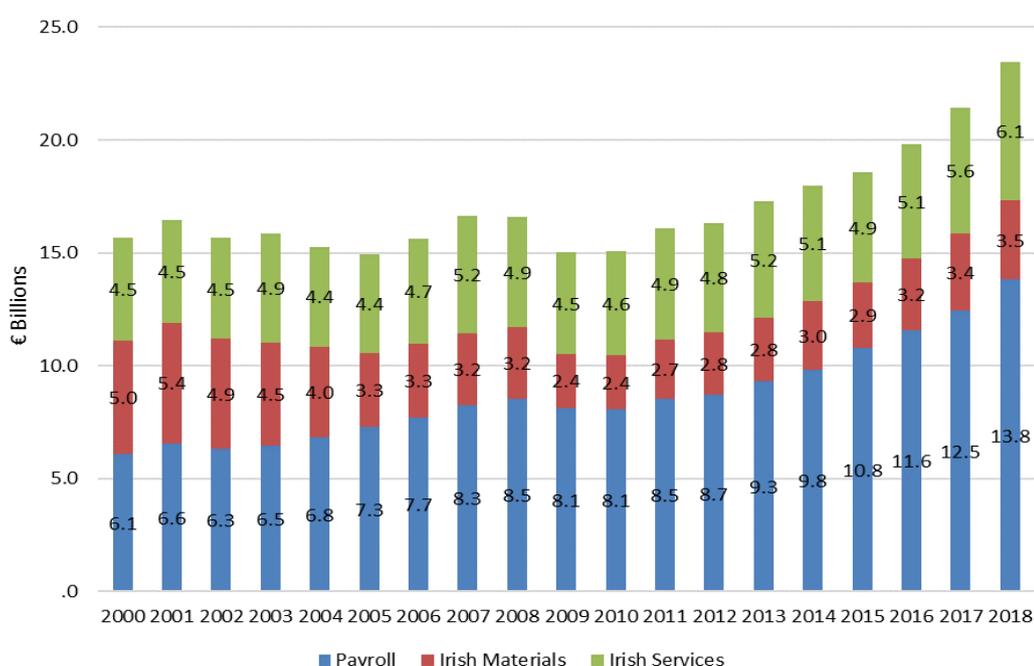


This graph shows the share of total services sourced in Ireland by foreign-owned Manufacturing and Services firms. In 2000, 22% of all services purchased by foreign-owned firms were sourced in Ireland - this figure has declined to 5% in 2018.

- Traditional Manufacturing dropped its share of Irish service purchases from 68% in 2000 to 44% in 2018 but remains the highest performing sector as regards Irish-sourced services. (Absolute value was €353 million).
- The Medical Devices sector's share of services sourced in Ireland dropped from 55% in 2000 to 17% in 2018. (Absolute value was €537 million).

- The Computer, Electronic and Optical Products sector has also decreased its share of Irish services purchases from 45% in 2000 to 10% in 2018. (Absolute value €245 million).
- The Information, Communications and Computer Services sector’s share of service purchases sourced in Ireland fell from 13% in 2000 to 3% in 2018. (Absolute value €2.8 billion).
- The Food & Drink sector declined from the 2000 figure of 41% to 26% in 2018 (Absolute value €555.8 million).
- The percentage of Irish services purchased by the Chemical sector dropped from 14% in 2000 to 5% in 2018. (Absolute value €974 million).

3.12 Total Direct Expenditure in the Irish Economy by Foreign-Owned Companies, 2000-2018



This chart provides trend information on the three components that make up total direct expenditure by foreign-owned companies in the Irish economy.

Direct expenditure by foreign firms in the Irish economy amounted to €23.5 billion in 2018, comprising €13.8 billion on payroll, €3.5 billion on materials produced in Ireland and €6.1 billion on services purchased in Ireland.

- Direct expenditure by foreign-owned firms was up 9.6% in 2018 from €21.4 billion in 2017.
- Direct expenditure has increased from €15.7 billion in 2000 and shows an overall nominal increase of 1.8% per annum between 2000 and 2018.
- Over the period 2000 to 2018:
 - Payroll has increased by 4.1% per annum;

- Expenditure on materials sourced in Ireland has decreased by 2.2% per annum;
- Expenditure on services sourced in Ireland has increased by 1.1% per annum.

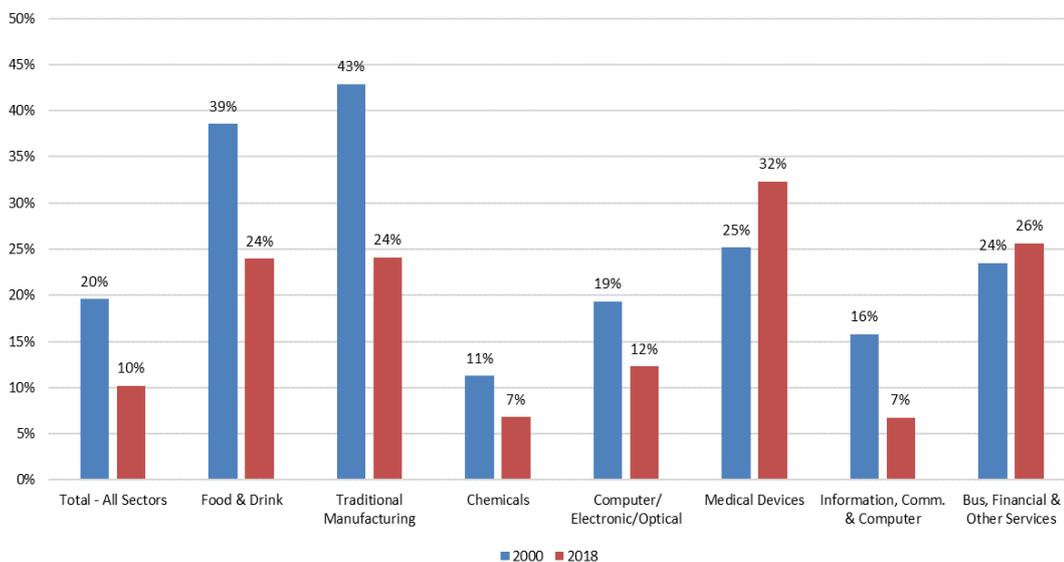
The composition of direct expenditure by foreign companies has also changed since 2000:

