



Rialtas na hÉireann  
Government of Ireland

# Annual Business Survey of Economic Impact (ABSEI) 2022

Prepared by the Department of Enterprise, Trade and Employment

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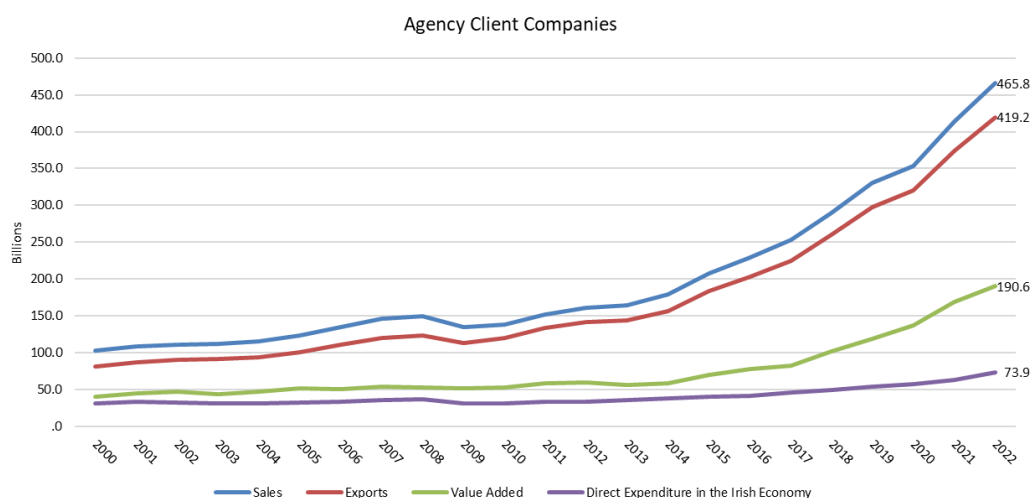
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## Executive Summary

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 Ireland<sup>1</sup> 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), 2000-2022



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 2022.

Agency client companies reported a rise in sales and exports in 2022 over the previous year. This continues a substantial upward trend in results following the downturn in the economy in 2009.

- Total sales amounted to €465.8 billion in 2022 which represents an increase of 12.5% in current prices on the previous year's figure of €414.1 billion.
- Total exports in 2022 amounted to €419.2 billion, an increase of 12.0% on the previous year of €374.4 billion.
- Value added (sales less materials and services costs) has also increased over this time-series and in 2022 amounted to €190.6 billion, up 13.0% on the previous year with 88.9% of this value being generated in foreign owned firms.
- Direct Expenditure in the Irish Economy (Payroll, Irish Materials, Irish Services) has increased over 2021 by 16.6% to €73.9 billion in 2022.

<sup>1</sup> 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.

## E.2 Summary Table of Key Business Indicators (current prices), 2022

	2022 (€bn)			Share of Total 2022		
	Foreign-owned	Irish-Owned	All	Foreign-owned	Irish-Owned	All
Sales	403.5	62.3	465.8	86.6%	13.4%	100%
Exports	386.3	33.0	419.2	92.1%	7.9%	100%
Value Added	169.3	21.2	190.6	88.9%	11.1%	100%
Direct Expenditure	38.1	35.9	73.9	51.5%	48.5%	100%

Note: Rounding may affect totals

This table shows sales, exports, value added and direct expenditure for 2022 by ownership.

- Total sales for agency-assisted companies in 2022 amounted to €465.8 billion.
  - Foreign-owned companies account for €403.5 billion, an increase of 11.3% over the previous year. This represents 86.6% of total sales by Agency clients in 2022.
  - Sales for Irish-owned firms increased by 20.5% between 2021 and 2022, amounting to €62.3 billion or 13.4% of total sales.
- Total exports for agency clients amounted to €419.2 billion in 2022, a 12.0% increase over 2021 exports, with €386.3 billion exports by Foreign-owned companies and €33.0 billion exports by Irish-owned companies in 2022.
- Value added was €190.6 billion in 2022 with 88.9% of this value being generated in foreign owned firms.
- Irish owned client companies have €35.9 billion of direct expenditure in the Irish economy compared with €38.1 billion for foreign owned companies.

**E.3 Export Intensity of Irish and Foreign-owned Companies, 2000-2022**

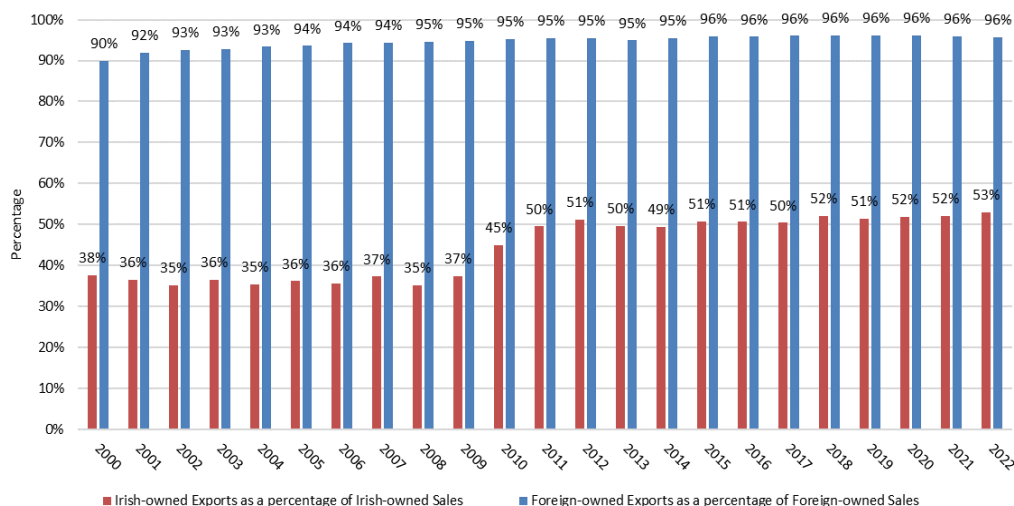
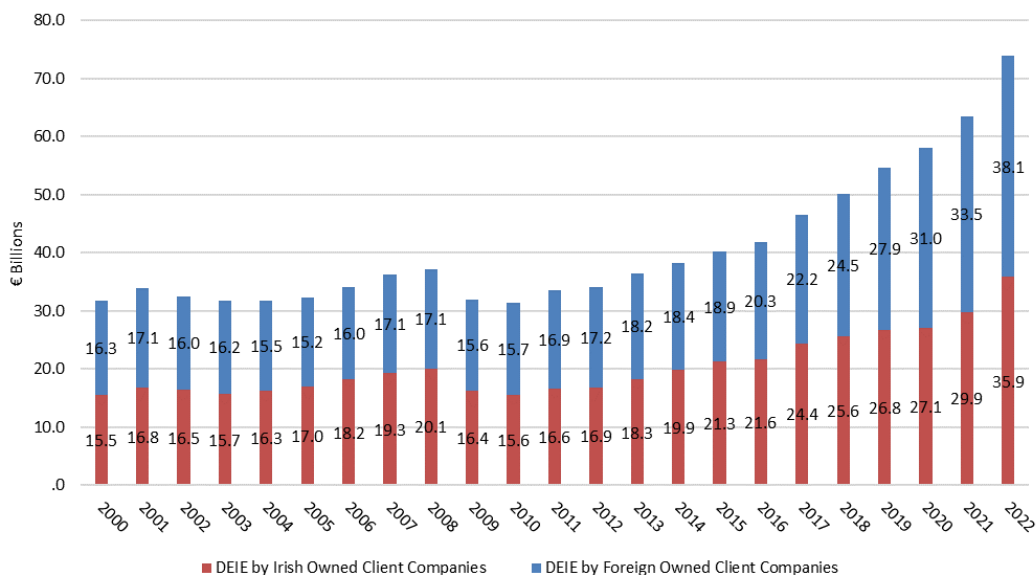


Figure E.3 above illustrates the export intensity (exports as a percentage of total sales) of Irish-owned and Foreign-owned firms over the period 2000 to 2022.

- Irish-owned firms have increased their export intensity from 38% in 2000 to 53% intensity in 2022.
- The vast majority of products and services produced by foreign-owned firms are destined for export, with an export intensity of 96% in 2022, at this constant level since 2015.

