



Rialtas na hÉireann
Government of Ireland

Annual Business Survey of Economic Impact (ABSEI) 2019

Prepared by the Department of Enterprise, Trade and Employment

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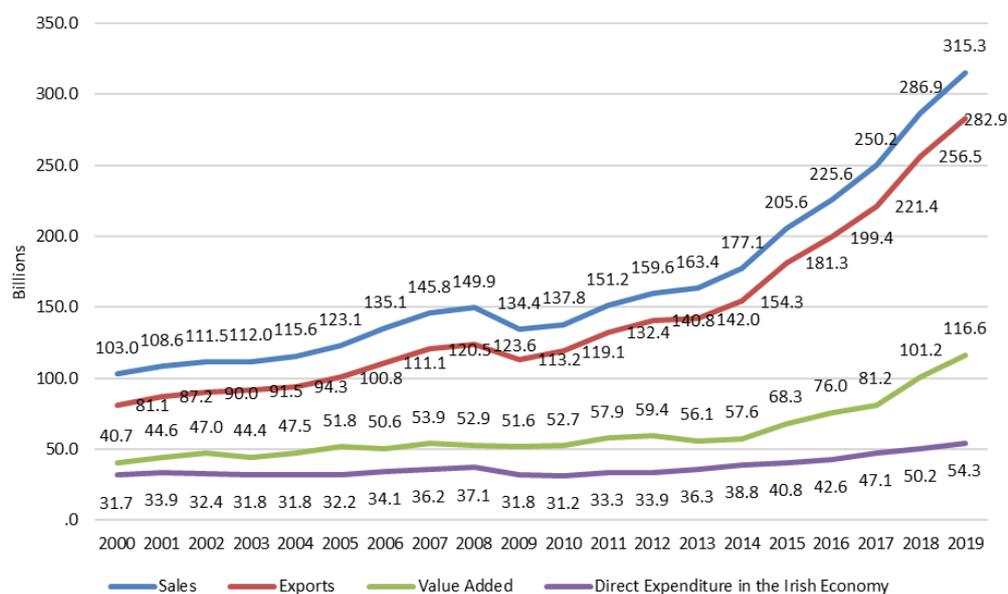
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Executive Summary

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), 2000-2019



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 2019.

Agency client companies reported a rise in sales and exports in 2019 over the previous year. This continues a substantial upward trend in results following the downturn in the economy in 2008.

- Total sales amounted to €315.3 billion in 2019 which represents an increase of 9.9% in current prices on the previous year’s figure of €286.9 billion.
- Total exports in 2019 amounted to €282.9 billion, an increase of 10.4% on the previous year of €256.5 billion.
- Value added (sales less materials and services costs) has also increased over this time-series and in 2019 amounted to €116.1 billion, up 15.2% on the previous year with 87.0% of this increase attributable to the foreign owned IT services sector.

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.

- Direct Expenditure in the Irish Economy (Payroll, Irish Materials, Irish Services) has increased over 2018 by 8.0% to €54.3 billion in 2019.

E.2 Summary Table of Key Business Indicators (current prices), 2019

	2019 (€bn)			Share of Total 2019		
	Foreign-owned	Irish-Owned	All	Foreign-owned	Irish-Owned	All
Sales	269.5	45.9	315.3	85%	15%	100%
Exports	258.5	24.4	282.9	91%	9%	100%
Value Added	99.9	16.7	116.6	86%	14%	100%
Direct Expenditure	27.3	26.9	54.2	51%	49%	100%

Note: Rounding may affect totals

This table shows sales, exports, value added and direct expenditure for 2019 by ownership.

- Total sales for agency-assisted companies in 2019 amounted to €315.3 billion.
 - Foreign-owned companies account for €269.5 billion, an increase of 9.9% over the previous year. This represents 85% of total sales by Agency clients in 2019.
 - Sales for Irish-owned firms increased by 6.3% between 2018 and 2019, amounting to €45.9 billion or 15% of total sales.
- Total exports for agency clients amounted to €282.9 billion in 2019, a 10.4% increase over 2018 exports, with €258.5 billion exports by Foreign-owned companies and €24.4 billion exports by Irish-owned companies in 2019.
- Value added was €116.6 billion in 2019 with 86% of this value being generated in foreign owned firms.
- Irish owned client companies have €26.9 billion of direct expenditure in the Irish economy compared with €27.3 billion for foreign owned companies.

E.3 Export Intensity of Irish and Foreign-owned Companies, 2000-2019

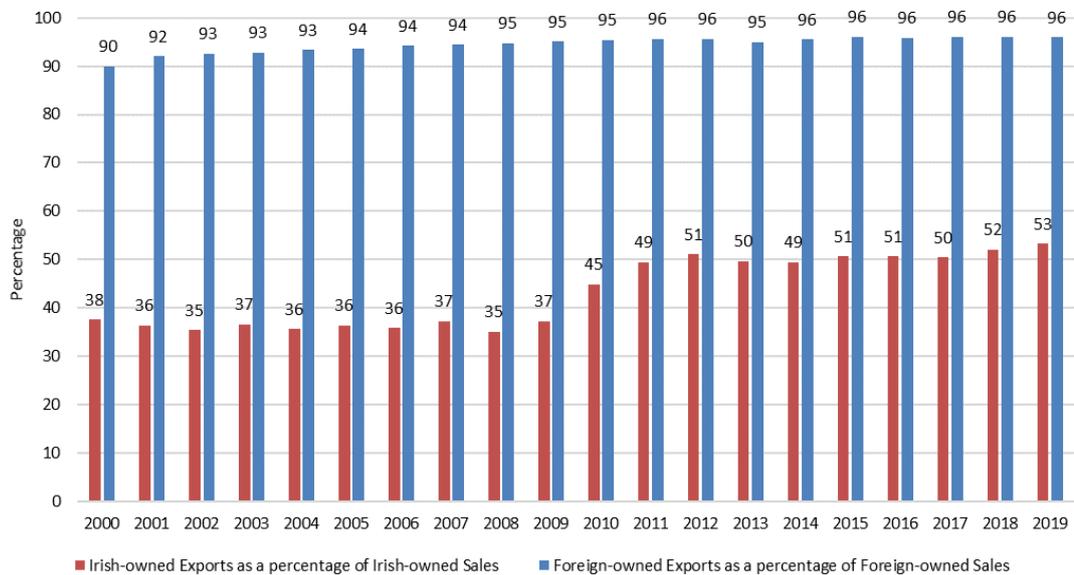
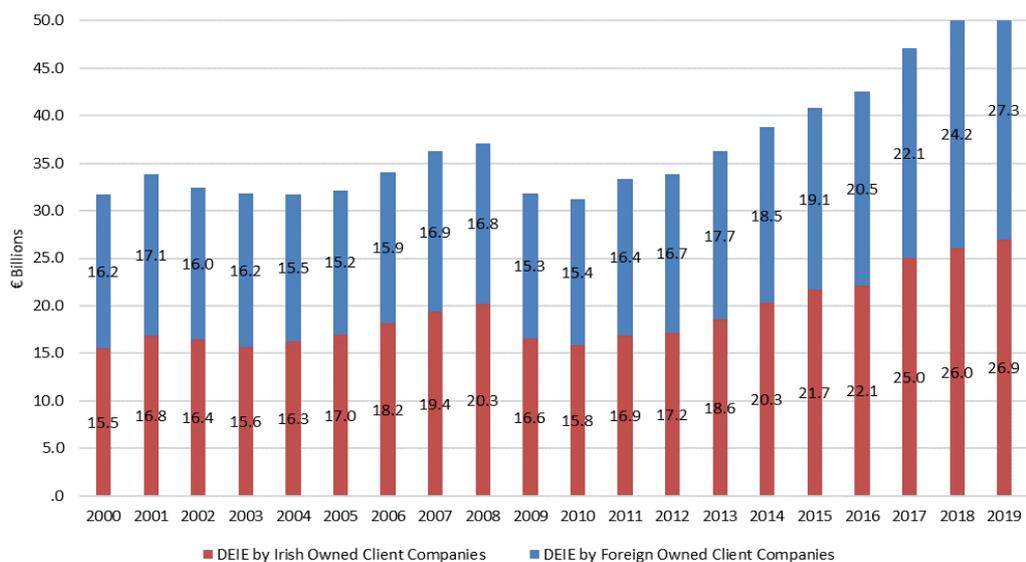


Figure E.3 above illustrates the export intensity (exports as a percentage of total sales) of Irish-owned and Foreign-owned firms over the period 2000 to 2019.

- Irish-owned firms have increased their export intensity from 38% in 2000 to a steady 50-53% 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 2019, at this constant level since 2014.

E.4 Direct Expenditure in the Irish Economy (DEIE) by Ownership, 2000-2019



In 2019, Direct Expenditure in the Irish Economy (DEIE) by agency-assisted firms amounted to €54.2 billion and is the highest level of direct expenditure in the twenty years of this time-series.

Irish-owned client companies spent approximately €26.9 billion in the Irish economy in terms of payroll and purchases of Irish materials and Irish services. Foreign owned clients spent €27.3 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, 2000-2019



In 2019, there was an increase in payroll and purchases of Irish materials and services over the 2018 figures. There was an increase in the purchases of Irish materials of 1.6% and Irish services of 14.8% and of payroll payments of 8.8%.

E.6 Direct Expenditure as Percentage of GNP² in Irish/foreign-owned companies, 2000, 2010 and 2019

	Irish			Foreign		
	2000	2010	2019	2000	2010	2019
All Sectors	16.7%	11.4%	9.8%	17.4%	11.0%	10.0%
Manufacturing & Other Industry	14.8%	9.3%	7.9%	12.3%	7.0%	4.9%
Infor., Comm. & Other Services	1.9%	2.1%	1.9%	5.1%	4.0%	5.1%

² Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2010 = €140.6bn / 2019 = €274bn.

Source: CSO, Database: N1924 Gross national product at current market prices.

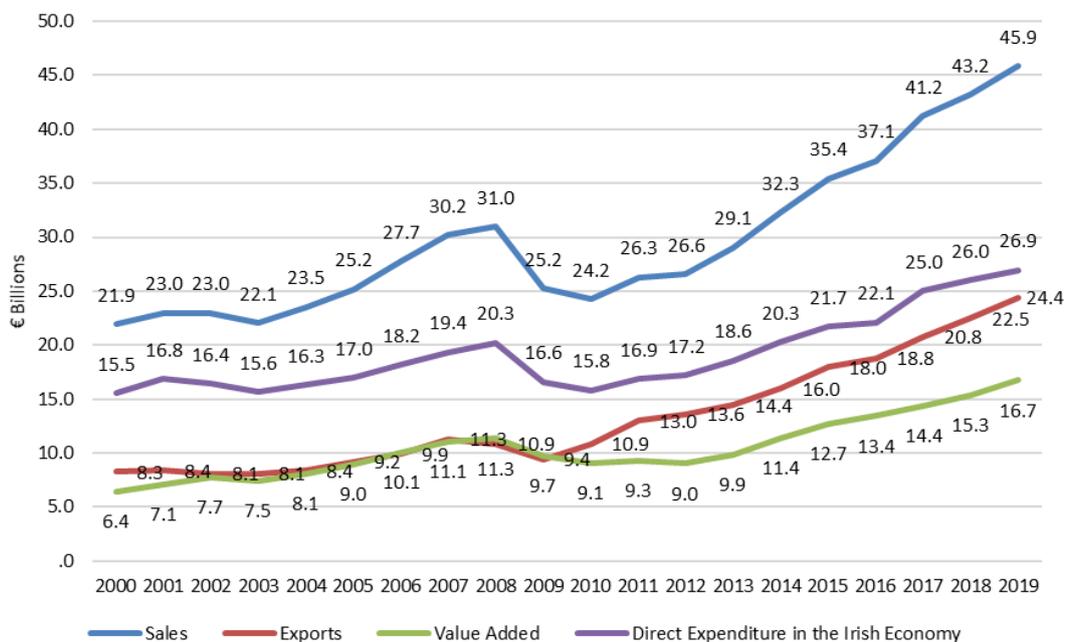
- In 2019, the Direct Expenditure (payroll and purchases of Irish materials & services) of Irish-owned firms in the Irish economy amounted to 9.8% of Ireland’s Gross National Product (GNP). In 2000, this figure was 16.7% and 11.4% in 2010, as growth in direct expenditure did not keep pace with growth in GNP.
 - Direct Expenditure of the Irish-owned Manufacturing sectors as a percentage of GNP reduced from 14.8% to 9.3% between 2000 and 2010 and decreasing in 2019 to 7.9%. The Services sectors has remained static at 1.9% of GNP in both 2000 and 2019.
- Direct Expenditure by foreign-owned firms as a percentage of GNP stands at 10.0% in 2019 down from 17.4% in 2000.
 - Direct Expenditure as a percentage of GNP in the foreign-owned Information, Communication & Internationally-Traded Services sectors at 5.1% in 2000. In 2010 it decreased to 4.0% before returning to 5.1% in 2019. The manufacturing sectors have decreased their share from 12.3% in 2000 to 4.9% in 2019.

E.7 Value Added as percentage of GNP in Irish/foreign-owned companies, 2000, 2010 and 2019

	Irish			Foreign		
	2000	2010	2019	2000	2010	2019
All	6.9%	6.5%	6.1%	36.8%	31.3%	36.4%
Manufacturing & Other Industry	5.0%	3.7%	3.7%	26.2%	21.7%	18.4%
Infor., Comm. & Other Services	1.9%	2.8%	2.4%	10.7%	9.6%	18.0%

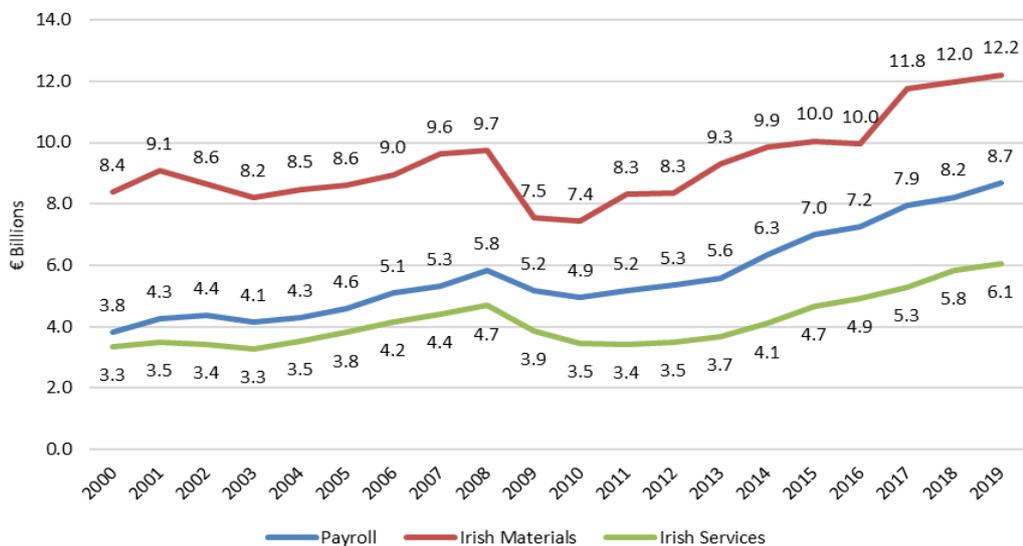
- Value added (sales less the cost of materials and services) in Irish owned companies has decreased as a percentage of GNP from 6.9% in 2000 to 6.1% in 2019.
 - While the manufacturing sectors have seen value added decreased between 2000 and 2019 from 5.0% to 3.7%, the services sectors have increased their percentage share of GNP from 1.9% in 2000 to 2.4% in 2019.
- For foreign-owned companies, value added as a percentage of GNP decreased from 36.8% in 2000 to 31.3% in 2010 before increasing to 36.4% in 2019.
 - The Services sectors have increased value added from their 2000 level of 10.7% of GNP to 18.0% of GNP in 2019.
 - The Manufacturing sectors have decreased value added as a percentage of GNP from 26.2% in 2000 to 18.4% in 2019.