- In 2000 payroll made up 39%, Irish materials 32% and Irish services 29% of total Irish economy expenditure;
- In 2018, payroll accounts for 59% of total expenditure in the Irish economy, with Irish materials and Irish services accounting for 15% and 26% respectively.

Calculation – Direct Expenditure in the Irish Economy (DEIE)

DEIE is calculated as the sum of: Payroll + Irish Services + Irish Materials

3.13 Total Direct Expenditure in the Irish Economy as a percentage of Sales in Foreign-Owned Companies, 2000-2018



This graph provides trend information on direct expenditure (payroll, Irish materials, and Irish services) by foreign-owned firms in the Irish economy as a percentage of sales over the period 2000-2018.

For all sectors combined, the results show that direct expenditure in the Irish economy as a percentage of sales has decreased from 20% in 2000 to 10% in 2018.

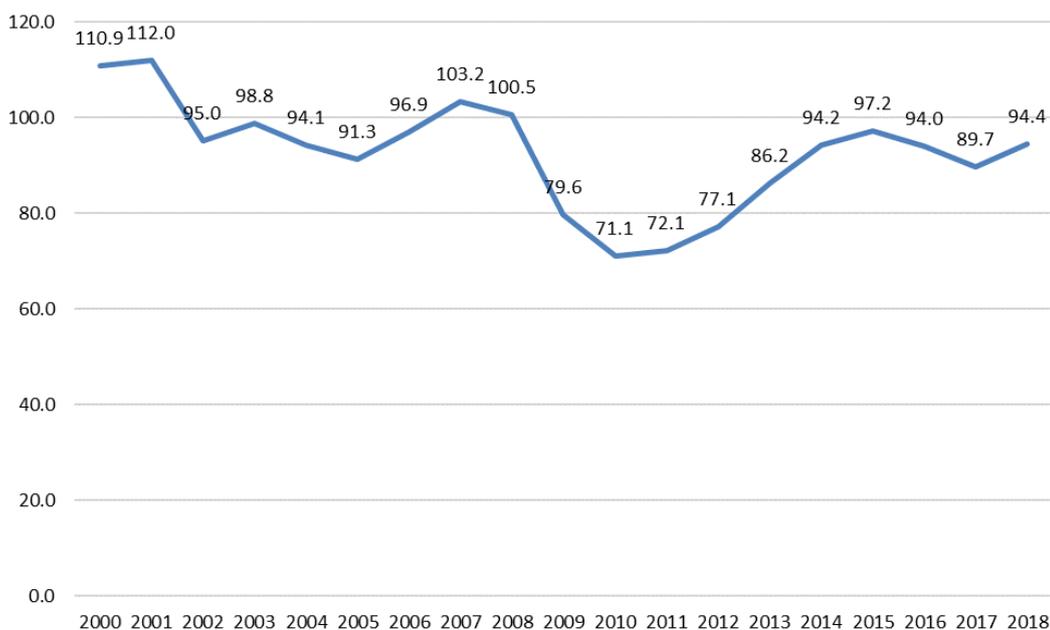
Only two sectors have gone against this aggregate trend – Medical Devices and Business, Financial and Other Services. For Medical Devices DEIE/Sales has increased from 25% in 2000 to 32% in 2018 (Value 3,323m) and for Business, Financial & Other Services it increased from 24% to 26% (Value €2,271m).

The Information, Communication and Computer Services Sector decreased its Direct Expenditure as a percentage of sales from 16% in 2000 to 7% in 2018. In absolute terms this is the sector with the greatest direct expenditure in the Irish economy with a spend of €8.7 billion in 2018 accounting for 37% of total direct expenditure by foreign firms in the economy in 2018.

The next highest contributor in absolute terms is the Chemicals sector with a total expenditure of €3.3 billion in 2018. This represents 8% of sales in that sector in 2018 and is only slightly lower than 2000 when direct expenditure stood at 11% of sales.

Direct Expenditure in Traditional Manufacturing has fallen from 43% in 2000 to 24% in 2018. In absolute terms total expenditure stood at €2.0 billion in 2018.