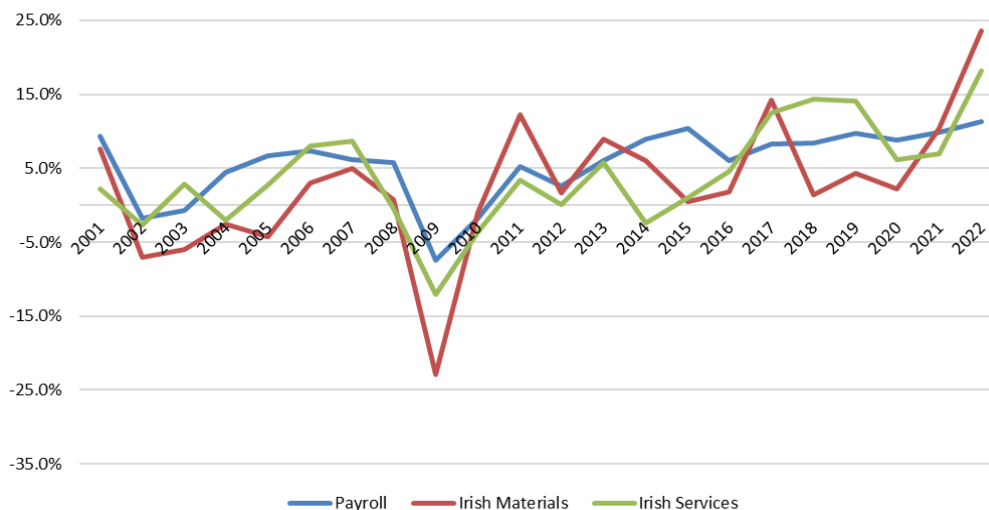
**E.4 Direct Expenditure in the Irish Economy (DEIE) by Ownership, 2000-2022**



In 2022, Direct Expenditure in the Irish Economy (DEIE) by agency-assisted firms amounted to €73.9 billion and is the highest level of direct expenditure in the twenty-three years of this time-series.

Irish-owned client companies spent approximately €35.9 billion in the Irish economy in terms of payroll and purchases of Irish materials and Irish services. Foreign owned clients spent €38.1 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, 2000-2022**



In 2022, there was an increase in payroll and purchases of Irish materials and services over the 2021 figures. There was an increase in the purchases of Irish materials of 23.6% and Irish services of 18.3% and of payroll payments of 11.3%.

**E.6 Direct Expenditure as Percentage of GNP<sup>2</sup> in Irish/foreign-owned companies, 2000, 2013 and 2022**

	Irish			Foreign		
	2000	2013	2022	2000	2013	2022
<b>All Sectors</b>	16.7%	12.1%	9.9%	17.4%	12.1%	10.5%
<b>Manufacturing &amp; Other Industry</b>	14.8%	10.0%	8.1%	12.3%	7.1%	4.7%
<b>Infor., Comm. &amp; Other Services</b>	1.9%	2.1%	1.8%	5.2%	5.0%	5.8%

- In 2022, the Direct Expenditure (payroll and purchases of Irish materials & services) of Irish-owned firms in the Irish economy amounted to 9.9% of Ireland’s Gross National Product (GNP). In 2000, this figure was 16.7% and 12.1% in 2013, as growth in direct expenditure did not keep pace with growth in GNP.

<sup>2</sup> Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2013 = €150.3bn / 2022 = €362.8bn.

Source: CSO, Database: NAQ03 Gross national product at current market prices.

- Direct Expenditure of the Irish-owned Manufacturing sectors as a percentage of GNP reduced from 14.8% to 10.0% between 2000 and 2013 and decreased in 2022 to 8.1%. The Services sectors has reduced from 1.9% of GNP in 2000 to 1.8% and 2022.
- Direct Expenditure by foreign-owned firms as a percentage of GNP stands at 10.5% in 2022 down from 17.4% in 2000.
  - Direct Expenditure as a percentage of GNP in the foreign-owned Information, Communication & Internationally-Traded Services sectors was at 5.2% in 2000. In 2013 it decreased to 5.0% before increasing to 5.8 in 2022. The manufacturing sectors have decreased their share from 12.3% in 2000 to 4.7% in 2022.

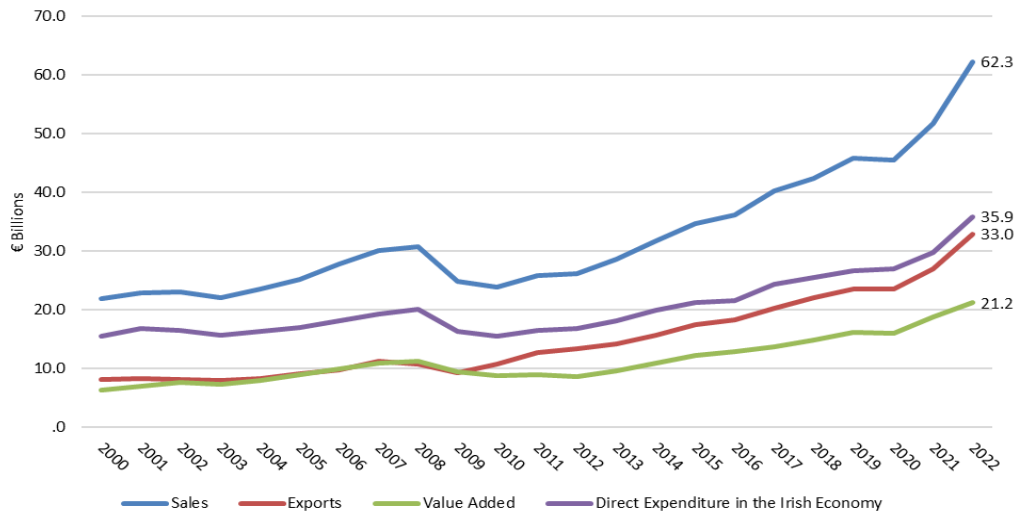
**E.7 Value Added as percentage of GNP in Irish/foreign-owned companies, 2000, 2013 and 2022**

	Irish			Foreign		
	2000	2013	2022	2000	2013	2022
<b>All</b>	6.9%	6.4%	5.9%	36.9%	31.5%	46.7%
<b>Manufacturing &amp; Other Industry</b>	5.0%	4.0%	3.9%	26.2%	18.7%	19.0%
<b>Infor., Comm. &amp; Other Services</b>	1.9%	2.4%	2.0%	10.7%	12.8%	27.7%

- 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 5.9% in 2022.
  - While the manufacturing sectors have seen value added decreased between 2000 and 2022 from 5.0% to 3.9%, the services sectors have increased their percentage share of GNP from 1.9% in 2000 to 2.0% in 2022.
- For foreign-owned companies, value added as a percentage of GNP decreased from 36.9% in 2000 to 31.5% in 2013 before increasing to 46.7% in 2022.
  - The Services sectors have increased value added from their 2000 level of 10.7% of GNP to 27.7% of GNP in 2022.
  - The Manufacturing sectors have decreased value added as a percentage of GNP from 26.2% in 2000 to 19.0% in 2022.