E.8 Key Business Indicators for Irish-Owned Companies, 2000-2019 (current prices)



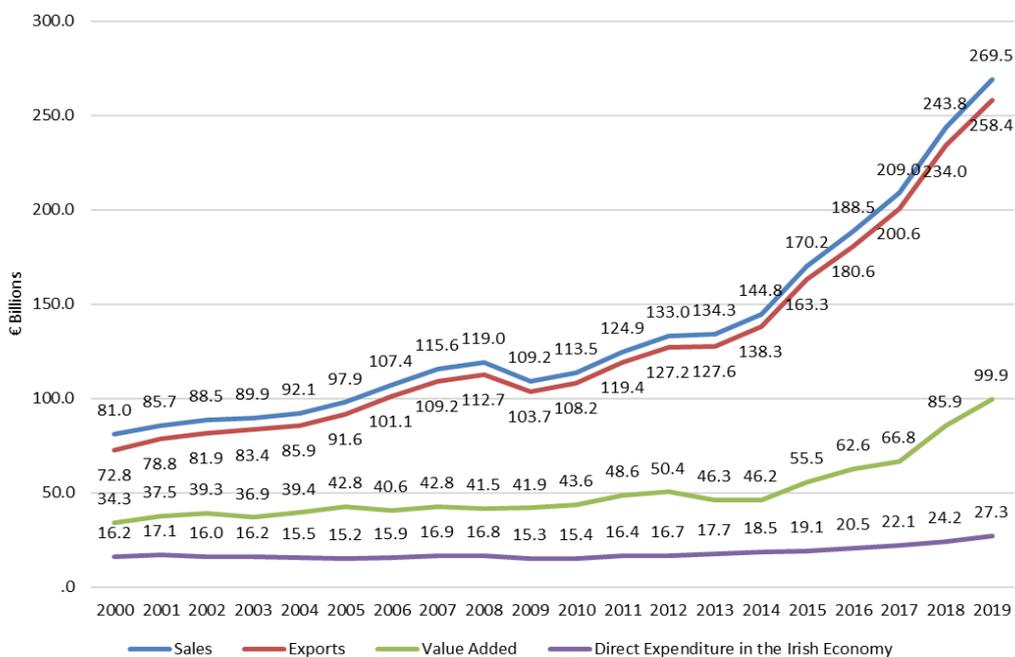
- Sales by Irish owned firms in 2019 showed an increase of 6.3% on the previous year. Total sales stood at €45.9 billion in 2019.
- Exports were also significantly up for Irish firms in 2019 over 2018 with growth of 9.5% and amounted to €24.4 billion in 2019.
- Value-added and direct expenditure have also continued their upward trend with value added at €16.7 billion (up 9.2%) and direct expenditure reaching €26.9 billion (up 3.5%) in 2019.

E.9 Direct Expenditure in the Irish Economy for Irish-owned client's companies, 2000-2019



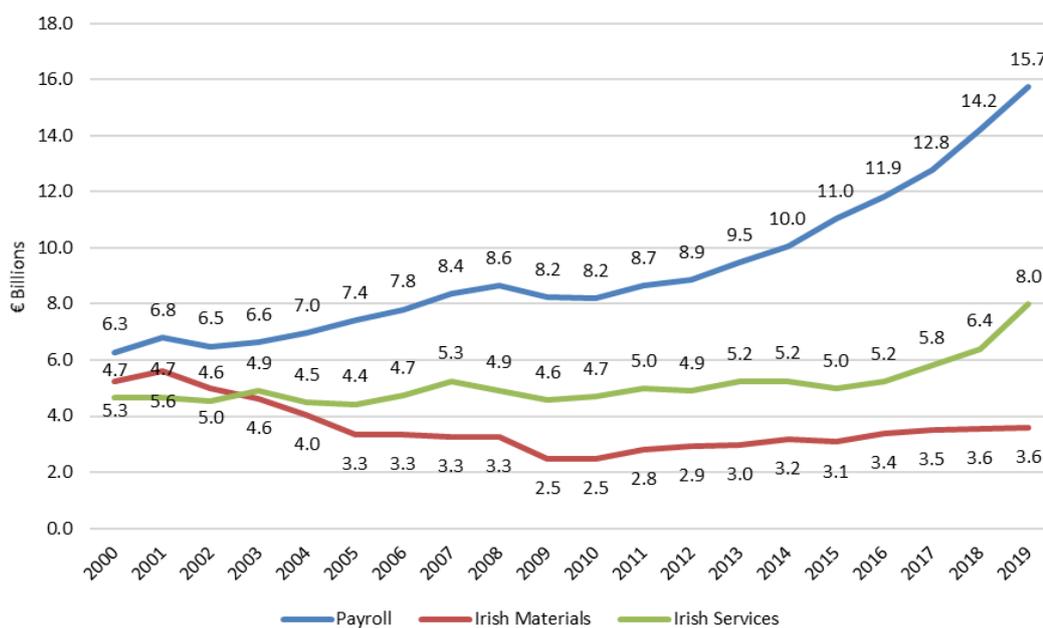
- Irish-owned firms spent €27.0 billion in 2019 in the Irish economy with the largest proportion of this expenditure being on Irish materials. The breakdown of expenditure in 2019 was €8.7 billion on payroll, €12.2 billion on Irish raw materials and €6.1 billion on Irish services.

E.10 Key Business Indicators for Foreign-Owned Companies, 2000-2019 (current prices)



- Sales by foreign-owned companies have increased by 10.5% and exports by 10.4% in 2019 over 2018 to €269.5 billion and €258.4 billion respectively. On a per annum basis between 2000 and 2019, sales increased by 6.5% and exports by 6.9%.
- Value added increased by 16.3% between 2018 and 2019 to €99.9 billion.
- Direct expenditure reached €27.3 billion in 2019, a 12.9% increase over the previous year.

E.11 Direct Expenditure in the Irish Economy by Foreign-owned companies, 2000-2019



- Foreign firms spend less on Irish materials and more on payroll and services than Irish firms. In 2019, direct expenditure by foreign firms amounted to €27.3 billion, comprising €15.7 billion on payroll, €3.6 billion on materials and €8.0 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 2019.

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 twenty years (2000-2019 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 2019/2020.
- All figures in this report are in nominal values (current prices).
- Compound Annual Growth Rate (CAGR). Throughout this report the percentage change between 2000-2010 and 2000-2019 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, 2000-2019

Aggregated data from the Annual Business Survey is available for the period 2000-2019. These results are available in excel format on the Department of Enterprise, Trade and Employment (DETE) website. To access these excel files please go to publications section on the DETE web-site at:

<https://enterprise.gov.ie/en/Publications/ABSEI-2019.html>

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 Enterprise, Trade and Employment (DETE), 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 DETE 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 DETE, to feed into many policy/sectoral studies and enterprise strategies, as well as assessments and evaluations of programmes.

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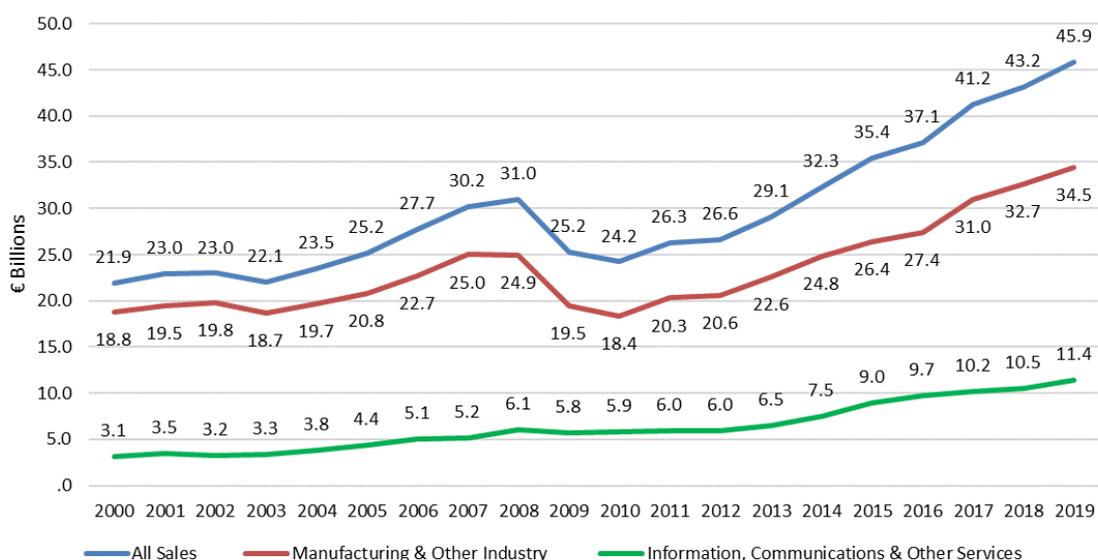
⁴ A regional split is also available in the CSV files published with the report.

Acknowledgement

The Department of Enterprise, Trade and Employment 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, 2000-2019



This graph shows the total level of sales achieved by Irish-owned companies during the twenty 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 line on this graph tracks the growth in the sales up to 2008 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 2019, stood at €45.9 billion for all manufacturing and services companies and is the highest level of sales recorded over the course of this survey. This represents an 6.3% increase over the 2018 figure of €43.2 billion at current prices.
- In the manufacturing & other Industry sector, sales reached the high points of €25.0 billion in 2007 and 24.9 billion in 2008 but then dropped significantly in 2009 to €19.5 billion and to €18.4 billion in 2010. Sales in manufacturing companies have recovered in each of the past nine years and in 2019 sales amounted to €34.5 billion at current prices, their highest ever level.
- Sales in the services sectors have been increasing steadily over the last twenty years and amounted to €11.4 billion in 2019. These sales represent a per annum increase of 7.0% over the 2000 sales figure of €3.1 billion.

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

	2000	2010	2018	2019	Per Annum Change 2000-19	Per Annum Change 2010-19	Per Annum Change 2018-19
	€m	€m	€m	€m	%	%	%
Total All Sectors	21,949	24,220	43,171	45,873	4.0%	7.4%	6.3%
Manufacturing & Other Industry	18,809	18,365	32,660	34,470	3.2%	7.2%	5.5%
Food & Drink	9,216	9,669	15,726	16,098	3.0%	5.8%	2.4%
Traditional Manufacturing	6,282	4,628	8,879	9,550	2.2%	8.4%	7.5%
Modern Manufacturing	819	828	1,581	1,499	3.2%	6.8%	-5.2%
Energy, Water, Waste, Construction	2,492	3,239	6,474	7,323	5.8%	9.5%	13.1%
Infor, Comm. & Other Services	3,140	5,855	10,511	11,402	7.0%	7.7%	8.5%
Information, Comm. & Computer	1,224	1,726	3,627	3,917	6.3%	9.5%	8.0%
Bus., Financial & Other Services	1,916	4,129	6,884	7,486	7.4%	6.8%	8.7%

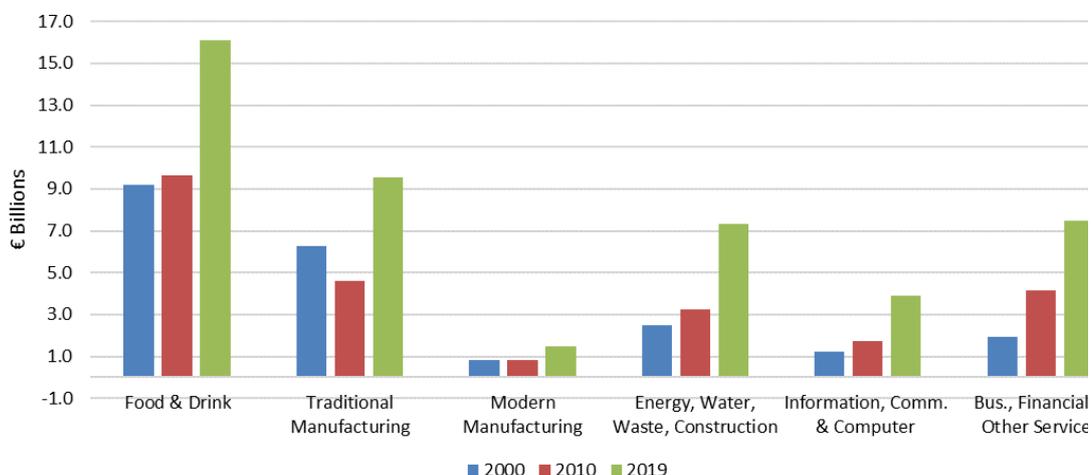
Total sales of Irish-owned manufacturing and service companies amounted to €45.9 billion in 2019 representing an 6.3% increase over the previous year's figures. There was an increase in sales of 5.5% and 8.5% between 2018 and 2019 in the Manufacturing and Services sectors.

The largest sector for Irish-owned clients is the Food & Drink sector with sales of €16.1 billion in 2019 – an increase of 2.4% over 2018 and of 3.0% per annum increase over the 2000 figure of €9.2billion.

Traditional Manufacturing saw an increase in sales of 7.5% over 2018 with sales of €9.6 billion. There has been a per annum increase of 2.2% over the 2000 figure of €6.3 billion.

Information, Communications & Other Services grew 8.5% over 2018 to 11.4 billion and had a per annum increase of 7.0% from the 2000 figure. The Business & Financial & Other sector increased sales to €7.4 billion in 2019 from €1.9 billion in 2000, an annualised increase of 7.4%.

Sales by sector - Irish-owned Client Companies



2.3 Changing Composition of Sales and Employment in Irish-owned Client Companies, 2000 and 2019

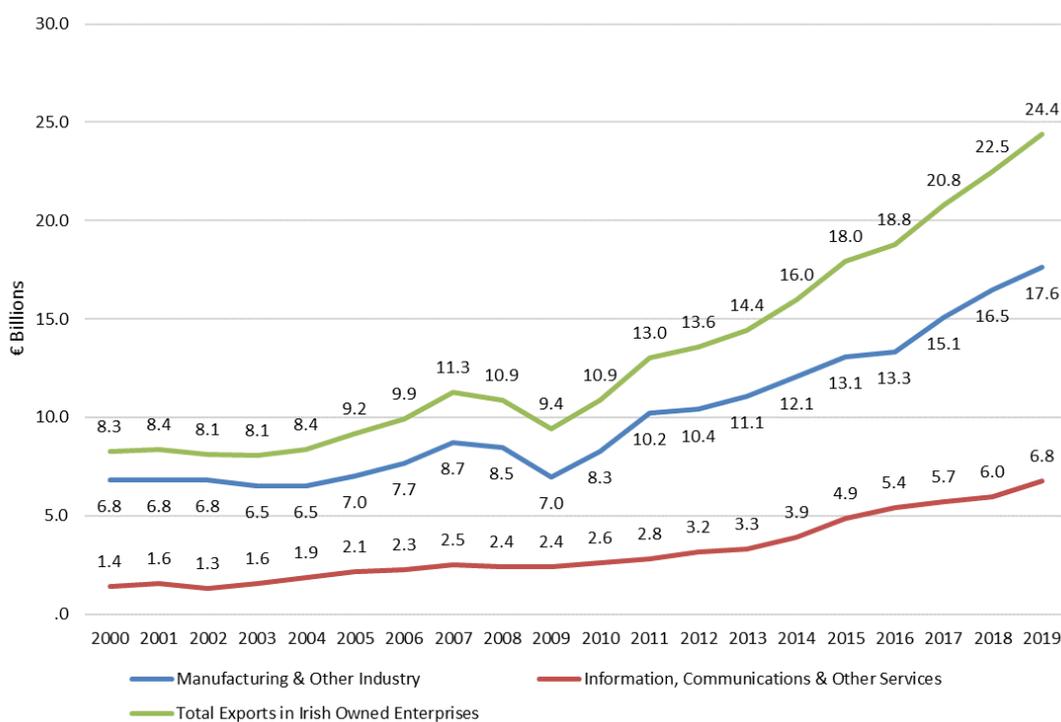
	Sales		Employment	
	2000	2019	2000	2019
Manufacturing & Other Industry	85.7%	75.1%	81.5%	68.3%
Food & Drink	42.0%	35.1%	29.2%	25.8%
Traditional Manufacturing	28.6%	20.8%	43.3%	28.0%
Modern Manufacturing	3.7%	3.3%	4.8%	4.3%
Energy, Water, Waste, Construction	11.4%	16.0%	4.3%	10.2%
Information, Communications & Other Services	14.3%	24.9%	18.5%	31.7%
Information, Communications & Computer	5.6%	8.5%	9.0%	14.1%
Business, Financial & Other Services	8.7%	16.3%	9.5%	17.6%

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 2019.