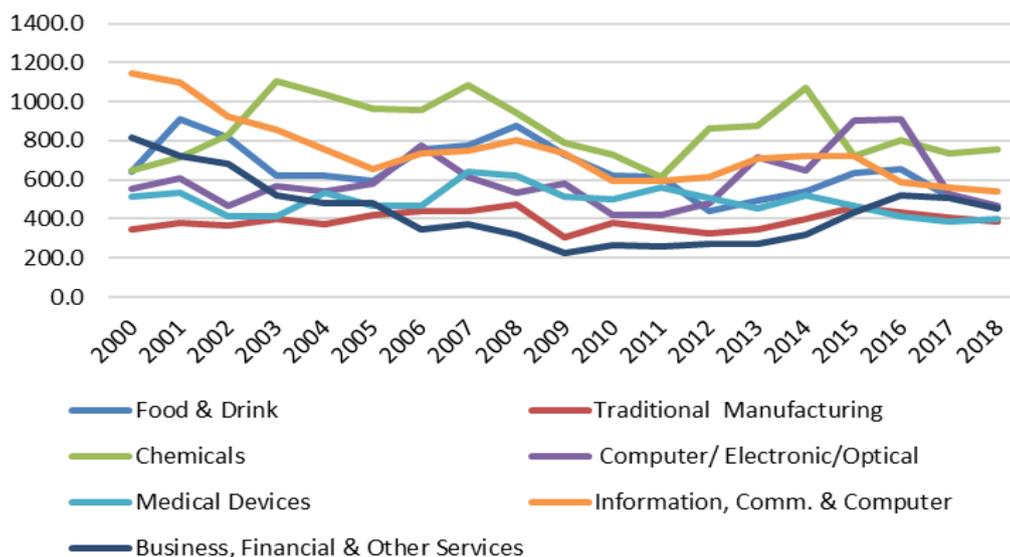
3.14 Formal Structured Training in Foreign-owned Companies, 2000-2018



Total expenditure on structured, formal training in foreign-owned companies in 2018 amounted to €94.4 million. Expenditure on training increased between 2010 and 2015 from a low of €71.0 million in 2010 to reach €96.4 million in 2015. It has since decreased again to €94.4m in 2018.

Spending on training has not recovered to the rates reported in the early years of this survey when total funding for training reached €112.0 million in 2001.

Formal Structured Training per person employed in Foreign-owned Companies by Sector, 2000-2018



- The Manufacturing sectors spent €45.2 million or 47.8% of total expenditure on structured training in foreign-owned companies, broadly equivalent to its share of payroll expenditure of 47.5%.
 - Within Manufacturing, the chemicals sector is responsible for 38.7% of this expenditure in 2018 at €17.5 million.
- The Services sectors spend on training in 2018 was €48.9 million.
 - The IT services sector spends most on training within Services with €38.4m in 2018 or 78.5% of total services spend in that year.
- Overall expenditure on training per person employed in foreign-owned companies declined from €529.6k in 2017 to €511.5k in 2018. Since 2000 expenditure on training per person employed has dropped from €661.8 in 2000 to €511.5 in 2018.
- The sector with the biggest decline in expenditure on training per person employed was IT Services which declined from €1,116.9 in 2000 to €519.6 in 2018, a drop of 53.5%. Business, Financial and Other Services declined from €818.3 in 2000 to 455.3 in 2018, a decline of 44.4%. Food & Drink declined from €643.7 in 2000 to €659.6 in 2018, a decline of 28.6%.

Appendix 1: NACE Codes Used in Report

The classification of economic activity used in the Annual Business Survey of Economic Impact is the European industrial activity classification NACE Rev.2⁶. (Nomenclature statistique des Activités économiques dans la Communauté Européenne)

To highlight broad trends in the report, sectors have been amalgamated into smaller groups⁷.

Irish-owned client companies (Chapter 2) have been grouped by:

Manufacturing and Other Industry

Food/Drink & Primary Production:

- Food & Drink (10-12); agriculture, fishing forestry, mining & quarrying (1-9)

Traditional Manufacturing:

- textiles, clothing, footwear & leather (13-15); wood & wood products (16); paper & printing (17-18), rubber & plastics (22), non-metallic minerals (23), basic & fabricated metal products (24-25), electrical equipment (27), machinery & equipment (28), transport equipment (29-30) and other miscellaneous manufacturing (31-33).

Modern Manufacturing:

- chemicals (19-21), computer, electronic & optical products (26), medical devices (33)

Energy, Water, Waste & Construction

- energy, water, waste & construction (35-43)

Information, Communication & Other Internationally Traded Services (see Appendix 2)

Information, Communication & Computer:

- Publishing, broadcasting & telecommunications (58-61), computer programming (62-6201), consultancy & related facilities (62-6202) and other IT and computer services (6203-63).

Business, Financial & Other Services:

- Financial services (64-66) and business, education & other services (45-56)(68-96)

Foreign-owned client companies (Chapter 3) have been grouped by:

The same groupings are used as with Irish-owned companies, with the exception of Modern Manufacturing where each of the sectors are shown separately i.e. chemicals, computer, electronic & optical products and medical devices.

⁶ NACE Rev 2 – For more detail on NACE codes go to the Central Statistics Office web-site:

⁷ Please note that the ABSEI tracks only Agency client companies' performance and is not meant to be a snapshot of the national economy. In some instances, when analysing sectorial performance, there will be a wide disparity between national (e.g. Central Statistics Office) sectoral data and ABSEI sectoral data because the agency cohort of companies may represent a small proportion of the national sector - the Financial Services sector is an example of this.

Appendix 2: Schedule of Services Industries

S.I. No. 81/2010 - Industrial Development (Service Industries) Order 2010⁸.

This Order sets out those service industries that are eligible for assistance under the Industrial Development Acts, 1986 to 2009:

S.I. No. 81/2010 - Industrial Development (Service Industries) Order 2010
Software development
Data processing and electronic commerce;
Technical and consulting services;
Commercial laboratory services;
Administrative/service centres, co-ordination and headquarters services;
Research and development services;
Media, multimedia and recording services;
Entertainment and leisure services;
Training services;
Publishing services;
International financial services;
Healthcare services;
Construction related services;
Environmental services;
Supply chain management and logistics management services;
Commercial international standards bodies;
Technology test centres;
Prototype laboratory services;
Intellectual property services;
Group procurement;
Shipping services;
Education services.