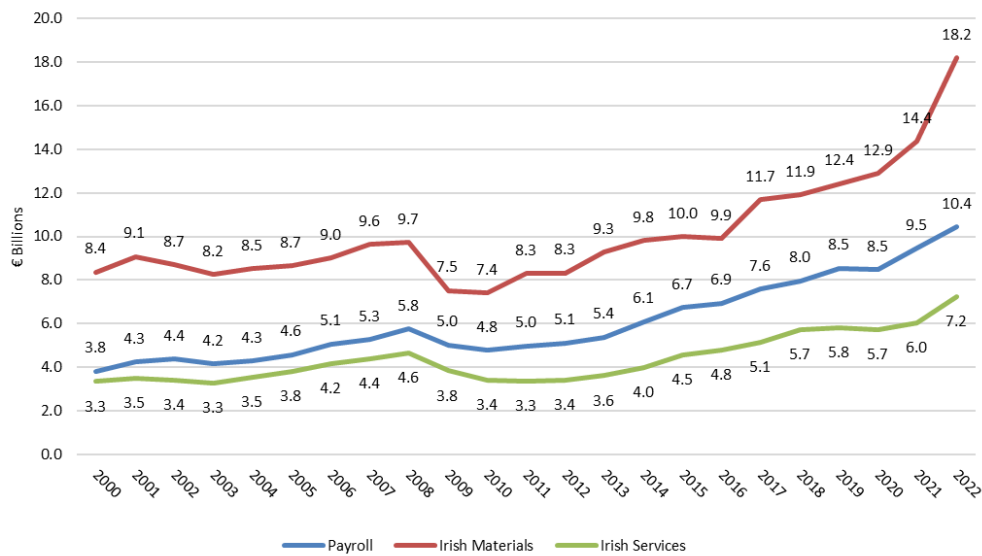


**E.8 Key Business Indicators for Irish-Owned Companies, 2000-2022 (current prices)**



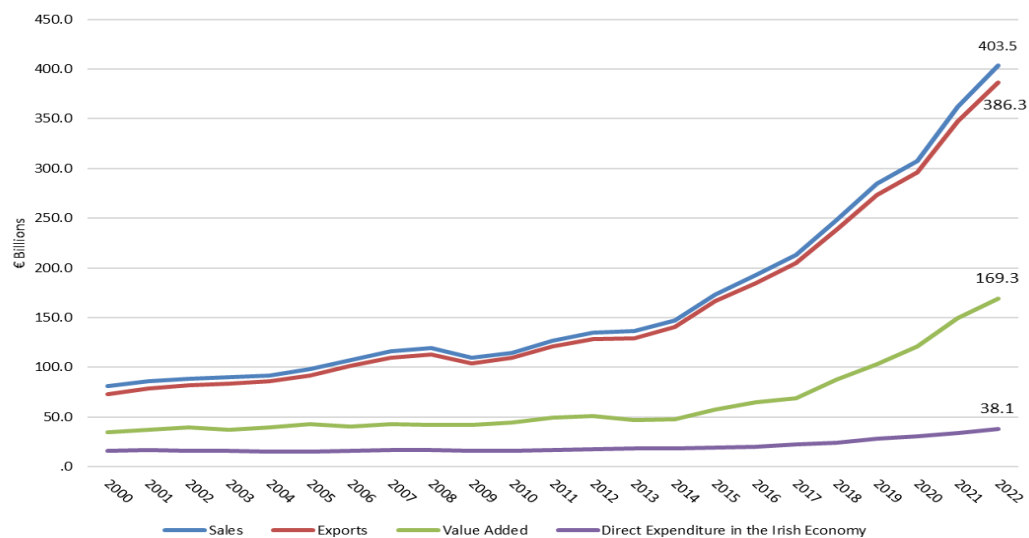
- Sales by Irish owned firms in 2022 showed an increase of 20.5% on the previous year. Total sales stood at €62.3 billion in 2022.
- Exports were also up for Irish firms in 2022 over 2021 with growth of 22.3% and amounted to €33.0 billion in 2022.
- Value-added and direct expenditure have also continued their upward trend with value added at €21.2 billion (up 13.1%) and direct expenditure reaching €35.9 billion (up 20.0%) in 2022.

**E.9 Direct Expenditure in the Irish Economy for Irish-owned client’s companies, 2000-2022**



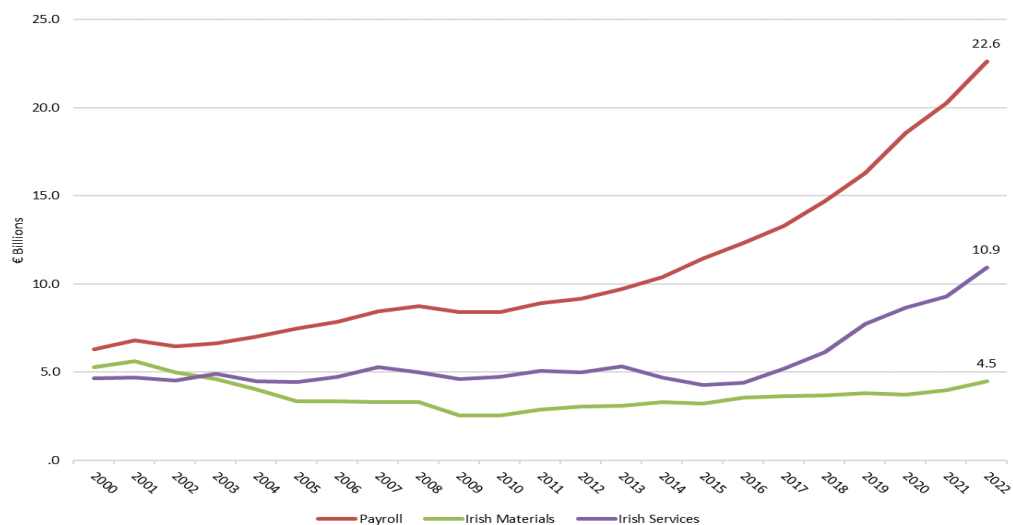
- Irish-owned firms spent €35.8 billion in 2022 in the Irish economy with the largest proportion of this expenditure being on Irish materials. The breakdown of expenditure in 2022 was €10.4 billion on payroll, €18.2 billion on Irish raw materials and €7.2 billion on Irish services.

**E.10 Key Business Indicators for Foreign-Owned Companies, 2000-2022 (current prices)**



- Sales by foreign-owned companies have increased by 11.3% and exports by 11.2% in 2022 over 2021 to €403.5 billion and €386.3 billion respectively. On a per annum basis between 2000 and 2022, sales increased by 7.6% and exports by 7.9%.
- Value added increased by 13.0% between 2021 and 2022 to €169.3 billion.
- Direct expenditure reached €38.1 billion in 2022, a 13.5% increase over the previous year.

**E.11 Direct Expenditure in the Irish Economy by Foreign-owned companies, 2000-2022**



- Foreign firms spend less on Irish materials and more on payroll and Irish services than Irish firms. In 2022, direct expenditure by foreign firms amounted to €38.1 billion, comprising €22.6 billion on payroll, €10.9 billion on services purchased in Ireland and €4.5 billion on materials purchased in Ireland.

## Chapter 1: Introduction

### 1.1 Background

This report presents the findings of the Annual Business Survey of Economic Impact for 2022.

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-three years (2000-2022 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 system<sup>3</sup>.
- Fieldwork was carried out throughout 2022/2023.
- All figures in this report are in nominal values (current prices).
- Compound Annual Growth Rate (CAGR). Throughout this report the percentage change between 2000-2013 and 2000-2022 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.

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<sup>3</sup> 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, 2000-2022

Aggregated data from the Annual Business Survey is available for the period 2000-2022. 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-2022.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 by<sup>4</sup>:

- 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 ISSCOP in ABSEI

As outlined in its Statement of Strategy 2022-2023 document, the Department of Enterprise, Trade and Employment is committed to upholding its values of independence, equality, integrity, and impartiality, and to maintaining the highest standards of professionalism, honesty, objectivity and quality. The Department has signed a statement of commitment<sup>5</sup> to the principles set out in the Irish Statistical System Code of Practice (ISSCOP)<sup>6</sup>. In subscribing to these principles, the Department demonstrates its commitment to improving trust and confidence in the independence, integrity and accountability of the Statistical System and in the credibility and quality of the statistics that we produce and disseminate.

A new webpage on the Department’s website has been created to outline the controls in relation to quality and methodology that are in place for the ABSEI and AES surveys. A link to this webpage is provided here. This webpage outlines the Department’s policies in relation to statistical quality, confidentiality, revisions, access to data and dissemination of results. It includes greater detail on methodology and lists the quality assurance mechanisms that are in place.

In addition to the new webpage on quality and methodology, we have undertaken several steps to improve the quality of surveys and to bring them in line with the specifications of ISSCOP. A process map has been produced which is aligned with the General Statistical Business Process Model (GSBPM). We are implementing more rigorous statistical disclosure controls to protect the confidentiality of our data suppliers, including greater aggregation of classifications as well as primary and secondary cell suppression. Additional measures have been put in place to ensure that survey outputs are accessible to and reusable by the widest possible audience.

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<sup>4</sup> A regional split is also available in the CSV files published with the report.