- The majority of Irish-owned companies operate in the Manufacturing sector, though the share of total sales accounted for by manufacturing has dropped from 85.7% in 2000 to 75.1% in 2019. The Food & Drink sector dropped its share of sales over this period from 42.0% of total Irish-owned sales to 35.1%. The Traditional Manufacturing sector accounted for 28.6% of total sales in 2019 down from 20.8% in 2000.

- The share of sales accounted for by Information, Communication and Other Services has increased from 14.3% in 2000 to 24.9% in 2019, highlighting the increasing importance of these sectors. Within this the Business, Financial and Other Services sector doubled its share of sales from 8.7% to 16.3% over the period 2000-2019.
- While the Food & Drink sector accounted for 35.1% of the sales in Irish-owned industry in 2019, it accounts for 25.8% of the employment. Traditional Manufacturing has witnessed its share of employment drop from 43.3% in 2000 to 28.0% in 2019 while the Energy, Water, Waste & Construction sectors have increased their employment from 4.3% to 10.2%.
- Overall, the Information, Communication and Other Services sector continues to see its share of Irish-owned employment rise significantly from 18.5% in 2000 to 31.7% in 2019.

2.4 Exports in Irish-owned Client Companies, 2000-2019



This graph shows the level of exports by agency-assisted Irish-owned companies during the twenty years of this survey and shows the upward trend in the level of exports since 2010 and amounted to €24.4 billion in 2019.

Exports from the Irish-owned Manufacturing sectors in 2019 amounted to €17.6 billion, which represented 72.0% of all exports in that year. Service exports at €6.8 billion in same year represent 28% of total exports.

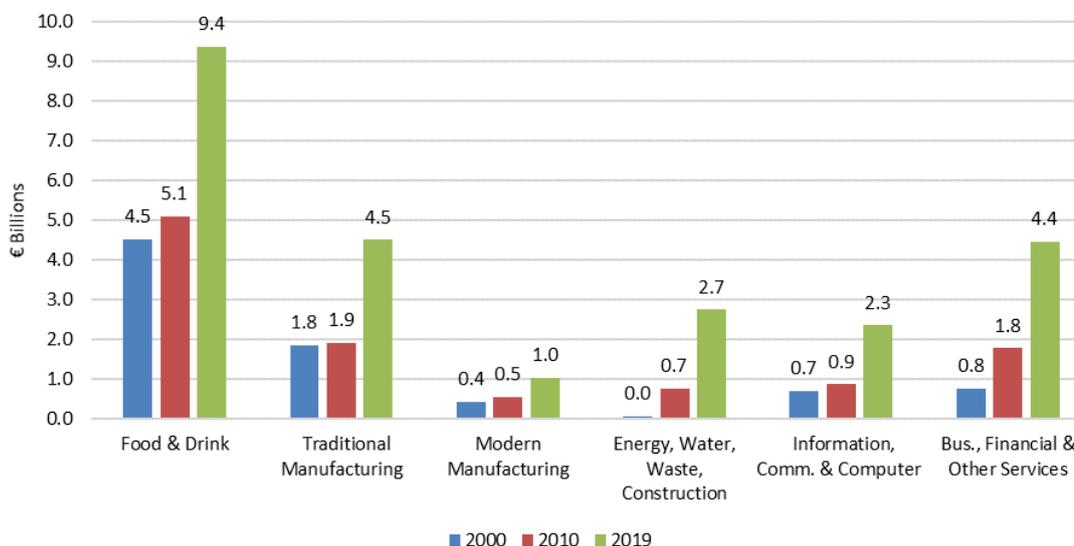
- Total exports in 2019 stood at €24.4 billion for all Manufacturing and Services companies and is the highest level of exports recorded over the course of this survey. This represents a 5.9% per annum change over the 2000 figure of €8.8 billion.
- In the Manufacturing sector, exports have increased steadily since a low in 2009 of €7.0 billion and amounted to €17.6 billion in 2019. This represents a 5.1% per annum increase on the 2000 figure of €6.8 billion and an 10.1% average per annum increase over the figure in 2010 of €8.3 billion. Exports in the Manufacturing sectors increased by 6.9% in 2019 over 2018.
- The value of exports in the Services sector amounted to €1.4 billion in 2000 and has consistently grown in the intervening years to €6.8 billion by 2019. This represents a per annum change of 8.5% between the 2000 and 2019 export figures. Services exports rose by 13.4% between 2018 and 2019.

2.5 Exports by Sector in Irish-owned Companies, 2000, 2010, 2018 and 2019

	2000	2010	2018	2019	Per Annum Change 2000-19	Per Annum Change 2010-2019	Per Annum Change 2018-19
	€m	€m	€m	€m	%	%	%
Total - All Sectors	8,250	10,883	22,474	24,417	5.9%	9.4%	8.6%
Manufacturing & Other Industry	6,821	8,262	16,491	17,630	5.1%	8.8%	6.9%
Food & Drink	4,514	5,086	9,130	9,370	3.9%	7.0%	2.6%
Traditional Manufacturing	1,848	1,892	4,137	4,496	4.8%	10.1%	8.7%
Modern Manufacturing	412	541	1,120	1,028	4.9%	7.4%	-8.2%
Energy, Water, Waste, Construction	46	743	2,104	2,736	24.0%	15.6%	30.0%
Infor., Comm. & Other Services	1,429	2,621	5,983	6,787	8.5%	11.2%	13.4%
Information, Comm. & Computer	679	855	2,076	2,338	6.7%	11.8%	12.6%
Bus., Financial & Other Services	750	1,766	3,906	4,450	9.8%	10.8%	13.9%

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

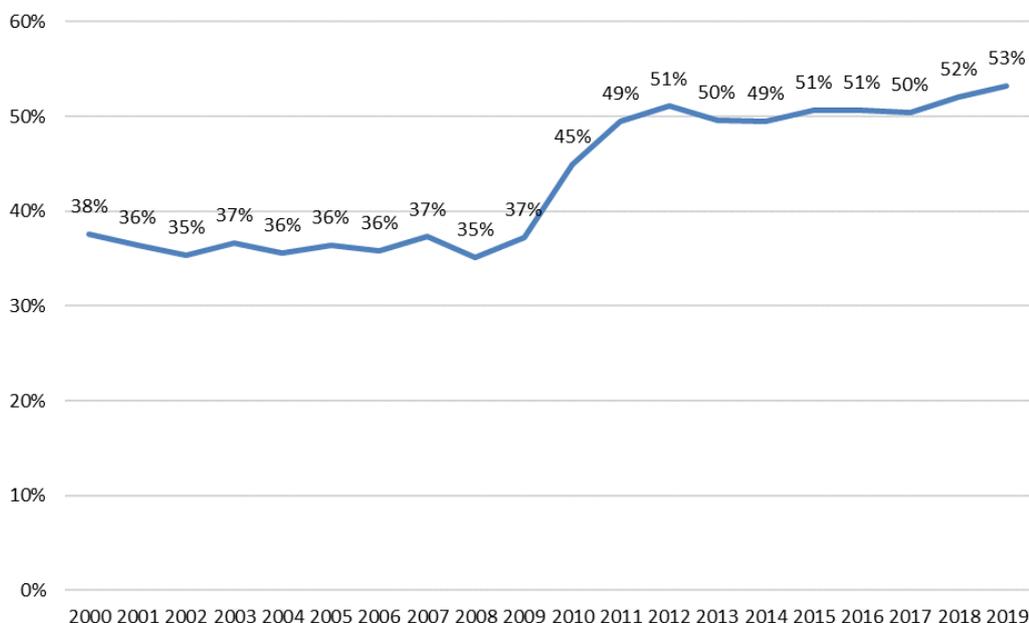
Exports by Sector in Irish-owned Companies, 2000, 2010, 2019



- The Food & Drink sector accounted for 38.3% of all exports of Irish-owned client firms in 2019. This sector has increased exports from €4.5bn in 2000 to €9.3bn in 2019, a per annum increase of 4.2% in current prices.
- Exports in Traditional Manufacturing increased by 8.7% in 2019 over 2018 to €4.5 billion and now accounts for 18.4% of total exports.
- Modern Manufacturing reported a decrease of 8.2% to €1.0 billion in 2019 compared to 1.1 billion in 2018. Modern Manufacturing accounts for 4.2% of Irish-owned firms total exports.
- The Energy, Water, Waste & Construction sectors increased by 30.0% to €2.7 billion in the year to 2019 with 91.9% of this increase being in the construction sector. Energy, Water, Waste & Construction accounts for 11.2% of total exports.
- Exports of Information, Communication & Computer services among Irish-owned firms show a per annum growth of 6.7% since 2000 to stand at €2.3 billion in 2019. This sector now accounts for 9.5% of total exports.

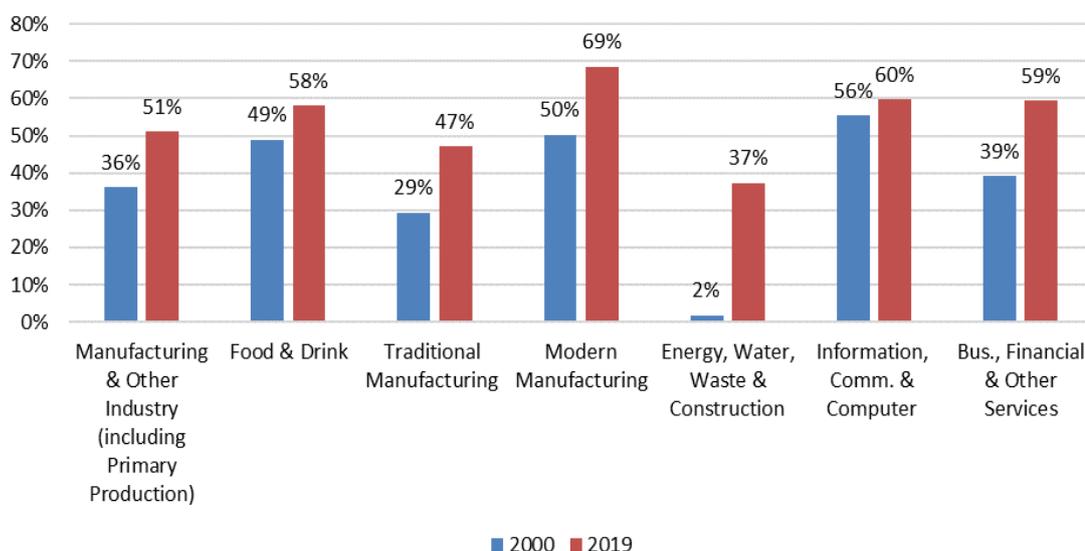
The Business, Financial and Other Services sectors exports have shown strong growth at 9.8% per annum since 2000 and exports in this sector amounted to €4.4 billion in 2019. This sector now accounts for 18.2% of total exports.

2.6 Exports as a percentage of Total Sales in Irish-owned Companies, 2000–2019



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 51%-53% in the last five years. The above graph shows that the total export intensity of Irish-owned industry has increased from 38% in 2000 to 53% in 2019 and highlights the growing importance to Irish businesses of export markets.

Exports as a percentage of Total Sales in Irish-owned Companies by Sector, 2000 and 2019



This chart compares the export intensity of Irish-owned industry by sector for 2000 and 2019.

- The Food & Drink sector accounted for 38.4% of all export sales by Irish-owned companies in 2019 and has an export intensity of 58% in 2019, which is an increase on its 2000 intensity ratio of 49%.
- The sectors with the highest export intensity at 69% in 2019 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 2019, the same level as in 2000.

2.7 Value Added in Irish-Owned Companies, 2000-2019

	Total Value Added			Value Added as % of Sales		Value Added per Person Employed		
	2000	2019	Per Annum Change 2000-19	2000	2019	2000	2019	Per Annum Change 2000-19
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	6,432	16,728	5.2%	29.3%	36.5%	46.5	100.9	4.2%
Manufacturing & Other Industry	3,958	7,487	3.4%	24.3%	21.7%	37.1	77.8	4.0%
Food & Drink	1,427	3,122	4.2%	15.5%	19.4%	35.4	73.1	3.9%
Traditional Manufacturing	2,267	3,847	2.8%	36.1%	40.3%	37.9	82.7	4.2%
Modern Manufacturing	264	272	0.1%	32.3%	18.1%	40.1	38.4	-0.2%
Energy, Water, Waste, Construction	699	2,714	7.4%	28.1%	37.1%	117.7	160.4	1.6%
Info./Comm./ Other Services	1,775	6,527	7.1%	56.5%	57.2%	69.4	124.0	3.1%
Information, Comm. & Computer	673	2,472	7.1%	55.0%	63.1%	54.0	105.5	3.6%
Business, Fin. & Other Services	1,101	4,054	7.1%	57.5%	54.2%	84.1	139.0	2.7%

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 €16.7 billion in 2019. Total value added is estimated to have grown by 5.2% per annum in nominal terms over the period 2000-2019.

- Across all Irish-owned Manufacturing and Information, Communication and Other Services sectors, value added as a percentage of sales has increased from 29.3% in 2000 to 36.5% in 2019.
- Overall, value added per person employed in Manufacturing and Information, Communication and Other Services is estimated at €100,900 in 2019, an increase of 4.2% 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 2019

	Total Payroll			Payroll per Employee		
	2000	2019	Per annum change 2000-19	2000	2019	Per annum change 2000-19
	€m	€m	%	€k	€k	%
Total - All Sectors	3,814	8,686	4.4%	27.6	52.4	3.4%
Manufacturing & Other Industry	3,001	5,491	3.2%	26.6	48.5	3.2%
Food & Drink	1,063	1,824	2.9%	26.3	42.7	2.6%
Traditional Manufacturing	1,437	2,281	2.5%	24.0	49.1	3.8%
Modern Manufacturing	183	394	4.1%	27.7	55.6	3.7%
Energy, Water, Waste, Construction	319	992	6.2%	53.7	58.7	0.5%
Info./ Comm./Other Services	812	3,196	7.5%	31.8	60.7	3.5%
Information, Comm./ Computer	480	1,487	6.1%	38.5	63.4	2.7%
Business, Financial & Other Services	333	1,709	9.0%	25.4	58.6	4.5%

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 2019.

- Total payroll has increased at a rate of 4.4% per annum over the period 2000-2019. Payroll in the Manufacturing sector and the Information, Communication and Other Services sector increased from €3.8 billion in 2000 to €8.6 billion in 2019. Manufacturing and Other Industry firms accounts for 63.2% (€5.4 billion) of total payroll and Information, Communication and Other Internationally Traded Services firms account for the remaining 36.8 % (€3.2 billion) in 2019.

Payroll per employee in Irish-owned Manufacturing and Information, Communication and Other Services sectors averaged at €52,392 in 2019, representing an increase of 3.4% per annum over the period 2000 to 2019.