⁸ <http://www.irishstatutebook.ie/eli/2010/si/81/made/en/print>

Appendix 3: Sample Questionnaires

Enterprise Ireland Questionnaire

For assistance please dial 01-661 2488 or email abr@insightsc.ie

Company name:

Company address:

Annual Business Report 18/19

Conducted by Insight Statistical Consulting on behalf of the Department of Business, Enterprise and Innovation (DBEI)/Enterprise Ireland.



An Roinn Greis, Fostair agus Nuálaíochta
Department of Business, Enterprise and Innovation

Ref no:

Please return a completed form via e-mail to abr@insightsc.ie

All responses to this survey are received on an agreed understanding of confidentiality and commercial sensitivity consistent with our obligations under Irish law. All results will be published in a form that will not identify individual businesses and information. The information is combined with survey information from other state agencies to support DBEI's Business Information System (BIS).

COMPANY	
Person completing form and Job Title:	
E-mail Address and Telephone Number:	
Briefly describe the nature of your business in the Republic of Ireland, including all products/services:	

SALES AND EXPORTS

Q1 - Please record in thousands of Euro (€000's) the total value of your Sales & Exports for each year :

If using accounting year (rather than calendar year) provide date of year-end: _____

	Actual 2017 (€000's)	Actual 2018 (€000's)	Forecast 2019 (€000's)	Forecast 2020 (€000's)
Q1a - DOMESTIC SALES				
Q1a1 - MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2 - SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

Sales of all manufactured goods and services produced in Ireland (excluding VAT and excise duty) by your enterprise for the Domestic market.

Q1b - EXPORT SALES

Q1b1 - MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1b2 - SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

Sales of manufactured goods and services produced by your enterprise for the Export market, i.e. sales to other companies or private individuals not resident in Ireland. For an overseas contract you should include only the value which was returned to Ireland, and exclude the value of materials or labour cost etc. which arose abroad.

Q1c - TOTAL SALES i.e. (Q1a + Q1b)	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
---	------------------------	------------------------	------------------------	------------------------

Total sales of manufactured goods and services produced by your enterprise (Q1a + Q1b).

	2017	2018	2019
Q1d - DOMESTIC SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales in Q1a attributed to the public sector.			
Q1e - DOMESTIC SALES TO FOREIGN OWNED COMPANIES BASED IN IRELAND	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales (Manufactured goods + Services) in Q1a made to foreign owned companies based in the Republic of Ireland.			

Q1f1 - GLOBAL OPERATIONS: Is your company a subsidiary or part of a larger group with a manufacturing and/or other facility outside the Republic of Ireland? Yes No

	Actual 2017	Actual 2018	Forecast 2019
Q1f2 - GLOBAL SALES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

If Yes to Q1f1 above, please indicate the value of total group sales (inclusive of total sales given in Q1c).

Q1f3 - INTER-COMPANY SALES	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
-----------------------------------	------------------------	------------------------	------------------------

If Yes to Q1f1, please state the proportion (best estimate) of the total turnover in Q1c above invoiced to other affiliates or business units of your parent company.

Q1g - DISTRIBUTION SALES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
---------------------------------	------------------------	------------------------	------------------------

In addition to the sales of goods and services produced by your own enterprise (i.e. Q1c) please record the value of goods resold without further processing (i.e. distribution sales or sales of other companies' products).

Q1h - NEW PRODUCT SALES PERCENTAGE (%) IN 2018	<input type="text"/> %
---	------------------------

What proportion of the value of sales in 2018 was accounted for by products which were introduced by the company over the last 3 years, i.e. by products which were substantially different to those previously supplied by your company?

For assistance please dial 01-661 2488 or email abr@insightsc.ie

EXPORT MARKETS

Q2a - Please indicate the year in which you first started to export any product or service:

Q2b - Please provide a breakdown of your exports in 2017, 2018 and your forecasted exports 2019. Please note that the total of these figures should be the same as those outlined in Q1b.

	Actual 2017 (€000's)	Actual 2018 (€000's)	Forecast 2019 (€000's)		Actual 2017 (€000's)	Actual 2018 (€000's)	Forecast 2019 (€000's)
England & Wales				Bahrain			
Northern Ireland				Egypt			
Scotland				Ghana			
UK				Israel			
				Jordan			
Austria				Kenya			
Belgium/Luxembourg				Kuwait			
Bulgaria				Libya			
Croatia				Morocco			
Cyprus				Nigeria			
Czech Republic				Oman			
Denmark				Qatar			
Estonia				Saudi Arabia			
Finland				South Africa			
France				Tunisia			
Germany				UAE			
Greece				M. EAST & AFRICA			
Hungary							
Iceland				Afghanistan			
Italy				Australia			
Latvia				Bangladesh			
Lithuania				China			
Malta				Hong Kong			
Netherlands				India			
Norway				Indonesia			
Poland				Iran			
Portugal				Japan			
Romania				Malaysia			
Russia				Myanmar			
Slovakia				New Zealand			
Slovenia				Pakistan			
Spain				Philippines			
Sweden				Singapore			
Switzerland				South Korea			
Turkey				Taiwan			
Ukraine				Thailand			
EUROPE				Vietnam			
				ASIA			
Argentina				Other Markets - use separate sheet if necessary			
Brazil							
Canada							
Chile							
Colombia							
Mexico							
Peru							
Uruguay							
USA							
Venezuela							
AMERICAS				OTHER MARKETS			
				TOTAL MARKETS			

Q2c - Please specify your top three priority development markets, i.e. by country.