<sup>5</sup> Statistical quality and methodology for AES and ABSEI surveys - DETE (enterprise.gov.ie)

<sup>6</sup> <https://www.isscop.ie/>

### 1.5 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.

For further information on this survey please contact:

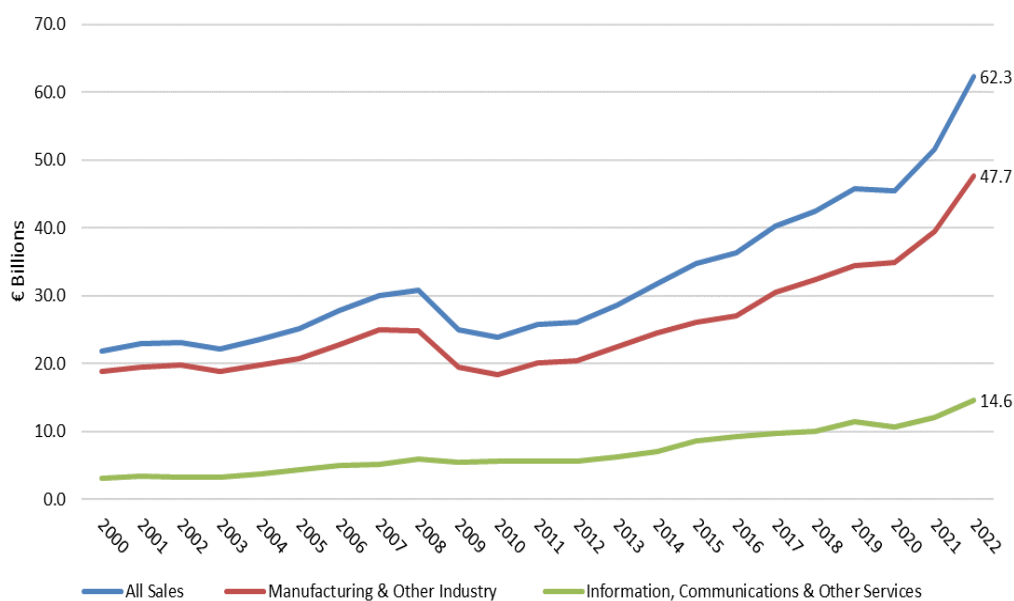
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### Acknowledgement

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, 2000-2022



This graph shows the total level of sales achieved by Irish-owned companies during the twenty-three 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 2022, stood at €62.3 billion for all manufacturing and services companies and is the highest level of sales recorded over the course of this survey. This represents an 20.5% increase over the 2021 figure of €51.7 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 €19.4 billion and to €18.3 billion in 2010. Sales in manufacturing companies have recovered in each of the past eleven years and in 2022 sales amounted to €47.7 billion at current prices, their highest ever level.
- Sales in the services sectors returned an increase of 20.1% in 2022 when compared to 2021. In 2022 sales in the service sectors amounted to 14.6 billion.



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

	2000	2013	2021	2022	Per Annum Change 2000-22	Per Annum Change 2013-22	Per Annum Change 2021-22
	€m	€m	€m	€m	%	%	%
<b>Total All Sectors</b>	<b>21,932</b>	<b>28,610</b>	<b>51,693</b>	<b>62,303</b>	<b>4.9%</b>	<b>9.0%</b>	<b>20.5%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>18,799</b>	<b>22,409</b>	<b>39,526</b>	<b>47,695</b>	<b>4.3%</b>	<b>8.8%</b>	<b>20.7%</b>
Food, Drink & Primary Production	9,235	12,435	18,092	22,873	4.2%	7.0%	26.4%
Traditional Manufacturing	5,870	5,649	9,286	10,577	2.7%	8.4%	13.9%
Modern Manufacturing	1,202	1,603	3,292	3,636	5.2%	9.5%	10.5%
Energy, Water, Waste, Construction	2,492	3,255	8,857	10,609	6.8%	14.0%	19.8%
<b>Infor, Comm. &amp; Other Services</b>	<b>3,133</b>	<b>6,201</b>	<b>12,167</b>	<b>14,608</b>	<b>7.2%</b>	<b>10.0%</b>	<b>20.1%</b>
Information, Comm. & Computer	1,223	2,065	3,972	4,726	6.3%	9.6%	19.0%
Bus., Financial & Other Services	1,910	4,136	8,195	9,882	7.8%	10.2%	20.6%

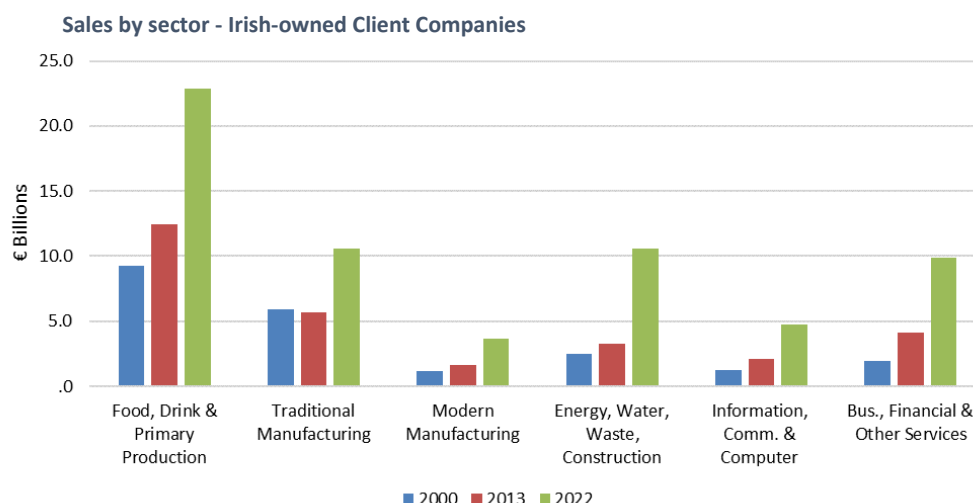
Total sales of Irish-owned manufacturing and service companies amounted to €62.3 billion in 2022 representing an 20.5% increase over the previous year's figures. In 2022, there was an increase in sales of 20.7% in the Manufacturing sector and an increase of 20.1% in Services sector.

The largest sector for Irish-owned clients is the Food, Drink & Primary Production sector with sales of €22.8 billion in 2022 – an increase of 26.4% over 2021 and of 4.2% per annum increase over the 2000 figure of €9.2 billion.

Traditional Manufacturing saw an increase in sales of 13.9% over 2021 with sales of €10.5. billion. There has been a per annum increase of 2.7% over the 2000 figure of €5.9 billion.

Modern Manufacturing increased by 10.5% in 2022 to reach €3.6 billion.

Information, Communications & Other Services increased by 20.1% over 2021 to €14.6 billion and had a per annum increase of 7.2% from the 2000 figure. The Business & Financial & Other sector also increased sales to €9.9 billion in 2022 from €8.2 billion in 2021. This represented an annualised increase of 7.8% since 2000.