- In the Manufacturing sector, payroll per employee increased from €26,631 in 2000 to €48,513 in 2019. 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 €31,787 in 2000 to €60,738 in 2019.
- The highest average payroll per employee figure in 2019, was €63,404 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, 2019

	Materials Purchased 2019			Services Purchased 2019		
	Total Materials	Irish Materials	Irish as % Total	Total Services	Irish Services	Irish as % Total
	€m	€m	%	€m	€m	%
Total - All Sectors	19,660	12,205	62.1%	9,485	6,057	63.9%
Manufacturing & Other Industry	17,989	11,637	64.7%	6,280	4,551	72.5%
Food & Drink	11,008	8,676	78.8%	1,968	1,635	83.1%
Traditional Manufacturing	4,522	1,850	40.9%	1,180	947	80.2%
Modern Manufacturing	733	162	22.1%	249	165	66.4%
Energy, Water, Waste, Construction	1,727	950	55.0%	2,883	1,804	62.6%
Information, Comm. & Other Services	1,671	568	34.0%	3,205	1,505	47.0%
Information, Comm. & Computer	586	149	25.5%	858	566	66.0%
Business, Financial & Other Services	1,084	418	38.6%	2,347	939	40.0%

Total raw materials purchases amounted to approximately €19.6 billion in 2019, of which €12.2 billion (62.1%) was sourced in Ireland.

- Within the Food and Drink sector, Irish raw materials at €8.6 billion accounted for 78.8% of the total materials spend in that sector. Of all the Irish raw materials purchases by Irish-owned firms, the majority or 71.1% related to the Food and Drink sector in 2019.
- Within the Traditional Manufacturing sectors, 40.9% of materials were sourced in Ireland in 2019, amounting to over €1.9 billion in value.
- For Modern Manufacturing, 22.1% of total materials purchases were Irish materials, amounting to €162 million.
- In the Energy, Water, Waste & Construction sectors 55.0% of all materials were bought in Ireland in 2019.

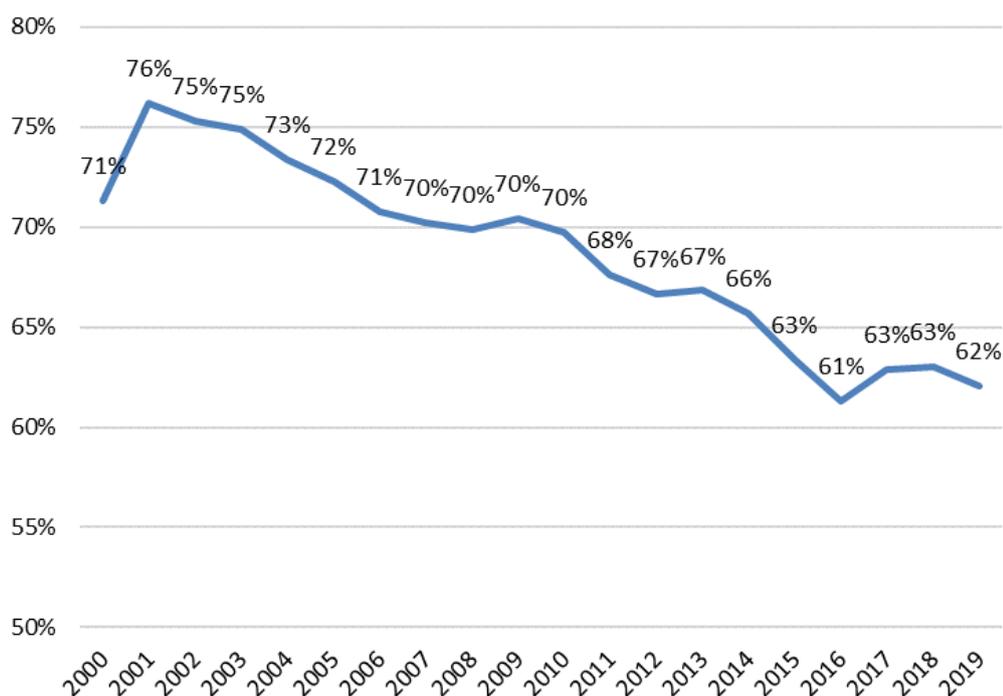
In addition to raw materials, Irish-owned Manufacturing and Information, Communication and Other Services firms spent a further €9.4 billion on services in 2019, with 63.9%, or €6.1 billion sourced in Ireland.

- The proportion of Irish services purchased by Irish-owned firms, ranges from 40.0% for Business, Financial and Other Services firms to 83.1% for Food and Drink firms.
- Overall, the €12.0 billion of materials purchased in Ireland in 2019 continue to significantly outweigh the services purchased in Ireland which stand at €6.1 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, 2000-2019



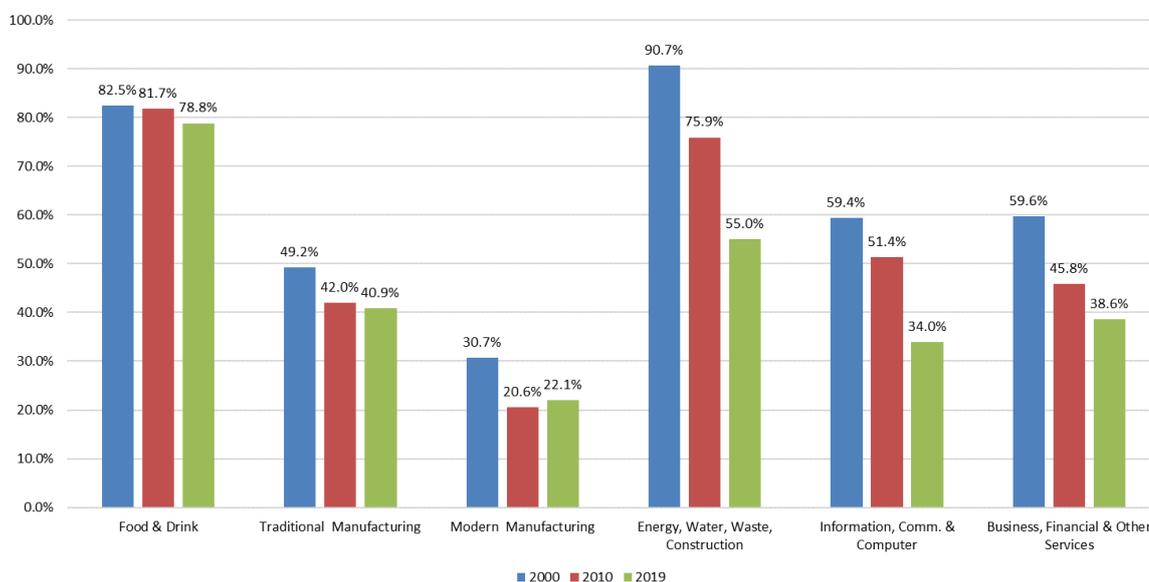
This graph maps out the share of total materials sourced in Ireland by Irish-owned Manufacturing and Services firms. In 2019, 62% of all materials purchased were sourced in Ireland compared with 71% in 2000. The 2019 returns showed a decrease of 1.0% over the 2018 figures.

The bar chart below sets out the position by sector for 2000, 2010 and 2019:

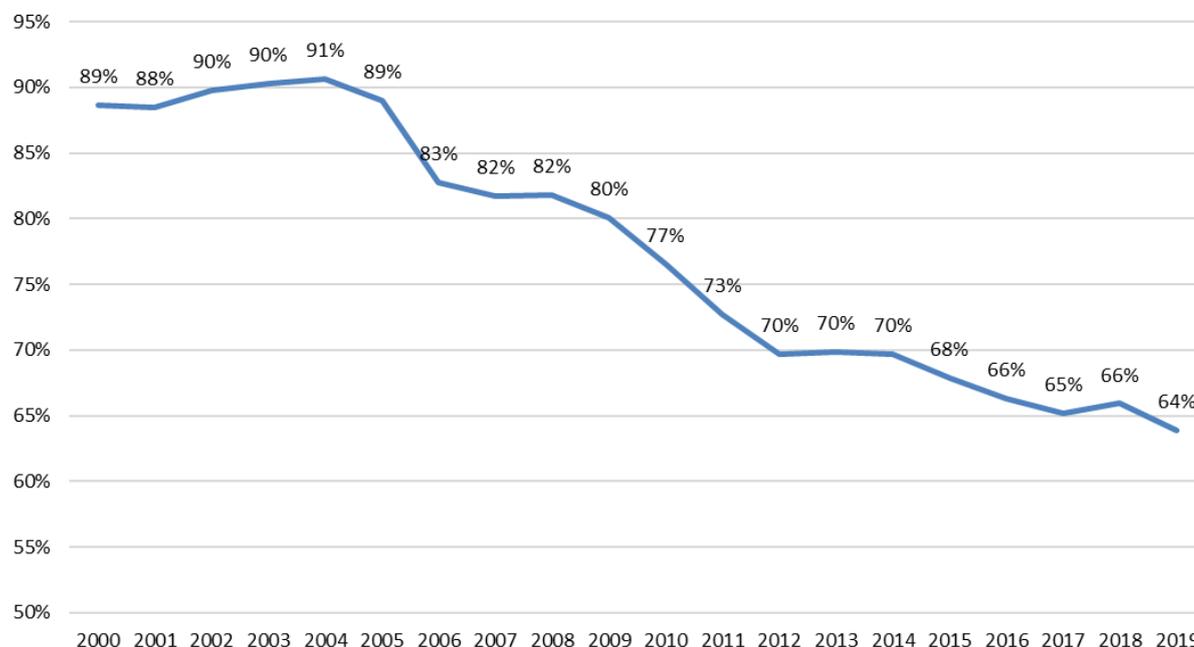
- The Food & Drink sector purchased the majority or 78.8% of its materials in Ireland in 2019. This represents a decline from the 2000 and 2010 figures of 82.5% and 81.7%. (Absolute value was €8,676m).

- 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 90.7%, but in 2019 the percentage of Irish sourced materials was 55.0% (Absolute value was €950m).
- The Traditional Manufacturing sector share of Irish-sourced materials stood at 49.2% in 2000 and has decreased since and its purchases of Irish-sourced materials now represent 40.9% of total materials outlay in 2019. (Absolute value was €1,850m).
- The total value of Irish materials purchased by the services sectors amounted to €568m in 2019, 33.4% of their total spend on materials.

Irish-Sourced Materials as a Share of Total Material Purchased, 2000, 2010, 2019



2.11 Irish-Sourced Services as a Share of All Service Purchased, 2000-2019



This graph shows the share of total services sourced in Ireland by Irish-owned Manufacturing and Services firms. At 64%, the majority of services purchases were sourced in Ireland in 2019 though this represents a decline from 89% from 2000.

The bar chart below shows that purchases of Irish services ranged between 47% in the Business, Finance & Other Services sector to 83% in the Traditional Manufacturing sector in 2019. 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 83% in 2019. (Absolute value was €1,635m).

Traditional Manufacturing increased its share of Irish services purchases to 82% in 2019 from 83% in 2000. (Absolute value was €947 million).

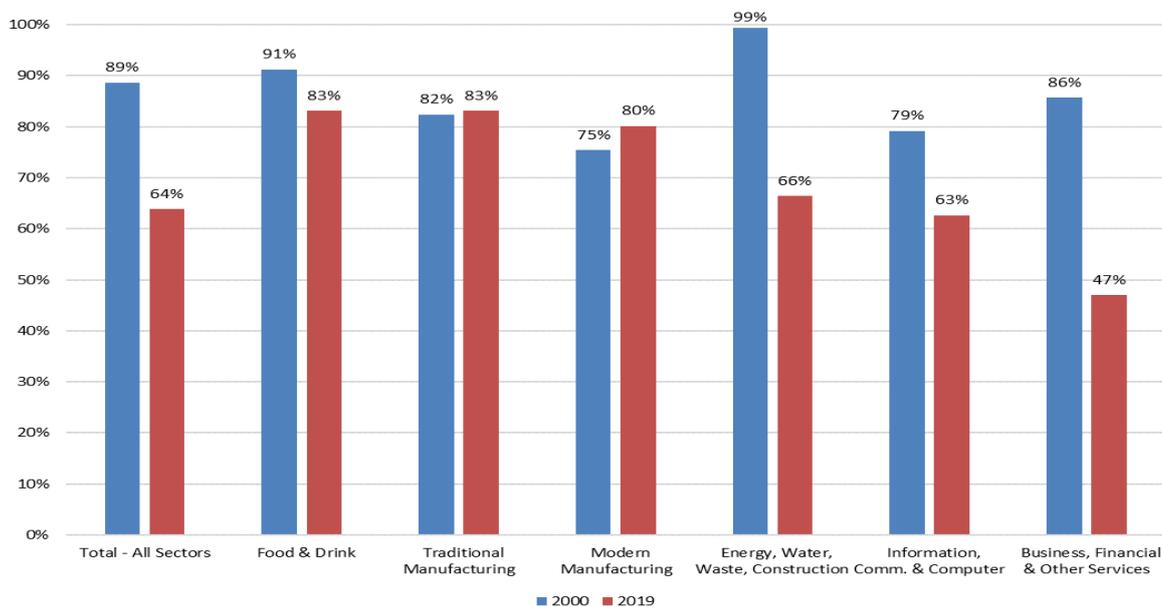
The Modern Manufacturing sector’s share of services sourced in Ireland increased from 75% in 2000 to 80% in 2019. (Absolute value was €165 million).

The Information, Communications and Computer sector’s share of services purchases sourced in Ireland fell from 79% in 2000 to 63% in 2019. (Absolute value was €566 million).

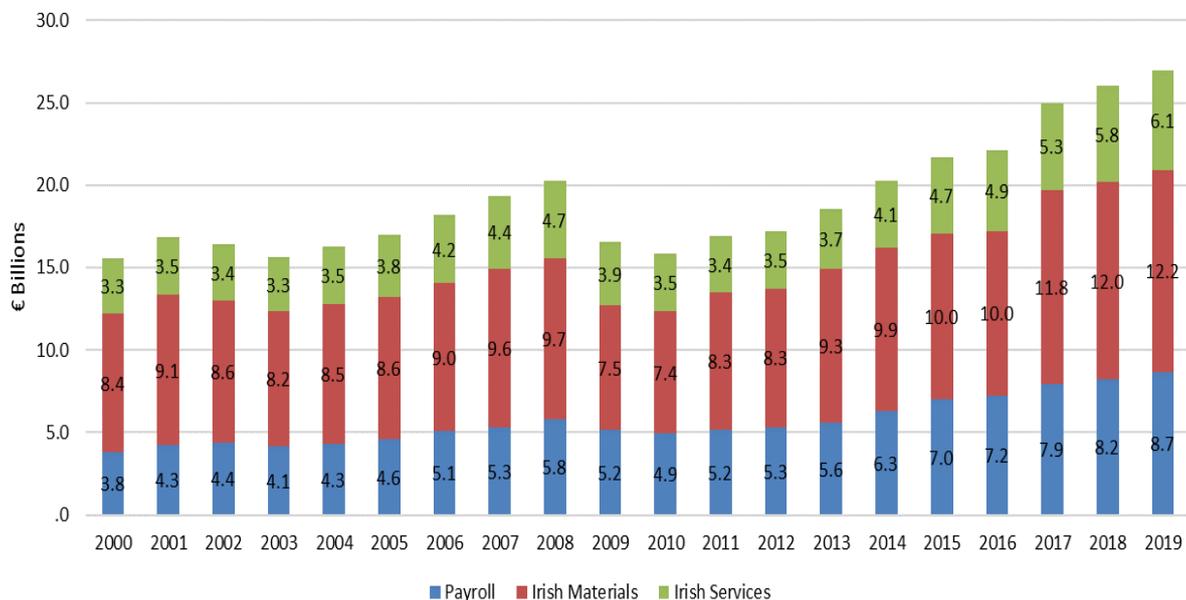
The Business, Financial and Other Services sector sourced 47% of their services requirements in Ireland in 2019, down from 86% in 2000. (Absolute value was €939 million).

The Energy, Water, Waste & Construction sectors sourced 66% of their services in Ireland at a value of €1,804m.

Irish-Sourced Services as a Share of All Service Purchased, 2000 and 2019



2.12 Total Direct Expenditure in the Irish Economy by Irish-Owned Companies, 2000-2019



This chart summarises the total expenditure in the domestic economy by Irish-owned manufacturing and services firms throughout the period 2000-2019.