1) 2) 3)

For assistance please dial 01-661 2488 or email abr@insightsc.ie

Q2d - Please list the markets where you had a **physical presence in 2018** (i.e. an office or staff permanently located there)

Q2e - EXPORT CHANNELS: Do you use **distributors** or **partners** overseas as a channel for export sales? Yes
No

Q2f - EXPORT SALES FROM DISTRIBUTORS AND PARTNERS (%) IN 2018 %

If Yes, please estimate the proportion of total export sales (Q1b) from distributors and partners in 2018.

EMPLOYMENT

Q3a - COMPANY STAFF
Company employees working in the Republic of Ireland @ 31st December. Normally these employees are paid through the company payroll.

	Actual 2017	Actual 2018	Forecast 2019
Full-Time: <i>Employed on a full-time basis for at least nine months with the exception of agency workers (see Q3b)</i>			
Other: <i>All other employees with the exception of agency workers (see Q3b), can be part-time, short-term, temporary or other.</i>			
TOTAL COMPANY STAFF			

Q3b - AGENCY STAFF
In addition to company staff in Q3a, please indicate the number of agency staff in Republic of Ireland @ 31st December. An agency worker is a person who is supplied by an employment agency to carry out work for another business under contract. Normally their salary is paid directly by the employment agency.

	Actual 2017	Actual 2018	Forecast 2019
Full-Time: <i>Employed on a full-time basis for at least nine months</i>			
Other: <i>All other classification of agency worker, can be part-time, short-term, temporary or other.</i>			
TOTAL AGENCY STAFF			

Q3c - GLOBAL EMPLOYMENT [IRELAND AND OVERSEAS]
If Yes to Q1f1, please indicate the number of full-time employees in your global operation (including Irish entity) @ 31st December.

	Actual 2017	Actual 2018	Forecast 2019
Full-Time Employees Only:			

EXPENDITURE ITEMS

Q4 - PAYROLL Actual 2017 (€000's) Actual 2018 (€000's)
Wages, salaries, pensions and other payroll costs for company staff (See total company staff above) within the Republic of Ireland [include all bonuses, PRSI, other taxes and levies but exclude redundancy payments].

For assistance please dial 01-661 2488 or email abr@insightsc.ie

Please record in Q5 to Q7 the costs associated with total sales **excluding cost of distribution sales (Q1g)**.

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q5a - MATERIALS	€ <input type="text"/>	€ <input type="text"/>

Cost of materials and components used directly in the production of goods and services [exclude goods purchased for re-distribution only or any capital expenditure and include material-based RD&I costs]

Q5b - MATERIALS SOURCED IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
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Estimated proportion of materials and components in Q5a produced in Republic of Ireland.

Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)	<input type="text"/> %	<input type="text"/> %
--	------------------------	------------------------

Estimated proportion of materials and components in Q5a sourced in the UK

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q6a - SERVICES	€ <input type="text"/>	€ <input type="text"/>

Cost of all bought-in services, e.g. agency fees, professional fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services etc.

Q6b - SERVICES SOURCED IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
--	------------------------	------------------------

Estimated proportion of services in Q6a sourced in Republic of Ireland.

Q6c - ENERGY	€ <input type="text"/>	€ <input type="text"/>
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Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.

Q7a - ROYALTIES	€ <input type="text"/>	€ <input type="text"/>
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Estimated value of royalty payments, i.e. include international payments of franchising fees and the royalties paid for the use of registered trademarks, use of intangible, non-produced, non-financial assets and proprietary rights (such as patents, copyrights and industrial processes and designs) and with the use, through licensing agreements, of produced originals or prototypes (such as manuscripts, and cinematographic works and sound recordings).

Q7b - ROYALTIES PAID IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
--	------------------------	------------------------

Estimated proportion of royalties in Q7a paid to companies located in Republic of Ireland (whether inter-company or otherwise).

Q8 - ALL OTHER EXPENSE ITEMS	€ <input type="text"/>	€ <input type="text"/>
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Sum of all other expense items appearing in Profit and Loss Account of your Republic of Ireland operation (e.g. rent, leasing costs, interest payments and depreciation).

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q9a - GROSS PROFIT - As per your Profit and Loss Account	€ <input type="text"/>	€ <input type="text"/>
Q9b - NET PROFIT BEFORE TAX - As per your Profit & Loss Account	€ <input type="text"/>	€ <input type="text"/>

C O R P O R A T I O N T A X

Q10 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2017-2020?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2017 (actual)			
2018 (estimate)			
2019 (forecast)			
2020 (forecast)			

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TRAINING

Please estimate your organisation's expenditure on **formal, structured training** to management and staff (in-house and off-site).