**2.3 Changing Composition of Sales and Employment in Irish-owned Client Companies, 2000 and 2022**

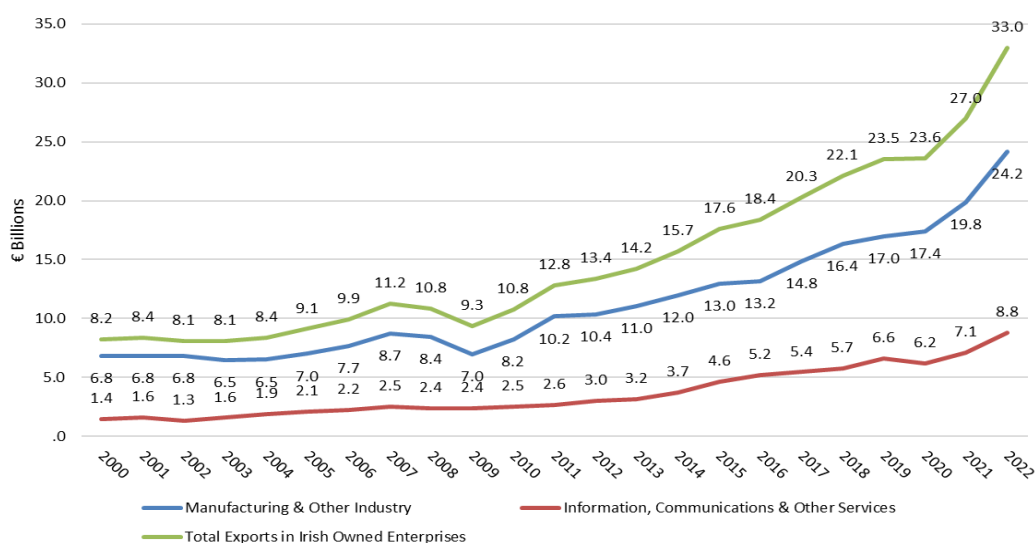
	Sales		Employment	
	2000	2022	2000	2022
<b>Manufacturing &amp; Other Industry</b>	<b>85.7%</b>	<b>76.6%</b>	<b>81.6%</b>	<b>67.2%</b>
Food & Drink	42.1%	36.7%	29.6%	24.8%
Traditional Manufacturing	26.8%	17.0%	39.8%	23.8%
Modern Manufacturing	5.5%	5.8%	7.9%	7.6%
Energy, Water, Waste, Construction	11.4%	17.0%	4.3%	11.1%
<b>Information, Communications &amp; Other Services</b>	<b>14.3%</b>	<b>23.4%</b>	<b>18.4%</b>	<b>32.8%</b>
Information, Communications & Computer	5.6%	7.6%	9.0%	13.7%
Business, Financial & Other Services	8.7%	15.9%	9.4%	19.0%

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 2022.

- 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 76.6% in 2022. The Food, Drink & Primary Production sector dropped its share of sales over this period from 42.1% of total Irish-owned sales to 36.7%. The Traditional Manufacturing sector accounted for 17.0% of total sales in 2022 down from 26.8% in 2000.
- The share of sales accounted for by Information, Communication and Other Services has increased from 14.3% in 2000 to 23.4% in 2022, highlighting the increasing importance of these sectors. Within this the Business, Financial and Other Services sector almost doubled its share of sales from 8.7% to 15.9% over the period 2000-2022.
- While the Food, Drink & Primary Production sector accounted for 36.7% of the sales in Irish-owned industry in 2022, it accounts for 24.8% of the employment. Traditional Manufacturing has witnessed its share of employment drop from 39.8% in 2000 to 23.8% in 2022 while the Energy, Water, Waste & Construction sectors have increased their employment from 4.3% to 11.1%.

- Overall, the Information, Communication and Other Services sector continues to see its share of Irish-owned employment rise significantly from 18.4% in 2000 to 32.8% in 2022.
- The Business, Financial and Other Services sector has increased its share of Irish owned employment from 9.4% to 19.0% in 2023.

**2.4 Exports in Irish-owned Client Companies, 2000-2022**



This graph shows the level of exports by agency-assisted Irish-owned companies during the twenty-three years of this survey and shows the upward trend in the level of exports since 2010 and exports amounted to €33.0 billion in 2022.

Exports from the Irish-owned Manufacturing sectors in 2022 amounted to €24.2 billion, which represented 73.3% of all exports in that year. Service exports at €8.8 billion in same year represent 26.7% of total exports.

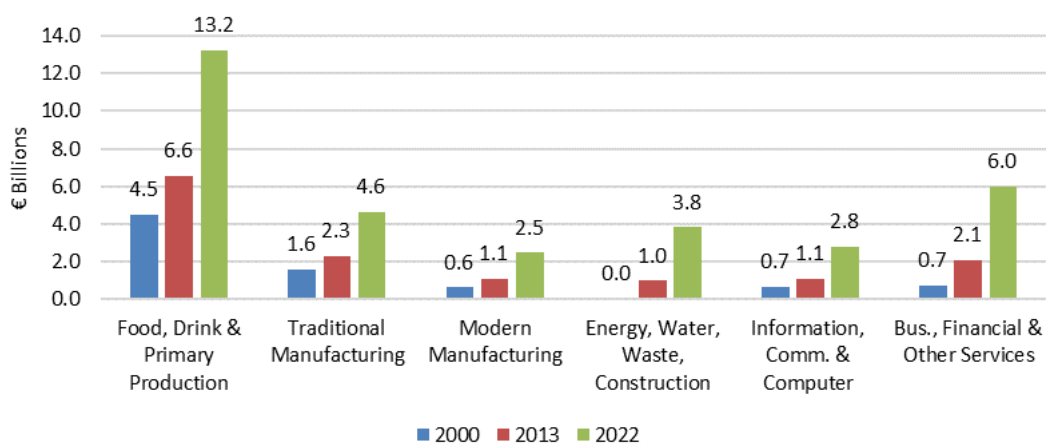
- Total exports in 2022 stood at €33.0 billion for all Manufacturing and Services companies and is the highest level of exports recorded over the course of this survey. This represents a 5.5% per annum change over the 2000 figure of €8.2 billion.
- In the Manufacturing sector, exports have increased steadily since a low in 2009 of €7.0 billion and amounted to €24.2 billion in 2022. This represents a 5.0% per annum increase on the 2000 figure of €6.8 billion and an 9.1% average per annum increase over the figure in 2013 of €11.0 billion. Exports in the Manufacturing sectors increased by 21.8% in 2022 over 2021.
- The value of exports in the Services sector amounted to €1.4 billion in 2000 and has consistently grown in the intervening years to €8.8 billion by 2022. This represents a per annum change of 7.6% between the 2000 and 2022 export figures. Services exports grew by 23.6% between 2021 and 2022.

2.5 Exports by Sector in Irish-owned Companies, 2000, 2013, 2021 and 2022

	2000	2013	2021	2022	Per Annum Change 2000-22	Per Annum Change 2013-2022	Per Annum Change 2021-22
	€m	€m	€m	€m	%	%	%
<b>Total - All Sectors</b>	<b>8,243</b>	<b>14,190</b>	<b>26,956</b>	<b>32,970</b>	<b>6.5%</b>	<b>9.8%</b>	<b>22.3%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>6,815</b>	<b>11,022</b>	<b>19,841</b>	<b>24,173</b>	<b>5.9%</b>	<b>9.1%</b>	<b>21.8%</b>
Food, Drink & Primary Production	4,515	6,563	10,369	13,206	5.0%	8.1%	27.4%
Traditional Manufacturing	1,616	2,330	4,089	4,646	4.9%	8.0%	13.6%
Modern Manufacturing	637	1,123	2,191	2,489	6.4%	9.2%	13.6%
Energy, Water, Waste, Construction	46	1,006	3,192	3,832	22.3%	16.0%	20.1%
<b>Infor., Comm. &amp; Other Services</b>	<b>1,429</b>	<b>3,168</b>	<b>7,115</b>	<b>8,797</b>	<b>8.6%</b>	<b>12.0%</b>	<b>23.6%</b>
Information, Comm. & Computer	679	1,091	2,297	2,802	6.7%	11.1%	22.0%
Bus., Financial & Other Services	750	2,077	4,818	5,995	9.9%	12.5%	24.4%

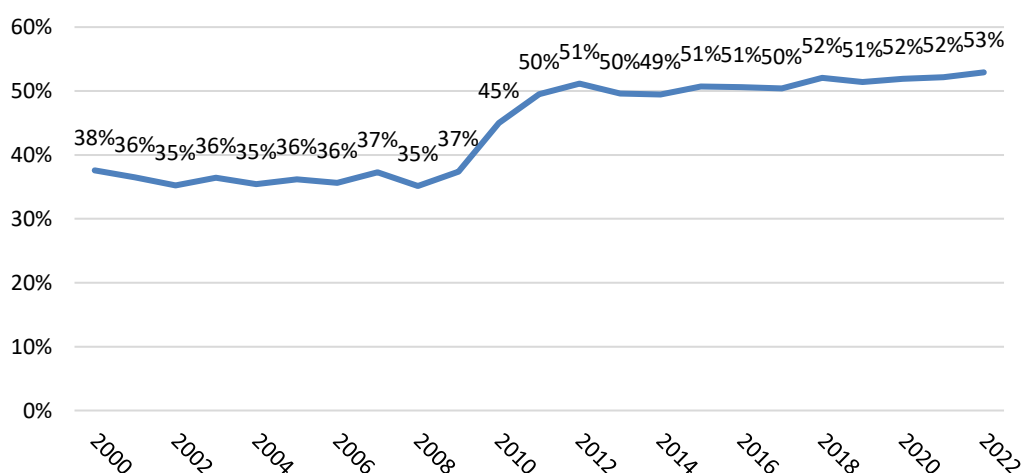
This table provides an overview of the export performance within the Irish-owned client companies in Manufacturing and Information, Communications and Other Services sectors.