- In total, Irish-owned firms spent €26.9 billion in the domestic economy in 2019, comprising of:

- €8.7 billion on payroll;
- €12.2 billion on Irish raw materials;
- €6.1 billion on Irish services.

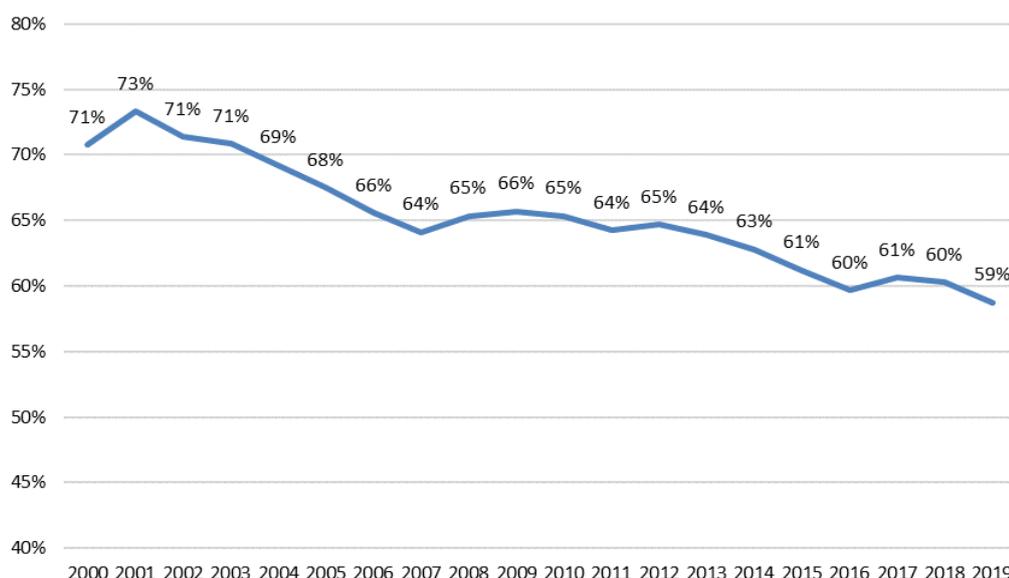
This represents an annual increase in 2019 of 3.5% over 2018 returns.

- Direct expenditure has increased from €16.1 billion in 2000 and shows an overall nominal increase of 2.8% per annum between 2000 and 2019. Over the period 2000 to 2019:
 - 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 54% and Irish services were 21% of total Irish economy expenditure. In 2019, these shares have changed, with payroll now making up 32%, Irish materials accounting for 45% and Irish services accounting for 23% 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, 2000-2019

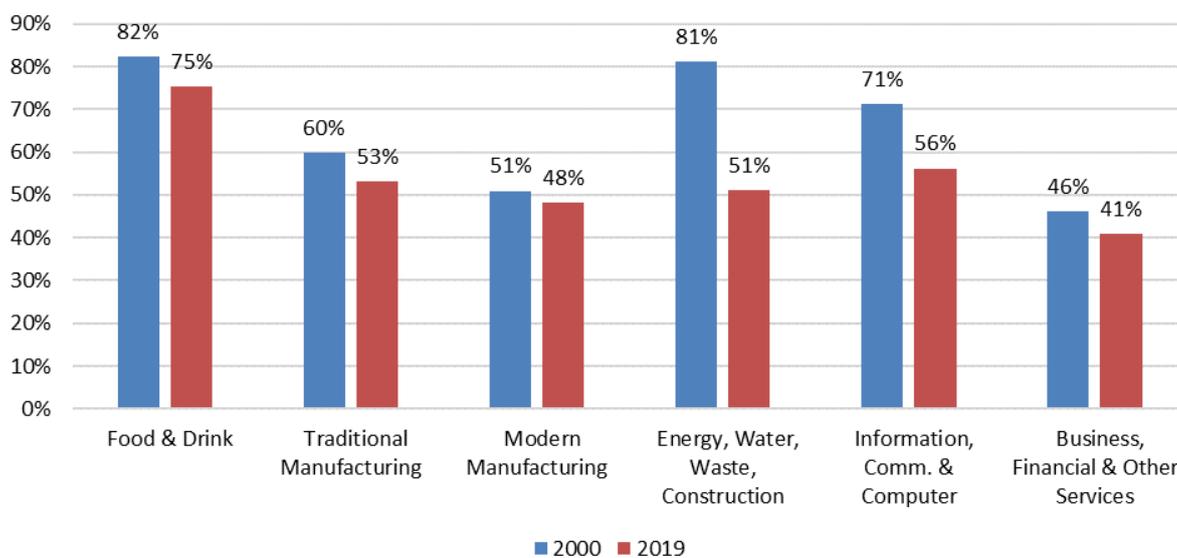


This chart shows the trend in direct expenditure in the economy as a percentage of sales for all Irish-owned firms and for the broad aggregated sectors.

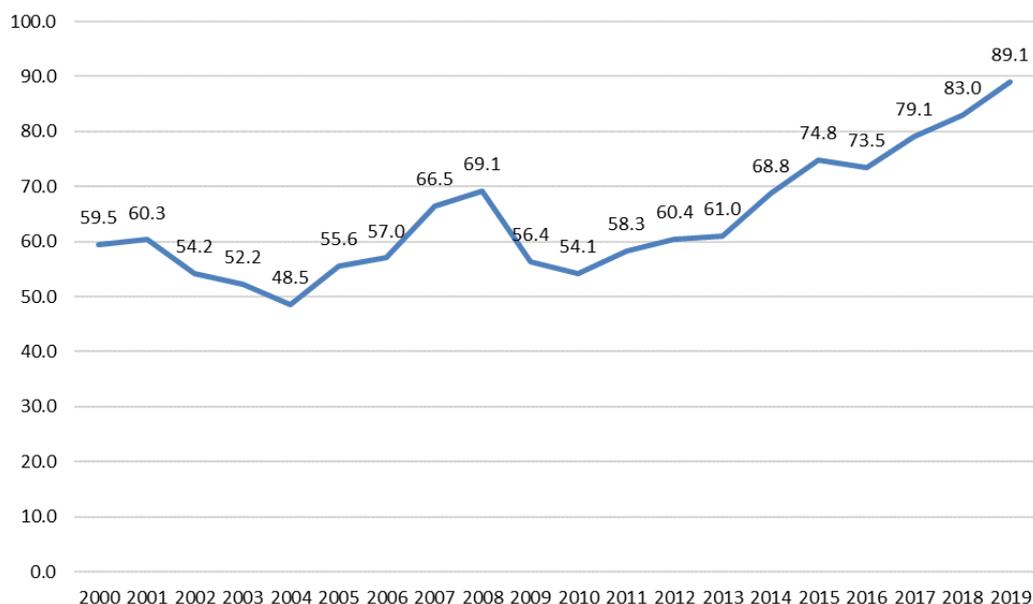
Total direct expenditure as a percentage of sales stood at 71% in 2000. By 2010 this percentage had reduced to 65% and in 2019 stands at 59%.

- The Food and Drink sector maintained the highest share of direct expenditure as a percentage of sales at 75% in 2019 down from 82% in 2000.
- The Energy Water, Waste and Construction sector also saw a fall-off on this metric from 81% in 2000 to 51% in 2019.
- In percentage terms direct expenditure in the Information, Communications and Computer Services sector stood at 71% of sales in 2000 and decreased to 56% in 2019.
- 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



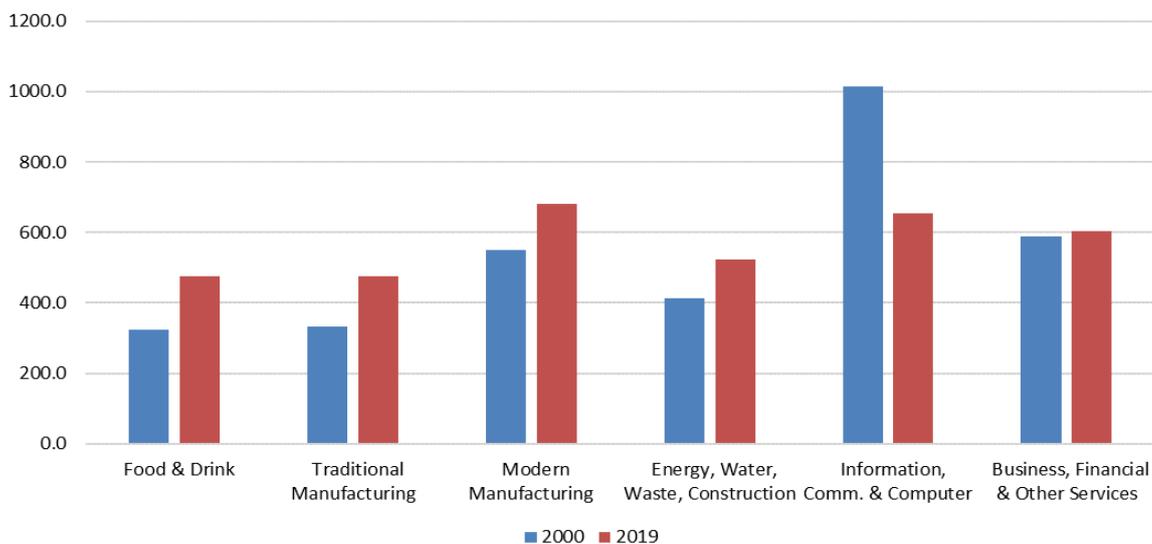
2.14 Formal Structured Training in Irish-owned Companies, 2000-2019



Total expenditure on training amounted to €89.1 million in 2019. This is the highest amount Irish-owned companies spent on formal structured training in the time series.

- The manufacturing and other sectors spent €56.1 million on training in 2019, accounting for 63.0% of total training expenditure.
- Expenditure on training in the services sectors also increased in 2019 to €32.9 million.

Formal Structured Training per person employed in Irish-owned Companies by Sector, 2000-2019



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

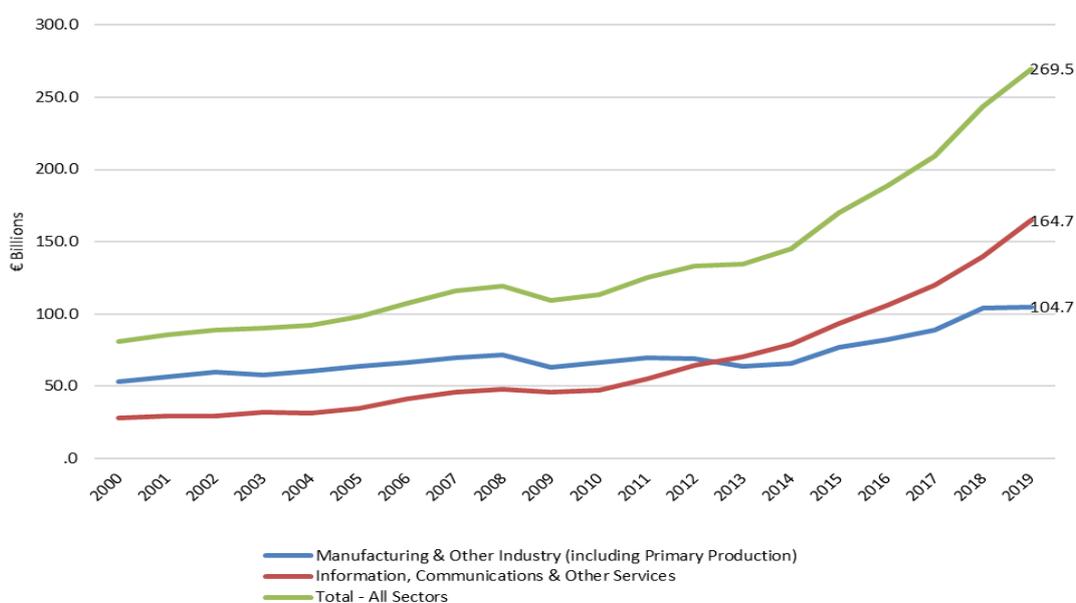
- The Traditional Manufacturing sector spent €22.1 million on training in 2019 which represents 24.8% of all training expenditure by all Irish-owned client companies.
- The next highest spending sector was Food & Drink with €20.4 million in 2019.
- Overall expenditure on training per person employed in Irish-owned companies increased from €509.6 in 2018 to €537.3 in 2019. Since 2000 expenditure on training per person has increased from €430.2 to €537.3.
- The biggest change in training per person employed was in the IT Services sector where it decreased from €1,013.6 in 2000 to €653.7 in 2019, a decline of 35.5%. Manufacturing and Other Industries increased expenditure on training per person employed by 42.8% between 2000 and 2019.

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, 2000-2019



Total sales of foreign-owned agency assisted companies increased by 10.5% per annum in nominal terms over 2018, amounting to €269.5 billion in 2019.

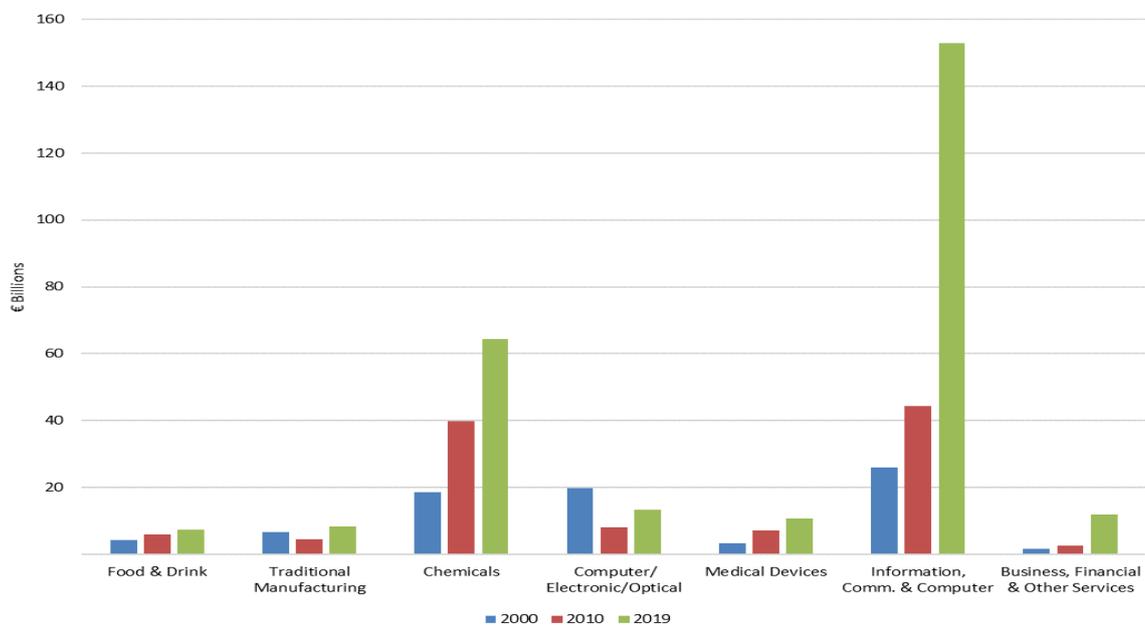
- Manufacturing and Other Industry sectors accounted for €104.7 billion of total sales, equating to 38.9% of all sales in foreign-owned companies.
 - Sales in the Manufacturing sectors increased by 0.8% in 2019 over the previous year.
 - The per annum average increase over the twenty years from 2000-2019 for Manufacturing sectors is 3.6%. Sales have fluctuated since 2010 but the last five 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 €27.8 billion in 2000 to €164.7 billion in 2019. This is a per annum average increase of 9.8% over that twenty-year period.
 - The 2019 sales figure of €164.7 billion represents an increase of 17.8% over the 2018 sales figure of €139.8 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	2010	2018	2019	Per Annum Change 2000-19	Per Annum Change 2010- 19	Per Annum Change 2018-19
	€m	€m	€m	€m	%	%	%
Total - All Sectors	81,019	113,539	243,772	269,454	6.5%	10.1%	10.5%
Manufacturing & Other Industry	53,073	66,209	103,620	104,422	3.6%	5.2%	0.8%
Food & Drink	4,344	5,963	7,423	7,393	2.8%	2.4%	-0.4%
Traditional Manufacturing	6,724	4,738	8,375	8,477	1.2%	6.7%	1.2%
Chemicals	18,697	39,848	63,902	64,409	6.7%	5.5%	0.8%
Computer/ Electronic/Optical	19,955	8,305	13,669	13,423	-2.1%	5.5%	-1.8%
Medical Devices	3,354	7,356	10,251	10,721	6.3%	4.3%	4.6%
Infor., Comm. & Other Services	27,878	47,277	139,787	164,717	9.8%	14.9%	17.8%
Infor., Comm. & Computer	26,168	44,473	129,354	152,718	9.7%	14.7%	18.1%
Bus., Financial & Other	1,710	2,804	10,433	11,999	10.8%	17.5%	15.0%

Sales by sector - Foreign-owned Companies, 2000, 2010, 2019



Between 2000 and 2019, the Information, Communications and Computer Services sector, recorded a per annum growth of 9.7% and at €152.7 billion represented 56.7% of total sales by foreign-owned client firms in 2019.