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q11 - TRAINING	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all formal structured training, in-house and external (excluding salary of those being trained, on-the-job training costs and apprentice training).</i>		

RESEARCH, DEVELOPMENT & INNOVATION

Research, Development and Innovation (RD&I) is creative work undertaken on a systematic basis using scientific and technological means to create new and improved products, processes, services and other applications. The basic criterion for distinguishing RD&I from related activities is the presence of an appreciable element of novelty and by the resolution of problems and uncertainties using scientific or technological means. Essentially these are problems where solutions are not readily apparent to someone already familiar with the stock of knowledge and techniques for the area concerned. For examples of RD&I costs, please follow the link <http://insightsc.ie/download/1865/>

	Actual 2017	Actual 2018
Q12a - IN-HOUSE RD&I (NUMBER EMPLOYED)	<input type="text"/>	<input type="text"/>
<i>Number of people employed (full time equivalent) on in-house RD&I within your Republic of Ireland operation.</i>		
	(€000's)	(€000's)
Q12b - RD&I EXPENDITURE (IN-HOUSE)	€ <input type="text"/>	€ <input type="text"/>
<i>Please estimate the total expenditure by your Republic of Ireland operation on in-house RD&I, including the payroll cost of people employed on in-house RD&I.</i>		
Q12c - RD&I EXPENDITURE (OUTSOURCED)	€ <input type="text"/>	€ <input type="text"/>
<i>Please estimate the total expenditure incurred by your Republic of Ireland operation on RD&I sub-contracted to other parties</i>		
Q12d - OVERALL RD&I EXPENDITURE	€ <input type="text"/>	€ <input type="text"/>
<i>Please combine Q12b and Q12c</i>		
Q12e - PERCENTAGE OF GLOBAL RD&I	<input type="text"/> %	<input type="text"/> %
<i>If Yes to Q1f1, what proportion (%) of your global RD&I expenditure does your RD&I expenditure from Ireland (as outlined in Q12d above) represent?</i>		

Q12f - RD&I TAX CREDITS

Please indicate whether your organisation has availed (or will avail) of the RD&I tax credit in the following years:

	2016	2017	2018
Yes	<input type="text"/>	<input type="text"/>	<input type="text"/>
No	<input type="text"/>	<input type="text"/>	<input type="text"/>

Q12g - INTELLECTUAL PROPERTY

Please indicate whether your institution holds any of the following intellectual property (please tick all that apply):

- a- Patent(s) within the last 20 years
- b- Registered design(s)
- c- Registered trademark(s)
- d- Trade secret(s)
- e- Web Presence/Website name(s)
- f- Licensed intellectual property from a third party
- g- Copyright
- h- Don't know
- i- None of the above

Q12h - IRISH KNOWLEDGE DEVELOPMENT BOX

The Knowledge Development Box (KDB) was introduced by Finance Act 2015 for companies whose accounting period commences on or after 1 January 2016. Please indicate whether you have applied to the Irish Knowledge Development Box to date:

- Have applied
- Will apply
- Not relevant to my business

IDA Ireland Questionnaire

For assistance please dial +353 1 6612467 or email abr@insightsc.ie

Company name:

Annual Business Report 18/19



Company address:

Conducted by Insight Statistical Consulting on behalf of the Department of Business, Enterprise and Innovation (DBEI)/IDA Ireland.



Ref no:

Please return a completed form via e-mail to abr@insightsc.ie

All responses to this survey are received on an agreed understanding of confidentiality and commercial sensitivity consistent with our obligations under Irish law. All results will be published in a form that will not identify individual businesses and information. The information is combined with survey information from other state agencies to support DBEI's Business Information System (BIS).

COMPANY	
CRO Number:	
Person completing form and Job Title:	
E-mail Address and Telephone Number:	
Please provide the Nace classification of your business and briefly describe the nature of your operations in the Republic of Ireland, including all products/services:	

SALES AND EXPORTS

Q1 - Please record in thousands of Euro the total value of your Sales & Exports for each year :

If using accounting year (rather than calendar year) provide date of year-end: _____

	Actual 2017 (€000's)	Actual 2018 (€000's)	Forecast 2019 (€000's)
EXPORT SALES			
Q1a1) MANUFACTURED GOODS	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>
Q1a2) SERVICES	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>

Sales of manufactured goods produced and services provided by your enterprise for the Export market, i.e. the value excluding excise duties and VAT. For an overseas contract you should include only the value which was returned to Ireland, and exclude the value of materials or labour cost etc. which arose abroad. Distribution sales should be excluded and provided in Q1g below. Additional guidance notes for service-based organisations are available.

DOMESTIC SALES

Q1b1) MANUFACTURED GOODS	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>
Q1b2) SERVICES	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>

Sales of manufactured goods produced and services provided by your enterprise for the Domestic (Republic of Ireland) market, i.e. the value excluding excise duties and VAT. Distribution sales should be excluded and provided in Q1f below. For a service-type activity such as a call centre, please include the fee income earned by the Republic of Ireland operation rather than the value of all the transactions handled by the call centre.

Q1c - TOTAL SALES i.e. (Q1a + Q1b)	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>
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Total sales of manufactured goods and services produced by your enterprise (Q1a + Q1b).

SALES TO PUBLIC SECTOR

Q1d1 - EXPORT SALES TO PUBLIC SECTOR	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
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Estimated percentage of export sales in Q1a attributed to the public sector.

Q1d2 - DOMESTIC SALES TO PUBLIC SECTOR	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
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Estimated percentage of domestic sales in Q1b attributed to the public sector.

Q1e - INTER-COMPANY SALES	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
----------------------------------	--	--	--

Of the total turnover in Q1c above, please state the proportion (best estimate) invoiced to other affiliates or business units of your parent company.

Q1f - GLOBAL SALES	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
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What proportion of your parent company's global sales does your Irish business represent? (i.e. total Irish sales as outlined in Q1c divided by your parent company's reported turnover).

Q1g - DISTRIBUTION SALES	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>
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In addition to the goods produced and services provided by your own enterprise (Q1c) please record the value of goods resold without further processing (i.e. distribution sales or sales of other companies' products).