Exports by Sector in Irish-owned Companies, 2000, 2013, 2022



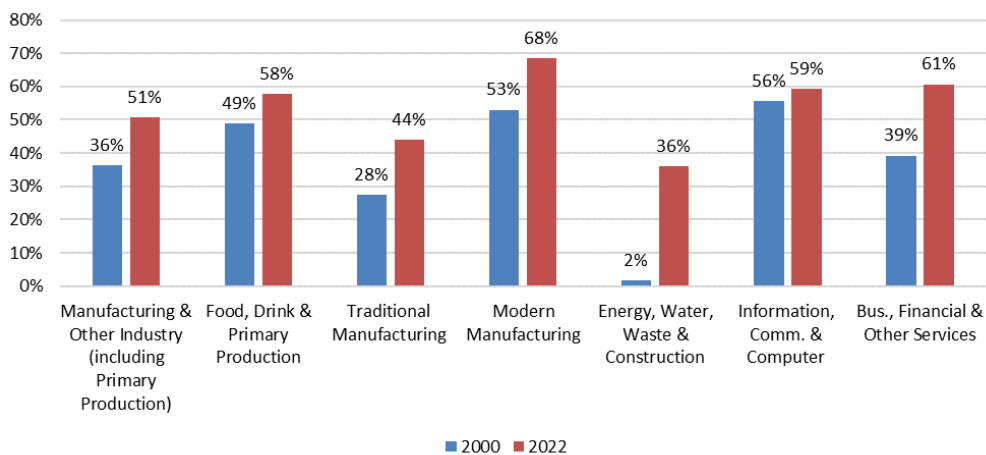
- The Food, Drink & Primary Production sector accounted for 40.1% of all exports of Irish-owned client firms in 2022. This sector has increased exports from €4.5bn in 2000 to €13.2bn in 2022, a per annum increase of 5.0% in current prices.
- Exports in Traditional Manufacturing increased by 13.6% in 2022 over 2021 to €4.6 billion and now accounts for 14.1% of total exports.
- Modern Manufacturing reported an increase of 13.6% to €2.5 billion in 2022 compared to 2.2 billion in 2021. Modern Manufacturing accounts for 7.6% of Irish-owned firms total exports.
- The Energy, Water, Waste & Construction sector increased by 20.1% to €3.8 billion in the year to 2022 with 98.9% of this increase being in the construction sector. Energy, Water, Waste & Construction accounts for 11.6% of total exports.
- Exports of Information, Communication & Other services among Irish-owned firms reported an annual increase of 8.6% to stand at €8.8 billion in 2022. Exports of Information, Communication & Computer services returned a per annum growth of 6.7% since 2000 and this sector now accounts for 8.5% of total exports.
- In 2022, the Business, Financial and Other Services sectors exports increased by 24.4% when compared to 2021. Exports in this sector amounted to €6.0 billion and the sector now accounts for 18.2% of total exports.

2.6 Exports as a percentage of Total Sales in Irish-owned Companies, 2000–2022



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 50% in the last ten years. The above graph shows that the total export intensity of Irish-owned industry has increased from 38% in 2000 to 53% in 2022 and highlights the growing importance to Irish businesses of export markets.

**2.6 Exports as a percentage of Total Sales in Irish-owned Companies by Sector, 2000 and 2022**



This chart compares the export intensity of Irish-owned industry by sector for 2000 and 2022.

- The Food, Drink & Primary Production sector accounted for 36.7% of all export sales by Irish-owned companies in 2022 and has an export intensity of 57.7% in 2022, which is an increase on its 2000 intensity ratio of 48.9%.
- The sectors with the highest export intensity at 68.5% in 2022 are in Modern Manufacturing (Chemicals, Medical Devices and Computer, Electronic & Optical Products).
- The Business, Financial and Other Services sectors are next with 60.7% of all sales being exported in 2022, compared with 39.2% in 2000.

2.7 Value Added in Irish-Owned Companies, 2000-2022

	Total Value Added			Value Added as % of Sales		Value Added per Person Employed		
	2000	2022	Per Annum Change 2000-22	2000	2022	2000	2022	Per Annum Change 2000-22
	€m	€m	%	%	%	€k	€k	%
<b>Total - All Sectors</b>	<b>6,422</b>	<b>21,242</b>	<b>5.6%</b>	<b>25.6%</b>	<b>27.6%</b>	<b>46.3</b>	<b>116.4</b>	<b>4.5%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>4,651</b>	<b>14,097</b>	<b>5.2%</b>	<b>28.5%</b>	<b>38.0%</b>	<b>43.4</b>	<b>137.6</b>	<b>5.6%</b>
Food & Drink	1,438	4,370	5.2%	15.6%	19.1%	35.1	96.5	4.9%
Traditional Manufacturing	2,112	4,335	3.3%	36.0%	41.0%	38.3	100.0	4.7%
Modern Manufacturing	402	1,595	6.5%	33.4%	43.9%	36.5	115.5	5.6%
Energy, Water, Waste, Construction	699	3,797	8.0%	28.1%	35.8%	117.7	187.3	2.2%
<b>Info./Comm./ Other Services</b>	<b>1,771</b>	<b>7,145</b>	<b>6.5%</b>	<b>56.5%</b>	<b>48.9%</b>	<b>69.5</b>	<b>119.5</b>	<b>2.6%</b>
Information, Comm. & Computer	673	2,909	6.9%	55.0%	61.6%	54.1	116.2	3.7%
Business, Fin. & Other Services	1,098	4,236	6.3%	57.5%	42.9%	84.2	121.9	1.8%

- 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 €21.2 billion in 2022. Total value added is estimated to have grown by 5.6% per annum in nominal terms over the period 2000-2022.

- Across all Irish-owned Manufacturing and Information, Communication and Other Services sectors, value added as a percentage of sales has decreased from 56.5% in 2000 to 48.9% in 2022.
- Overall, value added per person employed in Manufacturing and Information, Communication and Other Services is estimated at €116,400, an increase of 4.5% 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 2022

	Total Payroll			Payroll per Employee		
	2000	2022	Per annum change 2000-22	2000	2022	Per annum change 2000-22
	€m	€m	%	€k	€k	%
<b>Total - All Sectors</b>	3,821	10,445	4.7%	27.6	57.2	3.4%
<b>Manufacturing &amp; Other Industry</b>	3,011	6,518	3.6%	28.1	63.6	3.8%
Food, Drink & Primary Production	1,082	2,164	3.2%	26.4	47.8	2.7%
Traditional Manufacturing	1,341	2,252	2.4%	24.3	51.9	3.5%
Modern Manufacturing	269	793	5.0%	24.4	57.4	4.0%
Energy, Water, Waste, Construction	319	1,309	6.6%	53.7	64.6	0.8%
<b>Info./ Comm./Other Services</b>	810	3,927	7.4%	31.8	65.7	3.4%
Information, Comm./ Computer	479	1,792	6.2%	38.5	71.6	2.9%
Business, Financial & Other Services	331	2,135	8.8%	25.4	61.4	4.1%

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 €10.4 billion in 2022.

Total payroll has increased at a rate of 4.7% per annum over the period 2000-2022. Payroll in the Manufacturing sector and the Information, Communication and Other Services sector increased from €3.8 billion in 2000 to €10.4 billion in 2022. Manufacturing and Other Industry firms accounts for 62.4% (€6.5 billion) of total payroll. The Information, Communication and Other Internationally Traded Services firms account for 37.6% (€3.9 billion) in 2022.

Payroll per employee in Irish-owned Manufacturing and Information, Communication and Other Services sectors averaged at €57,224 in 2022, representing an increase of 3.4% per annum over the period 2000 to 2022.