- The Chemicals sector accounted for 23.9% of total sales in 2019. Sales in the sector totalled €64.4 billion in 2019, a per annum increase of 6.7% over the 2000 sales figure of €18.7 billion.
- The Computer, Electronic and Optical Products sector reported sales of €13.4 billion in 2019, a decrease of 1.8% over the 2018 figure of €13.6 billion. This is a sector that has seen a per annum decrease of 2.1% since 2000.

3.3 Changing Composition of Sales and Employment in Foreign-owned Client Companies 2000 and 2019

Year	Sales		Employment	
	2000	2019	2000	2019
Manufacturing & Other Industry	65.6%	38.9%	72.0%	47.1%
Food & Drink	5.4%	2.7%	7.0%	3.6%
Traditional Manufacturing	8.7%	3.2%	23.7%	9.2%
Chemicals	23.1%	23.9%	13.1%	12.3%
Computer, Electronic & Optical Products	24.6%	5.0%	18.8%	6.2%
Medical Devices	4.1%	4.0%	8.9%	15.5%
Information, Comm. & Other Services	34.4%	61.1%	28.0%	52.9%
Information, Comm. & Computer	32.3%	56.7%	24.2%	39.6%
Business, Financial & Other Services	2.1%	4.5%	3.8%	13.3%

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 2019.

In terms of sales, the relative importance of manufacturing activity has decreased, accounting for 38.9% of all sales in 2019, down from 65.6% in 2000. The Information, Communication & Other Services now accounts for 61.1% of sales, up from 34.4% in 2000.

In 2019, the following two sectors made up 80.6% of total sales of foreign-owned companies:

- Information, Communication and Computer Services sector (56.7%)
- Chemicals sector (23.9%)

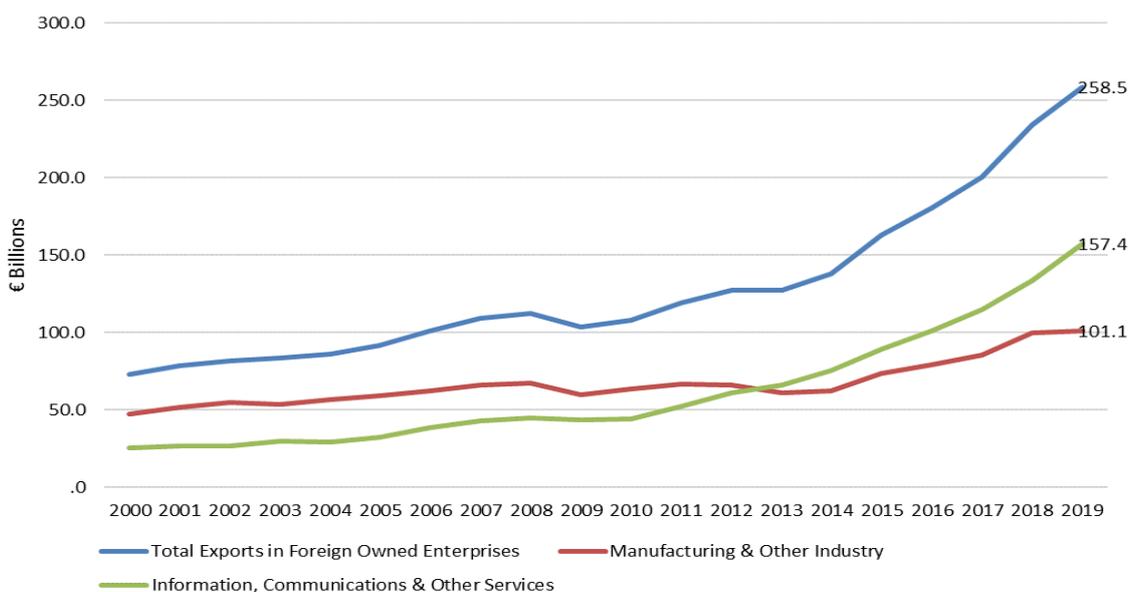
In terms of employment, a different pattern emerges, with Manufacturing accounting for just under half of employment (47.1%) in 2019.

- The Medical Devices sector has 15.5% of employment, up from 8.9% in 2000.
- The Chemicals sector is the next most significant in terms of employment with 12.3% which is a decrease on the 2000 figure of 13.1%.

In Internationally-traded Services:

- The Information, Communications and Computer Services sector has the highest share of total employment, at 39.6% in 2019, up from 24.2% in 2000.

3.4 Exports in Foreign-owned Client Companies, 2000-2019



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

The 2019 export sales figure of foreign-owned companies in Ireland at €258.5 billion equates to 95.9% 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 17.6% in 2019 over the 2018 figure of €133.8 billion and with the exception of 2009 have recorded increases in every year since 2000.
 - The Information, Communications and Other Services sector accounted for 60.9% of all export sales in 2019 at €157.4 billion.
 - This important sector has seen an annual average increase of 10.1% in the twenty-year period between 2000 and 2019.
- The Manufacturing sectors accounted for 39.1% of all exports in foreign-owned companies in Ireland in 2019 and amounted to €101,083 billion.
 - Manufacturing exports increased by 0.8% in 2019 over the 2018 export sales figure of €100,231 billion.
 - The average annualised increase in Manufacturing exports since 2000 is 4.1% from a base of €47.3 billion in current prices, with notable decreases in 2009, 2013 and 2014 before recovering in years 2015 - 2019.

3.5 Exports by Sector in Foreign-owned Companies, 2000, 2010, 2018 and 2019

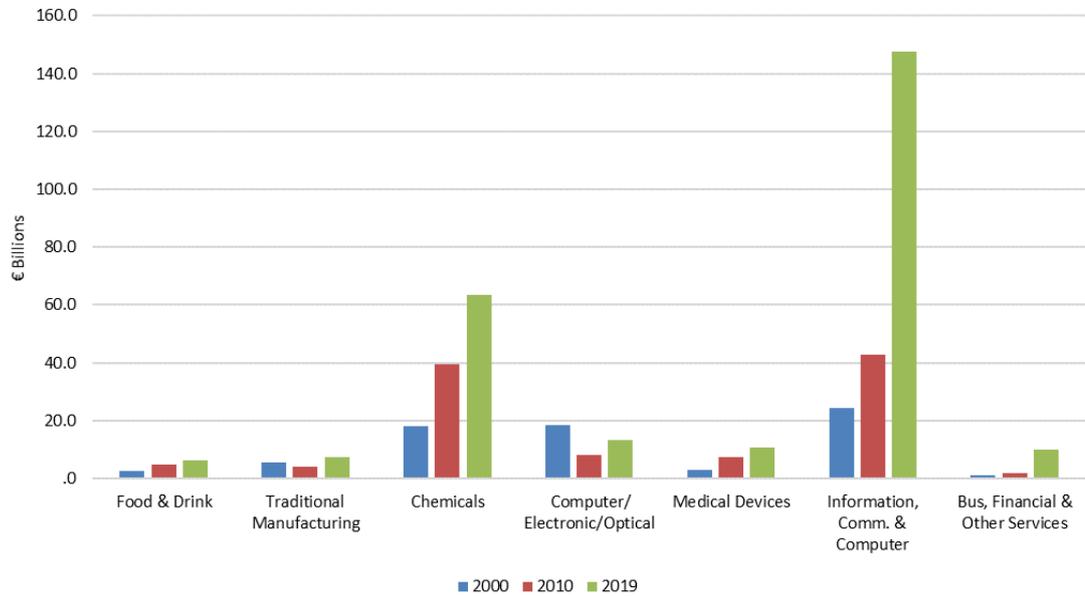
	2000	2010	2018	2019	Per Annum Change 2000-19	Per Annum Change 2010-19	Per Annum Change 2018-19
	€m	€m	€m	€m	%	%	%
Total All Sectors	72,814	108,251	234,009	258,455	6.9%	10.2%	10.4%
Manufacturing & Other Industry	47,342	63,628	100,231	101,083	4.1%	5.3%	0.8%
Food & Drink	2,566	4,598	6,351	6,414	4.9%	3.8%	1.0%
Traditional Manufacturing	5,339	4,141	7,237	7,240	1.6%	6.4%	0.0%
Chemicals	17,899	39,309	62,971	63,566	6.9%	5.5%	0.9%
Computer, Electronic & Optical	18,461	8,235	13,545	13,282	-1.7%	5.5%	-1.9%
Medical Devices	3,054	7,314	10,084	10,533	6.7%	4.1%	4.5%
Infor., Comm. & Other Services	25,472	44,622	133,778	157,373	10.1%	15.0%	17.6%
Infor., Comm. & Computer	24,400	42,705	125,163	147,489	9.9%	14.8%	17.8%
Bus., Financial & Other Services	1,072	1,917	8,615	9,883	12.4%	20.0%	14.7%

The Information, Communications & Computer services sector had the largest level of exports in 2019 at €147.5 billion. This is an increase of 17.8% over 2018 and an 9.9% annual increase in nominal terms since 2000 when exports stood at €24.4 billion.

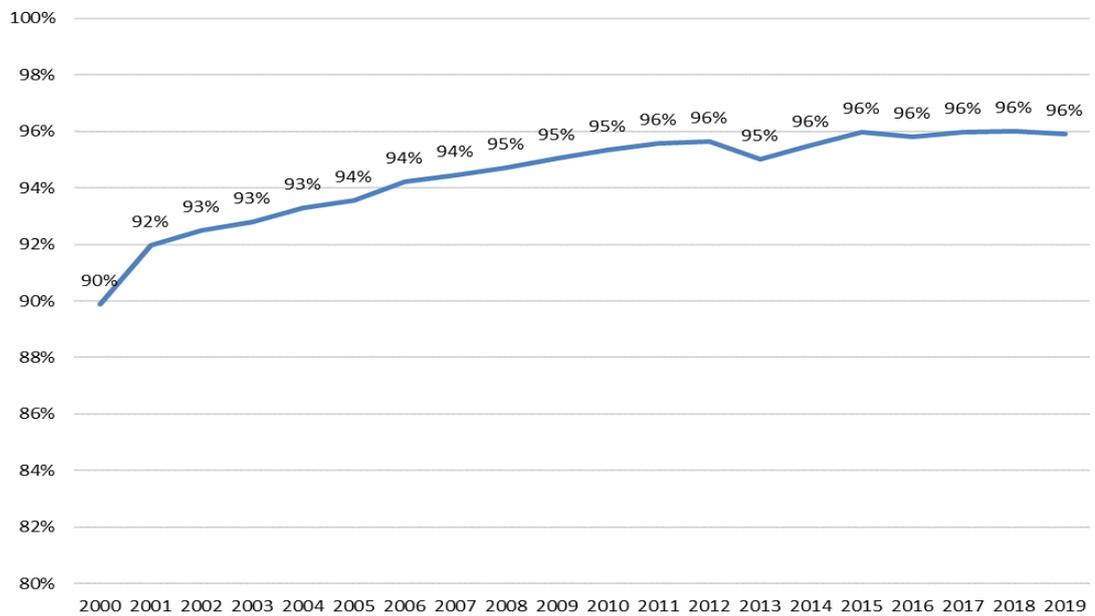
Exports in the Chemicals sector were also significant in 2019 at €63.6 billion, an increase of 0.9% in 2019 over 2018 and an average annual increase of 6.9% since 2000.

The Computer, Electronic & Optical sector saw a decrease of 1.9% 2019 over 2018 with exports of €13.2 billion. This sector's exports experienced an average annual decrease of 1.7% between 2000 and 2019.

Exports by Sector in Foreign-owned Companies, 2000, 2010, and 2019

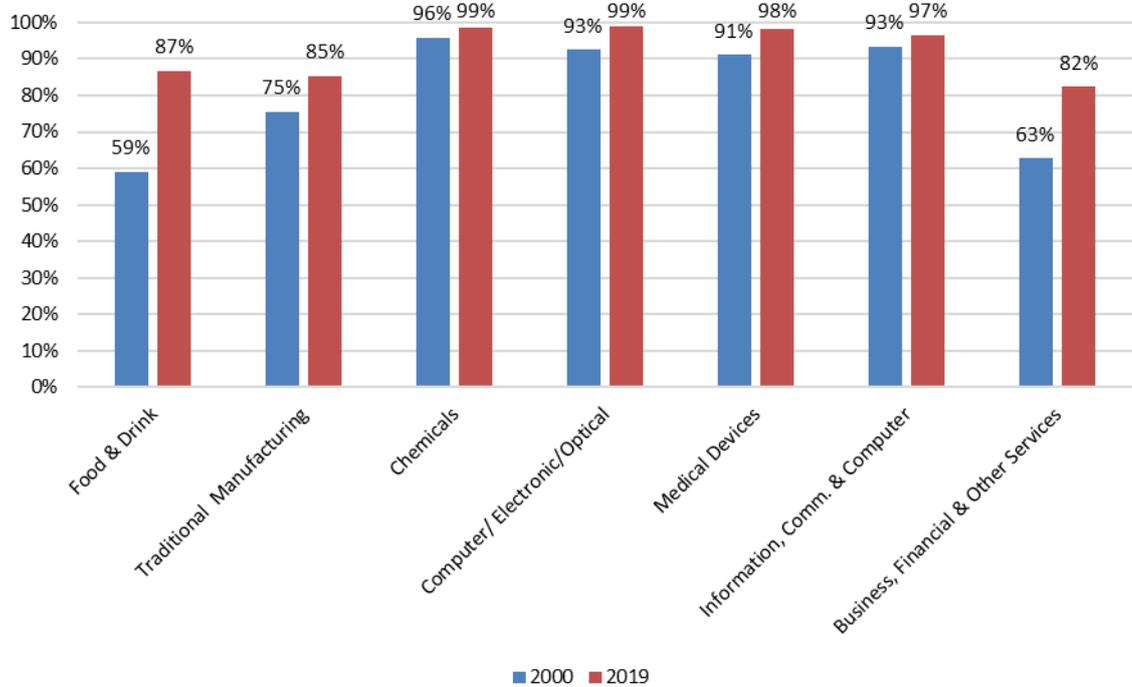


3.6 Exports as a percentage of Total Sales in Foreign-owned Companies, 2000-2019



- The total export intensity of foreign-owned industry has increased from 90% in 2000 to 96% in 2011 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, 2019



- 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 2019, up from 93% in 2000.
- The Food & Drink sector, with an 87% share of sales for export in 2019, increased its proportion of exports from 59% in 2000.
- Similarly, the Traditional Manufacturing sector has increased its proportion of sales for export, from 75% in 2000 to 85% in 2019.