Please ensure that all monetary amounts are in thousands

For assistance please dial +353 1 6612467 or email abr@insightsc.ie

EXPORT MARKETS

Q2 - EXPORT MARKETS i.e. breakdown of Q1a into specific markets

Please indicate the final destination market (rather than central distribution centre) if known:

	2017		2018	
	Goods	Services	Goods	Services
United Kingdom (inc. Northern Ireland)	%	%	%	%
Other EU Countries*	%	%	%	%
Other European Countries	%	%	%	%
North America, i.e. USA and Canada	%	%	%	%
Asia	%	%	%	%
Elsewhere	%	%	%	%
Total	100%	100%	100%	100%

* Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and Sweden.

EMPLOYMENT

Q3a - COMPANY STAFF

Company employees working in the Republic of Ireland @ 31st December. Normally these employees are paid through the company payroll.

	Actual 2017	Actual 2018	Forecast 2019
Full-Time: Employed on a full-time basis (or on a contract of at least nine months) with the exception of agency workers.			
Other: All other employees with the exception of agency workers, can be part-time, short-term, temporary or other.			
TOTAL COMPANY STAFF			
% Company Staff Earning €40,000+ per annum	%	%	%

Q3b - AGENCY STAFF

In addition to company staff in Q3a, please indicate the number of agency staff in Republic of Ireland @ 31st December. An agency worker is a person who is supplied by an employment agency to carry out work for another business under contract. Normally their salary is paid directly by the employment agency.

	Actual 2017	Actual 2018	Forecast 2019
Full-Time: Employed as an agency worker on a full-time basis (or on a contract of at least nine months).			
Other: All other classification of agency worker, can be part-time, short-term, temporary or other.			
TOTAL AGENCY STAFF			
Q3c - GLOBAL EMPLOYMENT			

If your company is a subsidiary or part of a larger group with a manufacturing and/or other facility outside the Republic of Ireland, please indicate the number of full-time employees in your global operation (including Irish entity) @ 31st December.

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CURRENT EXPENDITURE

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q4 - PAYROLL	€ <input type="text"/>	€ <input type="text"/>
<i>Wages, salaries, pensions and other payroll costs for employees within the Republic of Ireland [include all bonuses, PRSI, other taxes and levies but exclude redundancy payments and agency staff payroll costs].</i>		
Please record costs associated with total sales excluding cost of distribution sales (Q1f) .		
Q5a - MATERIALS	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of materials and components used directly in the production of goods and services [exclude goods purchased for re-distribution only or any capital expenditure].</i>		
Q5b - MATERIALS SOURCED IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of materials and components in Q5a produced in Republic of Ireland.</i>		
Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of materials and components in Q5a sourced in the UK</i>		
Q6a - SERVICES not including Royalties	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all bought-in services, e.g. agency fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services, professional fees etc.</i>		
Q6b - SERVICES SOURCED IN IRELAND not including Royalties (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of services in Q6a sourced in Republic of Ireland.</i>		
Q6c - ENERGY	€ <input type="text"/>	€ <input type="text"/>
<i>Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.</i>		
Q7a - ROYALTIES not to be included in Q6a-Services above	€ <input type="text"/>	€ <input type="text"/>
<i>Estimated value of royalty payments, i.e. include international payments of franchising fees and the royalties paid for the use of registered trademarks, use of intangible, non-produced, non-financial assets and proprietary rights (such as patents, copyrights and industrial processes and designs) and with the use, through licensing agreements, of produced originals or prototypes (such as manuscripts, and cinematographic works and sound recordings).</i>		
Q7b - ROYALTIES PAID IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of royalties in Q7a paid to companies located in Republic of Ireland (whether inter-company or otherwise)</i>		
Q8 - ALL OTHER EXPENSE ITEMS	€ <input type="text"/>	€ <input type="text"/>
<i>Sum of all other expense items appearing in Profit and Loss Account of your Republic of Ireland operation (e.g. rent, leasing costs, interest payments, depreciation and foreign exchange costs etc.).</i>		

TRAINING

Please estimate your organisation's expenditure on **formal, structured training** to management and staff (in-house and off-site).

	Actual 2017	Actual 2018
Q9 - TRAINING	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all formal structured training, in-house and external (excluding salary of those being trained, on-the-job training costs and apprentice training).</i>		

CAPITAL EXPENDITURE

	Actual 2017 (€000's)	Actual 2018 (€000's)
Q10 - CAPITAL EXPENDITURE	€ <input type="text"/>	€ <input type="text"/>
<i>Please outline the cost of any expenditure on fixed assets (i.e. assets with a useful life extending beyond the taxable year) associated with the companies operation in the Republic of Ireland. You should include in the appropriate category leased items of fixed capital where the lease is on a financial basis, exclude operational leases.</i>		
Please estimate how Capital Expenditure was distributed across the following categories:		

	2017	2018
Building & Structures	<input type="text"/> %	<input type="text"/> %
Machinery & Equipment	<input type="text"/> %	<input type="text"/> %
Other	<input type="text"/> %	<input type="text"/> %
Total	100%	100%

CORPORATION TAX

Q11 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2017-2020?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2017 (actual)	<input type="text"/>	<input type="text"/>	<input type="text"/>
2018 (estimate)	<input type="text"/>	<input type="text"/>	<input type="text"/>
2019 (forecast)	<input type="text"/>	<input type="text"/>	<input type="text"/>
2020 (forecast)	<input type="text"/>	<input type="text"/>	<input type="text"/>

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RESEARCH, DEVELOPMENT & INNOVATION