- In the Manufacturing & Other Industry sector, payroll per employee increased from €28,090 in 2000 to €63,611 in 2022. This is a per annum increase of 3.8%.
- In the Information, Communication and Other Services sectors, payroll per employee increased by 3.4% per annum going from €31,782 in 2000 to €65,676 in 2022.
- The highest average payroll per employee figure in 2022, was €71,584 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, 2022

	Materials Purchased 2022			Services Purchased 2022		
	Total Materials	Irish Materials	Irish as % Total	Total Services	Irish Services	Irish as % Total
	€m	€m	%	€m	€m	%
<b>Total - All Sectors</b>	<b>28,147</b>	<b>18,197</b>	<b>64.6%</b>	<b>12,914</b>	<b>7,232</b>	<b>56.0%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>25,931</b>	<b>15,914</b>	<b>61.4%</b>	<b>3,893</b>	<b>3,169</b>	<b>81.4%</b>
Food, Drink & Primary Production	16,378	13,446	82.1%	2,125	1,804	84.9%
Traditional Manufacturing	4,916	2,044	41.6%	1,326	1,064	80.3%
Modern Manufacturing	1,599	425	26.5%	441	301	68.2%
Energy, Water, Waste, Construction	3,038	1,571	51.7%	3,774	2,072	54.9%
<b>Information, Comm. &amp; Other Services</b>	<b>2,216</b>	<b>711</b>	<b>32.1%</b>	<b>5,247</b>	<b>1,991</b>	<b>37.9%</b>
Information, Comm. & Computer	703	197	28.0%	1,114	648	58.2%
Business, Financial & Other Services	1,513	514	34.0%	4,133	1,343	32.5%

Total raw materials purchases amounted to approximately €28.1 billion in 2022, of which €18.1 billion (64.6%) was sourced in Ireland.

- Within the Food, Drink & Primary Production sector, Irish raw materials at €13.4 billion accounted for 82.1% of the total materials spend in that sector. Of all the Irish raw materials purchases by Irish-owned firms, the majority or 74.0% related to the Food and Drink sector in 2022.

- Within the Traditional Manufacturing sectors, 41.6% of materials were sourced in Ireland in 2022, amounting to over €2.0 billion in value.
- For Modern Manufacturing, 26.5% of total materials purchases were Irish materials, amounting to €425 million.
- In the Energy, Water, Waste & Construction sectors 51.7% of all materials were bought in Ireland in 2022, amounting to €1.6 billion.

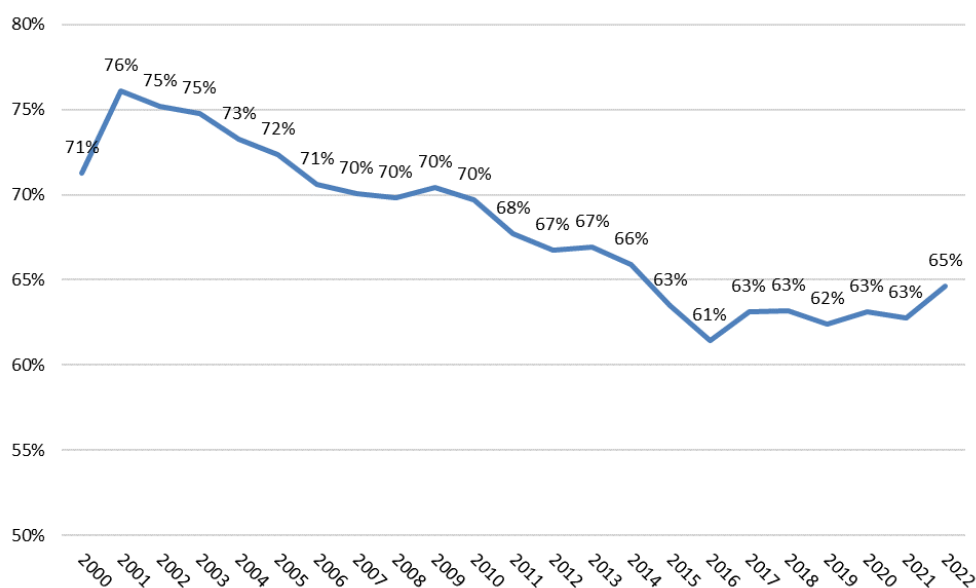
In addition to raw materials, Irish-owned Manufacturing and Information, Communication and Other Services firms spent a further €12.9 billion on services in 2022, with 56.0%, or €7.2 billion sourced in Ireland.

- The proportion of Irish services purchased by Irish-owned firms, ranges from 32.5% for Business, Financial and Other Services firms to 84.4% for Food, Drink & Primary Production firms.
- Overall, the €18.1 billion of materials purchased in Ireland in 2022 continue to significantly outweigh the services purchased in Ireland which stand at €7.2 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, 2000-2022

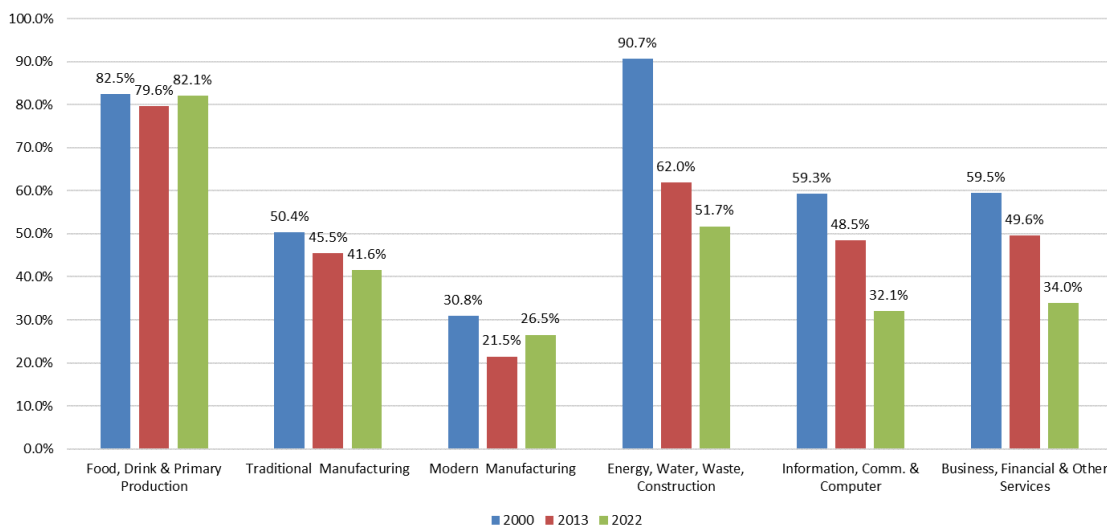


This graph maps out the share of total materials sourced in Ireland by Irish-owned Manufacturing and Services firms. In 2022, 65% of all materials purchased were sourced in Ireland compared with 71% in 2000.

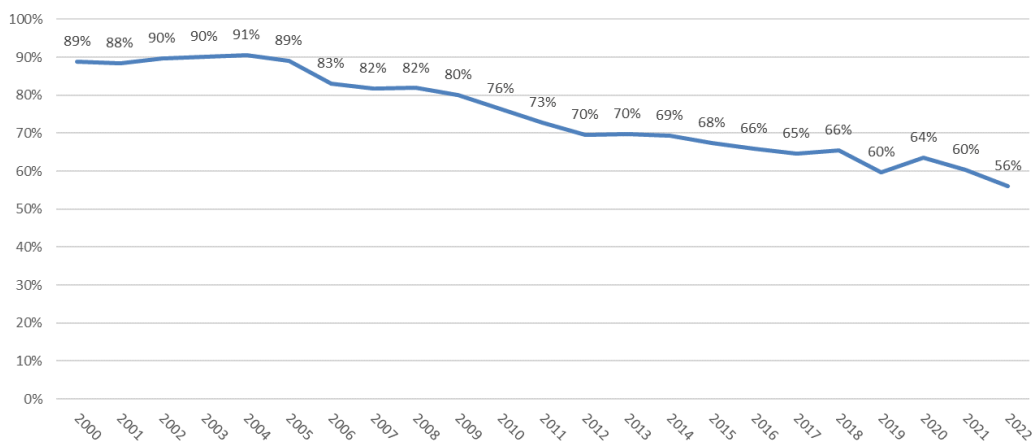
The bar chart below sets out the position by sector for 2000, 2013 and 2022:

- The Food, Drink & Primary Production sector purchased the majority or 82.1% of its materials in Ireland in 2022. This represents a decline from the 2000 and 2013 figures of 82.5% and 79.6%. (Absolute value was €13,446m).
- 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 2022 the percentage of Irish sourced materials was 51.7% (Absolute value was €1,571m).
- The Traditional Manufacturing sector share of Irish-sourced materials stood at 50.4% in 2000 and has decreased since and its purchases of Irish-sourced materials now represent 41.6% of total materials outlay in 2022. (Absolute value was €2,044m).
- The total value of Irish materials purchased by the services sectors amounted to €711m in 2022, 32.1% of their total spend on materials.