3.7 Value Added in Foreign-owned Companies, 2000-2019

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2019	Per Annum Change 2000-19	2000	2019	2000	2019	Per Annum Change 2000-19
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	34,291	99,880	5.8%	42.3%	37.1%	199.1	490.9	4.9%
Manu./ Other Industry	24,369	50,521	3.9%	45.9%	48.2%	196.6	527.3	5.3%
Food & Drink	1,964	3,741	3.5%	45.2%	50.6%	162.3	517.5	6.3%
Traditional Manu.	2,454	2,765	0.6%	34.7%	32.6%	60.1	148.3	4.9%
Chemicals	10,529	31,875	6.0%	56.3%	49.5%	466.1	1272.1	5.4%
Computer, Electronic & Optical	7,525	7,928	0.3%	37.7%	59.1%	232.8	625.5	5.3%
Medical Devices	1,875	4,130	4.2%	55.9%	38.5%	122.4	131.1	0.4%
Inform./ Comm. & Other Services	9,921	49,359	8.8%	35.6%	30.0%	205.8	458.5	4.3%
Information/ Comm. & Computer	8,558	42,050	8.7%	32.7%	27.5%	205.7	521.7	5.0%
Business, Fin. & Other Services	1,363	7,309	9.2%	79.7%	60.9%	206.3	270.1	1.4%

The total value added of foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €99.9 billion in 2019.

Although total value added grew at a rate of 5.8% per annum in nominal terms over the period 2000-2019, there are differences at sectoral level. There was growth of 8.8% 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 42.3% in 2000 to 37.1% in 2019.

Overall, value added per person employed in Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €490.9 in 2019, an increase of 4.9% 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 2019

	Total Payroll			Payroll per Employee		
	2000	2019	Per annum change 2000-19	2000	2019	Per annum change 2000-19
	€m	€m	€m	€k	€k	%
Total - All Sectors	6,282	15,741	5.0%	61.8	77,361	1.2%
Manufacturing & Other Industry	4,356	7,079	2.6%	35.1	73,874	4.0%
Food & Drink	475	536	0.6%	39.3	74,187	3.4%
Traditional Manufacturing	1,232	1,126	-0.5%	30.2	60,373	3.7%
Chemicals	952	2,341	4.9%	42.1	93,437	4.3%
Computer Electronic Optical	1,224	1,003	-1.0%	37.9	79,119	4.0%
Medical Devices	436	2,007	8.4%	28.5	63,729	4.3%
Info./ Comm./Other Services	1,926	8,663	8.2%	40.0	80,465	3.8%
Information, Comm. & Computer	1,682	6,525	7.4%	40.4	80,953	3.7%
Business, Financial & Other	244	2,138	12.1%	36.9	79,009	4.1%

The total payroll bill of foreign-owned firms amounted to €15.7 billion in 2019 with manufacturing accounting for €7.1 billion (45.0%) and services contributing the balance of €8.6 billion (55.0%).

Total payroll per person employed averaged €77,361 in 2019, representing an increase of 1.2% per annum in nominal terms over the period 2000-2019.

Payroll per employee in the Information, Communication and Other Internationally Traded Services sector and the Manufacturing sectors averaged €80,465 and €73,874 respectively in 2019.

The Chemicals sector had the highest average payroll per capita of all sectors in 2019 at €93,437, followed by Information, Computer and Computer Services with €80,953 and Computer, Electronic and Optical at €79,119

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, 2019

	Materials Purchased 2019			Services Purchased 2019		
	Total Materials	Irish Materials	Irish as % of Total	Total Services	Irish Services	Irish as % of Total
	€m	€m	%	€m	€m	%
Total - All Sectors	31,167	3,584	11.5%	138,408	7,987	5.8%
Manufacturing & Other Industry	22,411	3,236	14.4%	31,806	3,057	9.6%
Food & Drink	1,709	849	49.7%	1,942	569	29.3%
Traditional Manufacturing	4,909	584	11.9%	803	351	43.7%
Chemicals	9,247	525	5.7%	23,287	1,269	5.5%
Computer/Electronic/Optical Prod.	3,121	326	10.4%	2,373	242	10.2%
Medical Devices	3,245	951	29.3%	3,346	610	18.2%
Infor./Comm. & Other Services	8,756	348	4.0%	106,601	4,931	4.6%
Information, Comm. & Computer	7,998	253	3.2%	102,670	4,260	4.1%
Business/Financial & Other Services	758	95	12.5%	3,932	671	17.1%

In overall terms, foreign-owned sector spent €31.2 billion on materials, of which €3.6 billion or 11.5% 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 49.7% of all materials purchased were sourced in Ireland. In monetary terms, this amounted to €849 million spent in Ireland in 2019.
- The Medical Devices sector sourced 29.3% of their materials in Ireland.

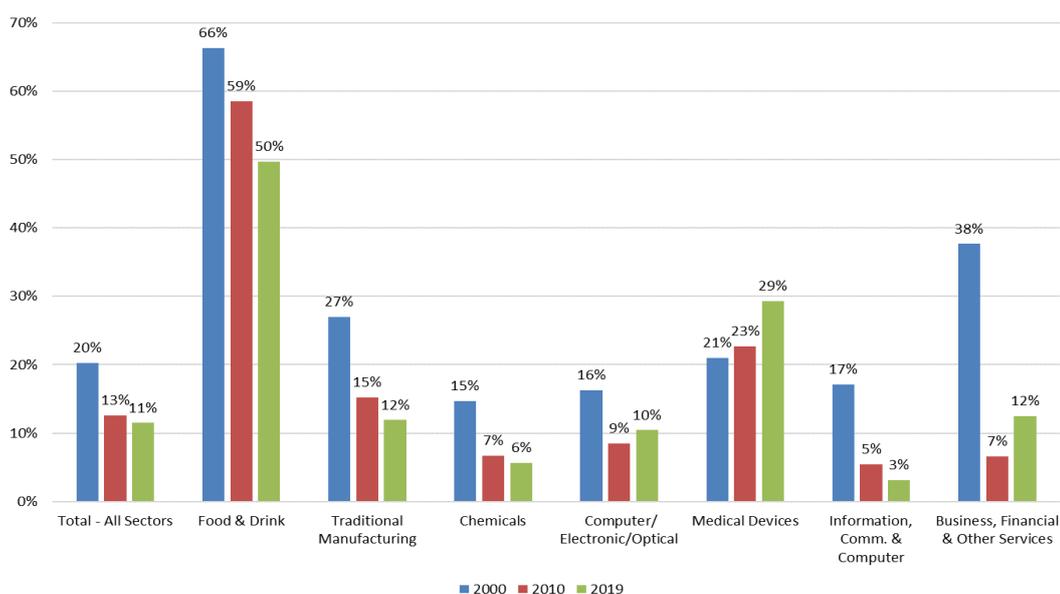
Foreign-owned sector spend, on services sourced in Ireland, amounted to €8.0 billion in 2019 or 5.8% of total services. The total spends on services amounted to €138.4 billion - it should be noted that this figure includes royalty payments.

- The services sector with the highest spend on Irish services was the Information, Communication and Computer sector which spent €4.3 billion or 4.1% of a total spend of €102.7 billion on services in 2019.
- Traditional Manufacturing had the highest proportion on Irish-sourced services at 43.7% 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, 2000-2019



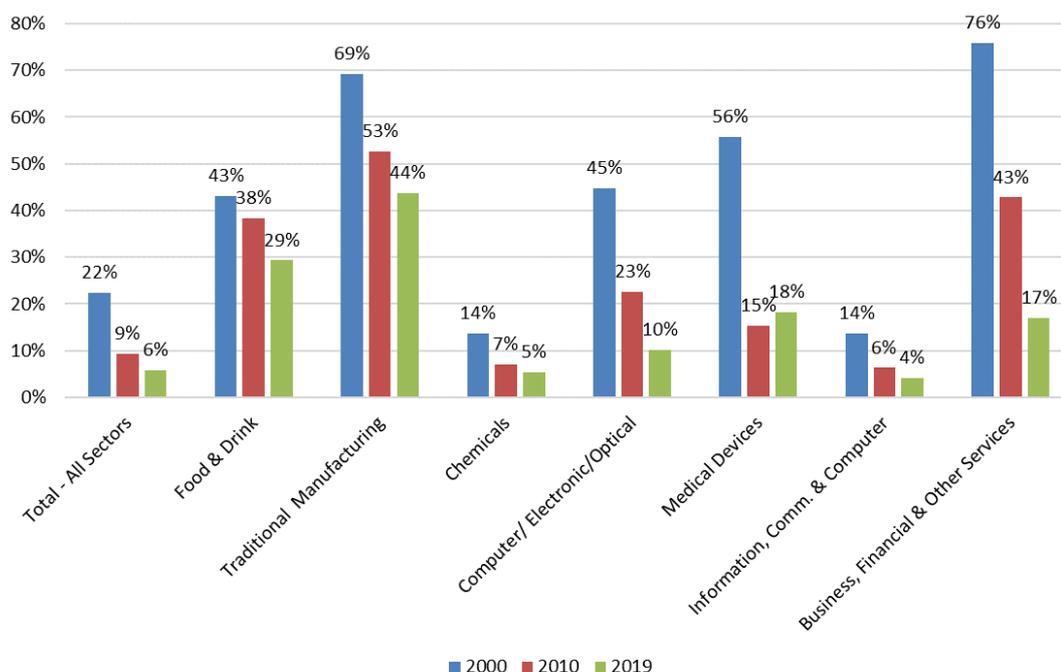
This graph depicts trends in the share of materials purchased by foreign-owned companies that were sourced in Ireland. The trend in the share of materials purchased in Ireland was in decline for all sectors between 2000 and 2010 falling from 20% to 13%. It has since fallen further and now stands at 11% in 2019.

The sector with the largest share of materials purchased in Ireland is the Food & Drink sector with 49%, though this share has dropped from 66% in 2000. (Absolute value €849.3m).

The Traditional Manufacturing sector’s share of Irish materials has decreased steadily over the period of this time-series from 27% in 2000 to 12% in 2019. (Absolute value €584.2m).

The one sector that has increased its share of Irish materials between 2000 and 2019 is the Medical Devices sector going from 21% to 29% (Absolute value was €950.6m).

3.11 Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000-2019

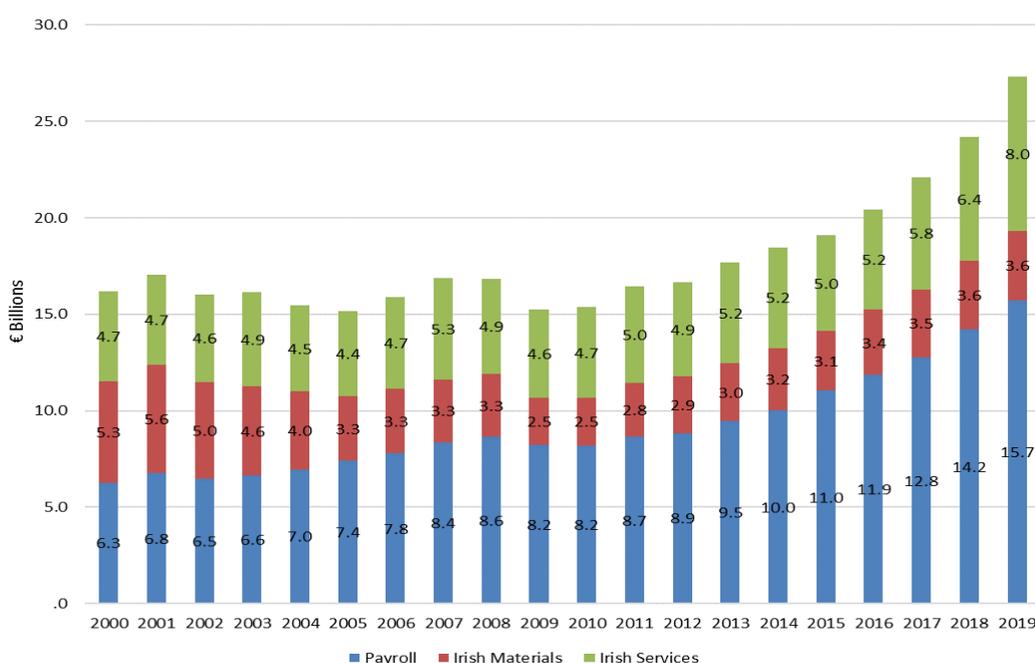


This graph shows the share of total services sourced in Ireland by foreign-owned Manufacturing and Services firms. In 2000, 22% of all services purchased by foreign-owned firms were sourced in Ireland - this figure has declined to 6% in 2019.

- Traditional Manufacturing dropped its share of Irish service purchases from 69% in 2000 to 44% in 2019 but remains the highest performing sector as regards Irish-sourced services. (Absolute value was €351.2 million).

- The Medical Devices sector’s share of services sourced in Ireland dropped from 56% in 2000 to 18% in 2019. (Absolute value was €609.5 million).
- The Computer, Electronic and Optical Products sector has also decreased its share of Irish services purchases from 45% in 2000 to 10% in 2019. (Absolute value €241.7 million).
- The Information, Communications and Computer Services sector’s share of service purchases sourced in Ireland fell from 14% in 2000 to 4% in 2019. (Absolute value 4.3 billion 2019).
- The Food & Drink sector declined from the 2000 figure of 43% to 29% in 2019 (Absolute value €569.3 million).
- The percentage of Irish services purchased by the Chemical sector dropped from 14% in 2000 to 5% in 2019. (Absolute value €1.2 billion).

3.12 Total Direct Expenditure in the Irish Economy by Foreign-Owned Companies, 2000-2019



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 €27.3 billion in 2019, comprising €15.7 billion on payroll, €3.6 billion on materials produced in Ireland and €8.0 billion on services purchased in Ireland.

- Direct expenditure by foreign-owned firms was up 12.9% in 2019 from €24.2 billion in 2018.
- Direct expenditure has increased from €16.2 billion in 2000 and shows an overall nominal increase of 2.8% per annum between 2000 and 2019.

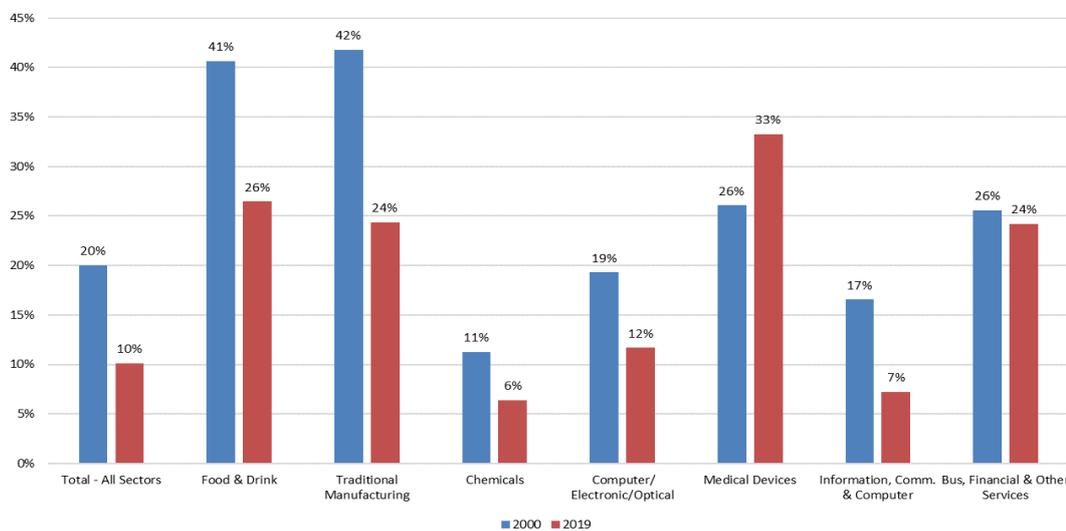
- Over the period 2000 to 2019:
 - Payroll has increased by 5.0% per annum;
 - Expenditure on materials sourced in Ireland has decreased by 2.0% per annum;
 - Expenditure on services sourced in Ireland has increased by 2.9% per annum.

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 2019, payroll accounts for 58% of total expenditure in the Irish economy, with Irish materials and Irish services accounting for 13% and 29% 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, 2000-2019



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 2000-2019.

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 2019.