Research, Development and Innovation (RD&I) is creative work undertaken on a systematic basis using scientific and technological means to create new and improved products, processes, services and other applications. The basic criterion for distinguishing RD&I from related activities is the presence of an appreciable element of novelty and by the resolution of problems and uncertainties using scientific or technological means. Essentially these are problems where solutions are not readily apparent to someone already familiar with the stock of knowledge and techniques for the area concerned. For examples of RD&I costs, please follow the link <https://eu.workplace.datto.com/filelink/3c3fa-383d6d25-3990f9a83a-2>

Q12a - IN-HOUSE RD&I EMPLOYMENT	Actual 2017	Actual 2018
Q12a1 - RESEARCHERS/TECHNICIANS	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<i>Number of researchers/technicians employed (full time equivalent) on RD&I within your Republic of Ireland operation.</i>		
Q12a2 - SUPPORT STAFF	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
<i>Number of support staff employed (full time equivalent) on RD&I within your Republic of Ireland operation.</i>		
Q12b - RD&I EXPENDITURE (IN-HOUSE)	€ <input style="width: 100%;" type="text"/> (€000's)	€ <input style="width: 100%;" type="text"/> (€000's)
<i>Please estimate the total expenditure by your Republic of Ireland operation on in-house RD&I, including the payroll cost of people employed on in-house RD&I. The RD&I costs should also appear in the relevant sections of expenditure items in this review, i.e. Q4-Q9.</i>		
Q12c - RD&I EXPENDITURE (OUTSOURCED)	€ <input style="width: 100%;" type="text"/>	€ <input style="width: 100%;" type="text"/>
<i>Please estimate the total expenditure incurred by your Republic of Ireland operation on RD&I sub-contracted to other parties. The RD&I costs should also appear in the relevant sections of expenditure items in this review, i.e. Q4-Q9.</i>		
Q12d - OVERALL RD&I EXPENDITURE	€ <input style="width: 100%;" type="text"/>	€ <input style="width: 100%;" type="text"/>
<i>Please estimate the total expenditure on RD&I, i.e. Q12b plus Q12c</i>		
Q12e - PERCENTAGE OF GLOBAL RD&I	<input style="width: 100%;" type="text"/> %	<input style="width: 100%;" type="text"/> %
<i>If your company is part of a larger group with a manufacturing and/or other facility OUTSIDE the Republic of Ireland, i.e. global sales at Q1f, what proportion (%) of your global RD&I expenditure does your RD&I expenditure from Ireland (as outlined in Q12d above) represent?</i>		

Q12f - RD&I TAX CREDITS

Please indicate whether your organisation has availed (or will avail) of the RD&I tax credit in the following years:

	2016	2017	2018
Yes	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
No	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX

The Knowledge Development Box (KDB) was introduced by Finance Act 2015 for companies whose accounting period commences on or after 1 January 2016. It is a regime for the taxation of income which arises from patents, copyrighted software and, in relation to smaller companies, other intellectual property that is similar to an invention which could be patented. The regime is only available to companies that carried out the research and development (R&D), within the meaning of section 766 Taxes Consolidation Act 1997 (TCA 1997), which led to the creation of the patent, copyrighted software or intellectual property (IP) equivalent to a patentable invention. A company which qualifies for the regime will be entitled to a deduction equal to 50% of its qualifying profits in computing the profits of its specified trade. In effect, the profits arising from patents, copyrighted software or IP equivalent to a patentable invention are taxed at 6.25%.

Please indicate whether you have applied to the Irish Knowledge Development Box to date:

<input style="width: 100%;" type="checkbox"/>	Have applied
<input style="width: 100%;" type="checkbox"/>	Will apply
<input style="width: 100%;" type="checkbox"/>	Not relevant to my business

For assistance please dial +353 1 6612467 or email abr@insightsc.ie

Q12h - INTELLECTUAL PROPERTY

Please indicate whether your institution holds any of the following intellectual property (please tick all that apply):

- a- Patent(s)
- b- Registered design(s)
- c- Registered trademark(s)
- d- Trade secret(s)
- e- Web domain name(s)
- f- Licensed intellectual property from a third party
- g- Copyright
- h- Don't know
- i- None of the above

Q12i1 - RELATIONSHIP WITH HIGHER EDUCATION:

Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2018?

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Don't Know	<input type="checkbox"/>

Q12i2 - If Yes to Q12i1, please name the higher education institution (s):

RESEARCH PRIORITISATION

Q13 - The Government has identified 14 Priority Areas for future public investment in research. Based on the business in which you operate, please indicate the relevance of each of the Priority Areas by ticking the appropriate box on each item based on the following scale:

- 1 = No relevance
- 2 = Directly relevant to business
- 3 = Relevant to business and actively engaged in research in the area

	1	2	3	
a-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Future Networks & Communications
b-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security & Privacy
c-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content & Applications
d-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connected Health and Independent Living
e-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Devices
f-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagnostics
g-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Therapeutics: Synthesis, Formulation, Processing and Drug Delivery
h-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food for Health
i-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Food Production and Processing
j-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marine Renewable Energy
k-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smart Grids & Smart Cities
l-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Competitiveness
m-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Processing Technologies and Novel Materials
n-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Innovation in Services and Business Processes

Further Information on the Priority Areas is available at <https://eu.workplace.datto.com/filelink/3c3fa-383bce08-48db9ff8a2-2>

IMPACT OF BREXIT

The UK vote to leave the European Union raises many important issues for Ireland's exporters to Britain. Please outline how it will impact your company in the next year, and your plans (if any).

Q14a - Has Brexit negatively impacted your business?

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