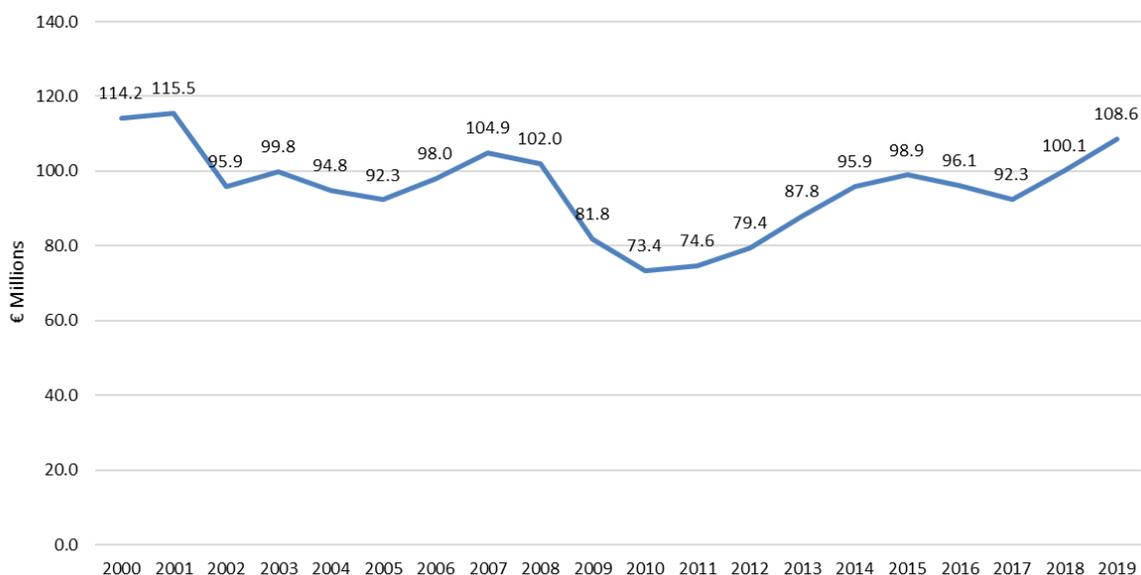
Medical Devices is the only sector to have gone against this aggregate trend. For Medical Devices DEIE/Sales has increased from 26% in 2000 to 33% in 2019 (Value 3.5 billion).

The Information, Communication and Computer Services Sector decreased its Direct Expenditure as a percentage of sales from 17% in 2000 to 7% in 2019. In absolute terms this is the sector with the greatest direct expenditure in the Irish economy with a spend of €11.0 billion in 2019 accounting for 7% of total direct expenditure by foreign firms in the economy in 2019.

The next highest contributor in absolute terms is the Chemicals sector with a total expenditure of €4.1 billion in 2019. This represents 30.9% of sales in the Manufacturing & Other Industry sector in 2019.

Direct Expenditure in Traditional Manufacturing has fallen from 42% in 2000 to 24% in 2019. In absolute terms total expenditure stood at €2.0 billion in 2019.

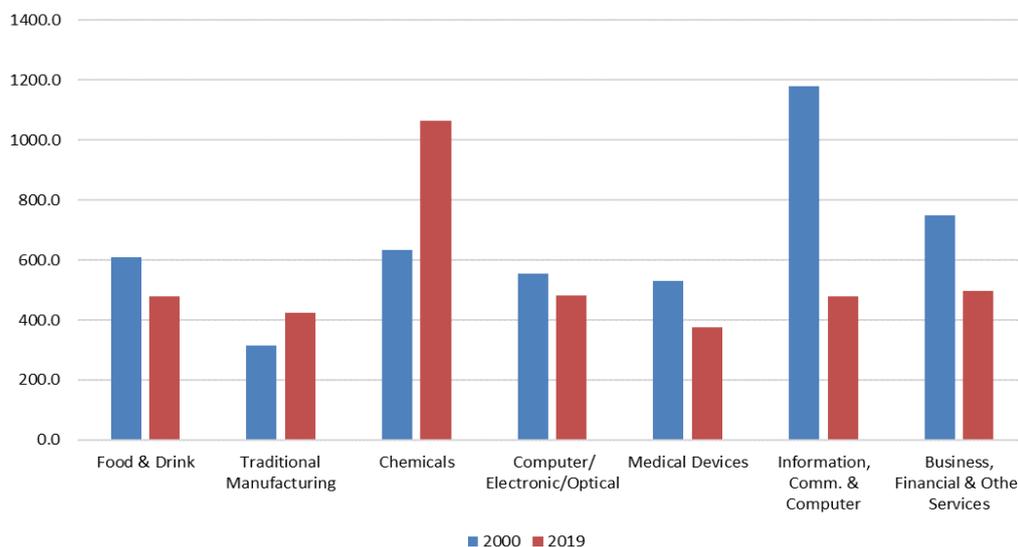
3.14 Formal Structured Training in Foreign-owned Companies, 2000-2019



Total expenditure on structured, formal training in foreign-owned companies in 2019 amounted to €108.6 million. Expenditure on training increased between 2010 and 2015 from a low of €73.4 million in 2010 to reach €98.9 million in 2015. It decreased again to €92.3m in 2017 but has recovered over the two subsequent years with an increase of 8.5% over 2018.

Spending on training has not recovered to the rates reported in the early years of this survey when total funding for training reached €115.5 million in 2001.

Formal Structured Training per person employed in Foreign-owned Companies by Sector, 2000-2019



- The Manufacturing sectors spent €56.6 million or 52.1% of total expenditure on structured training in foreign-owned companies.
 - Within Manufacturing, the chemicals sector is responsible for 24.5% of this expenditure in 2019 at €26.6 million.
- The Services sectors spend on training in 2019 was €52.0 million.
 - The IT services sector spends most on training within Services with €38.6m in 2019 or 74.1% of total services spend in that year.
- Overall expenditure on training per person employed in foreign-owned companies increased from €527.3k in 2018 to €533.9k in 2019. Since 2000 expenditure on training per person employed has dropped from €663.0 in 2000 to €533.9 in 2019.
- The sector with the biggest decline in expenditure on training per person employed was IT Services which declined from €1,119.4 in 2000 to €483.4 in 2019, a drop of 56.8%. Business, Financial and Other Services declined from €818.3 in 2000 to 455.3 in 2019, a decline of 44.4%. Food & Drink declined from €748.3 in 2000 to €497.4 in 2019, a decline of 33.5%.

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 2010:

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 2467 or email abr@insightsc.ie

Annual Business Report 19/20

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

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

Ref no:

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).



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 2018 (€000's)	Actual 2019 (€000's)	Forecast 2020 (€000's)
Q1a - DOMESTIC SALES			
Q1a1 - MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2 - SERVICES	€ <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"/>
Q1b2 - SERVICES	€ <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"/>
---	------------------------	------------------------	------------------------

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

	2018	2019	2020
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.

	2018	2019	2020
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 2018	Actual 2019	Forecast 2020
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).

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 2019	<input type="text"/> %
---	------------------------

What proportion of the value of sales in 2019 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?

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 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 2018, 2019 and your forecasted exports 2020. Please note that the total of these figures **should be the same as those outlined in Q1b**.

	Actual 2018 (€000's)	Actual 2019 (€000's)	Forecast 2020 (€000's)		Actual 2018 (€000's)	Actual 2019 (€000's)	Forecast 2020 (€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			

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 or email abr@insightsc.ie

Q2c - Please specify your top three priority development markets in 2020, i.e. by country.

1) 2) 3)

Q2d - Do you intend to diversify your exports away from the UK in 2020?

Yes
No

Q2e - Please list the markets where you had a physical presence in 2019 (i.e. an office or staff permanently located there).

EMPLOYMENT

Q3a - COMPANY STAFF

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

	Actual 2018	Actual 2019	Forecast 2020
Full-Time: <i>Employed on a full-time basis for at least nine months with the exception of agency workers (see Q3b)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: <i>All other employees with the exception of agency workers (see Q3b), can be part-time, short-term, temporary or other.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL COMPANY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>

FEMALE STAFF

Proportion of female staff in your total company staff in 2019 %

Is the CEO of your company female? Yes
No

Management Team: <i>How many people are there on your management team in 2019, including CEO, senior and middle management?</i>	Total	Of which female
	<input type="text"/>	<input type="text"/>

Q3b - AGENCY STAFF

In addition to company staff in Q3a, please indicate the number of agency staff in the 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 2018	Actual 2019	Forecast 2020
Full-Time: <i>Employed on a full-time basis for at least nine months</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: <i>All other classification of agency worker, can be part-time, short-term, temporary or other.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL AGENCY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>

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 2018	Actual 2019	Forecast 2020
Full-Time Employees Only:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 or email abr@insightsc.ie

EXPENDITURE ITEMS

	Actual 2018 (€000's)	Actual 2019 (€000's)
Q4 - PAYROLL	€ <input type="text"/>	€ <input type="text"/>
<i>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].</i>		
Please record in Q5 to Q7 the costs associated with total sales excluding cost of distribution sales (Q1g) .		
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 and include material-based RD&I costs]</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>		
	Actual 2018 (€000's)	Actual 2019 (€000's)
Q6a - SERVICES	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all bought-in services, e.g. agency fees, professional fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services etc.</i>		
Q6b - SERVICES SOURCED IN IRELAND (%)	<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	€ <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 and depreciation).</i>		
	Actual 2018 (€000's)	Actual 2019 (€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"/>

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 or email abr@insightsc.ie

CORPORATION TAX

Q10 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2018-2021?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid):
	Yes	No	Amount (€000's)
2018 (actual)			
2019 (estimate)			
2020 (forecast)			
2021 (forecast)			

TRAINING

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

Q11 - TRAINING

Actual 2018 (€000's) Actual 2019 (€000's)
 € €

Cost of all formal structured training, in-house and external (excluding salary of those being trained, on-the-job training costs and apprentice training).

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 [click here](#).

Q12a - IN-HOUSE RD&I (NUMBER EMPLOYED)

Actual 2018 Actual 2019

Number of people employed (full time equivalent) on in-house RD&I within your Republic of Ireland operation.

Q12b - RD&I EXPENDITURE (IN-HOUSE)

(€000's) (€000's)
 € €

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.

Q12c - RD&I EXPENDITURE (OUTSOURCED)

€ €

Please estimate the total expenditure incurred by your Republic of Ireland operation on RD&I sub-contracted to other parties

Q12d - OVERALL RD&I EXPENDITURE

€ €

Please combine Q12b and Q12c

Q12e - EXPECTED OVERALL RD&I EXPENDITURE IN 2020

€

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:

	2017	2018	2019
Yes	<input type="text"/>	<input type="text"/>	<input type="text"/>
No	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 or email abr@insightsc.ie

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

Q12i1 - Relationship with Higher Education: Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2019?

- Yes
- No
- Don't Know

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

Please ensure that all monetary amounts are in thousands

For assistance please dial 01-661 2467 or email abr@insightsc.ie

CLIMATE CHANGE AND LOOKING TO THE FUTURE

Q13a - How important is having a climate action response for your business?

	Not important
	Moderately important
	Very important

Q13b - Have you developed a climate action response for your business? Yes
 No

Q13c - What are the main challenges in developing your company's climate action response? *Please rank your top 3 challenges*

	Prioritization/time to consider the climate challenge
	Capacity to develop a plan
	Availability of external supports
	Availability of funding for this investment
	Other, please specify: <input style="width: 450px; height: 20px;" type="text"/>

Q14 - Digitalisation is the process of **leveraging digital data and technologies** to drive business value. How would you **assess your readiness** for the use of established (e.g. data analytics) and emerging (e.g. Artificial Intelligence) digital technologies to this end?

	No digital plan; limited digital initiatives in place
	Starting to Explore digital initiatives for the business
	Defined digital plans in place with activities underway
	Digital Innovation strategy in place with implementation activities underway

Q15 - What are the top 2 challenges facing your business in 2020?

OTHER COMPANIES INCORPORATED IN THIS RETURN

Apart from this company, please list all **OTHER** companies, subsidiary companies and plants included in this return:

Company Name(s)	Address(es)

Thank you very much!

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

Please ensure that all monetary amounts are in thousands

IDA Ireland Questionnaire

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

Annual Business Report 2019/20

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

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



Ref no:

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).

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 2018 (€000's)	Actual 2019 (€000's)	Forecast 2020 (€000's)
EXPORT SALES			
Q1a1) MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2) SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input 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 type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1b2) SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input 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 type="text"/>	€ <input type="text"/>	€ <input type="text"/>
-----------------------------------	------------------------	------------------------	------------------------

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

SALES TO PUBLIC SECTOR

Q1d1) EXPORT SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
-------------------------------------	------------------------	------------------------	------------------------

Estimated percentage of export sales in Q1a attributed to the public sector.

Q1d2) DOMESTIC SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
---------------------------------------	------------------------	------------------------	------------------------

Estimated percentage of domestic sales in Q1b attributed to the public sector.

Q1e - INTER-COMPANY SALES	<input type="text"/> %	<input type="text"/> %	<input 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 type="text"/> %	<input type="text"/> %	<input type="text"/> %
--------------------	------------------------	------------------------	------------------------

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 type="text"/>	€ <input type="text"/>	€ <input type="text"/>
--------------------------	------------------------	------------------------	------------------------

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:

	2018		2019	
	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 2018	Actual 2019	Forecast 2020
Full-Time: Employed on a full-time basis (or on a contract of at least nine months) with the exception of agency workers.	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: All other employees with the exception of agency workers, can be part-time, short-term, temporary or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL COMPANY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>
% Company Staff Earning €40,000+ per annum	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

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 2018	Actual 2019	Forecast 2020
Full-Time: Employed as an agency worker on a full-time basis (or on a contract of at least nine months).	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: All other classification of agency worker, can be part-time, short-term, temporary or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL AGENCY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>
Q3c - GLOBAL EMPLOYMENT	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

Please ensure that all monetary amounts are in thousands

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CURRENT EXPENDITURE

	Actual 2018 (€000's)	Actual 2019 (€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 (Q1g) .		
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 2018	Actual 2019
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 2018 (€000's)	Actual 2019 (€000's)
Q10 - CAPITAL EXPENDITURE	€ <input type="text"/>	€ <input type="text"/>

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.

Please estimate how Capital Expenditure was distributed across the following categories:

	2018	2019
Building & Structures	%	%
Machinery & Equipment	%	%
Other	%	%
Total	100%	100%

CORPORATION TAX

Q11 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2018-2021?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2018 (actual)			
2019 (estimate)			
2020 (forecast)			
2021 (forecast)			

Please ensure that all monetary amounts are in thousands

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RESEARCH, DEVELOPMENT & INNOVATION

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	Actual 2018	Actual 2019
Q12a - IN-HOUSE RD&I EMPLOYMENT		
Q12a1 - RESEARCHERS/TECHNICIANS	<input type="text"/>	<input 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 type="text"/>	<input type="text"/>
<i>Number of support staff employed (full time equivalent) on 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. 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 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. 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 type="text"/>	€ <input type="text"/>
<i>Please estimate the total expenditure on RD&I, i.e. Q12b plus Q12c</i>		
Q12e - PERCENTAGE OF GLOBAL RD&I	<input type="text"/> %	<input 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:

	2017	2018	2019
Yes	<input type="text"/>	<input type="text"/>	<input type="text"/>
No	<input type="text"/>	<input type="text"/>	<input type="text"/>

Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX

The Knowledge Development Box (KDB) was introduced by Finance Act 2016 for companies whose accounting period commences on or after 1 January 2019. 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:

Have applied
 Will apply
 Not relevant to my business

Please ensure that all monetary amounts are in thousands

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 2019?

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 and Internet of Things
b-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security, Privacy, Robotics and Artificial Intelligence (including Machine Learning)
c-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content and Applications, and Augmented Reality and Virtual Reality
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
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"/>	Decarbonising the Energy System
k-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Living
l-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced and Smart Manufacturing
m-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing 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 [here](#).

Please ensure that all monetary amounts are in thousands