**Irish-Sourced Materials as a Share of Total Material Purchased, 2000, 2013 and 2022**



**2.11 Irish-Sourced Services as a Share of All Service Purchased, 2000-2022**



This graph shows the share of total services sourced in Ireland by Irish-owned Manufacturing and Services firms. At 56% the majority of services purchases were sourced in Ireland in 2022 though this represents a decline from 89% from 2000.

The bar chart below shows that purchases of Irish services ranged between 32% in the Business, Finance & Other Services sector to 85% in the Food, Drink & Tobacco sector in 2022. 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 85% in 2022. (Absolute value was €1,804m).

Traditional Manufacturing decreased its share of Irish services purchases to 83% in 2000 to 80% in 2022. (Absolute value was €1064 million).

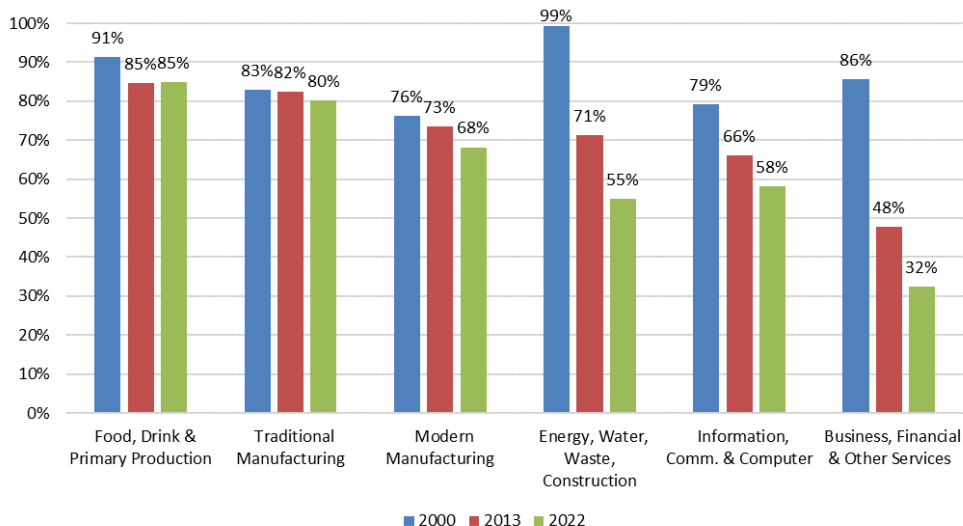
The Modern Manufacturing sector’s share of services sourced in Ireland increased from 76% in 2000 to 68% in 2022. (Absolute value was €301 million).

The Information, Communications and Computer sector’s share of services purchases sourced in Ireland fell from 79% in 2000 to 58% in 2022. (Absolute value was €648 million).

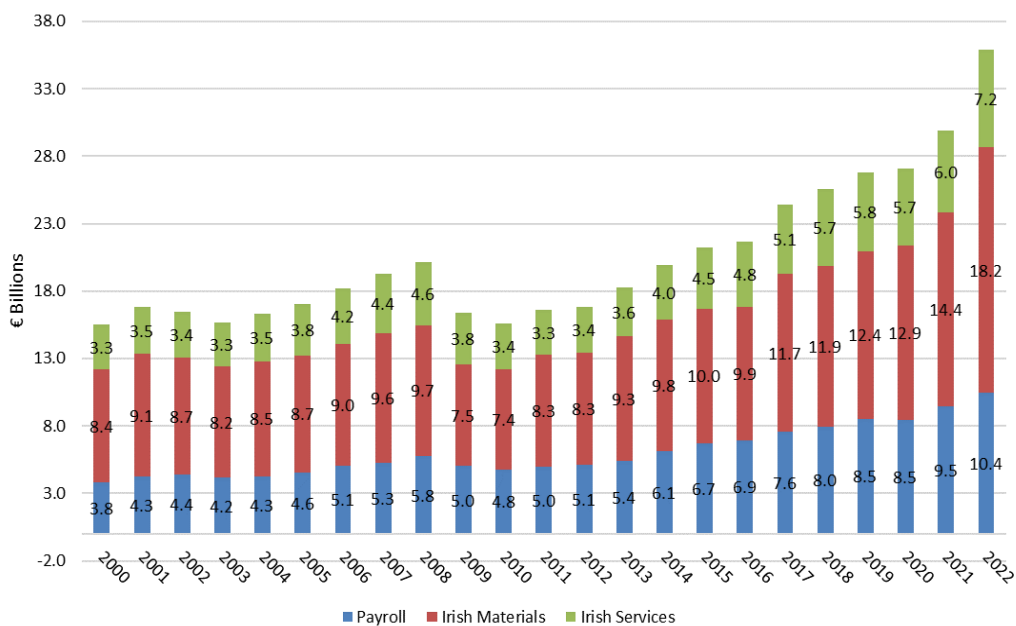
The Business, Financial and Other Services sector sourced 32% of their services requirements in Ireland in 2022, down from 86% in 2000. (Absolute value was €1,343 million).

In 2000, the Energy, Water, Waste & Construction sectors sourced 99% of their services in Ireland. This decreased to 55% in 2022 at a value of €2,072m.

Irish-Sourced Services as a Share of All Service Purchased, 2000 and 2022



2.12 Total Direct Expenditure in the Irish Economy by Irish-Owned Companies, 2000-2022



This chart summarises the total expenditure in the domestic economy by Irish-owned manufacturing and services firms throughout the period 2000-2022.

- In total, Irish-owned firms spent €35.9 billion in the domestic economy in 2022, comprising of:
  - €10.4 billion on payroll;
  - €18.2 billion on Irish raw materials;
  - €7.2 billion on Irish services.

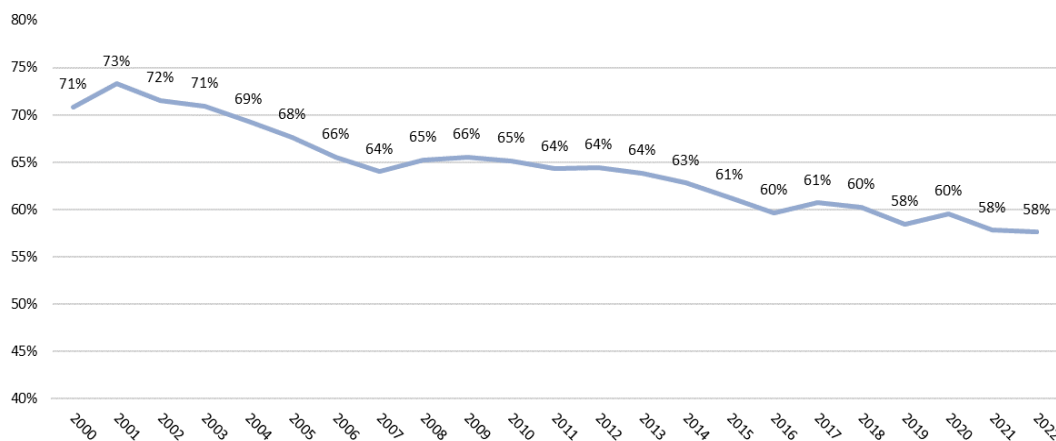
This represents an annual increase in 2022 of 20.0% over 2021 returns.

- Direct expenditure has increased from €15.5 billion in 2000 to €35.9 billion in 2022 and represents an overall nominal increase of 3.9% per annum between 2000 and 2022. Over the period 2000 to 2022:
  - Expenditure on payroll increased at 4.7% per annum.
  - Expenditure on materials sourced in Ireland has increased by 3.6% per annum.
  - Expenditure on services sourced in Ireland has increased by 3.6% 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 2022, these shares have changed, with payroll now making up 29%, Irish materials accounting for 51% and Irish services accounting for 20% 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, 2000-2022**



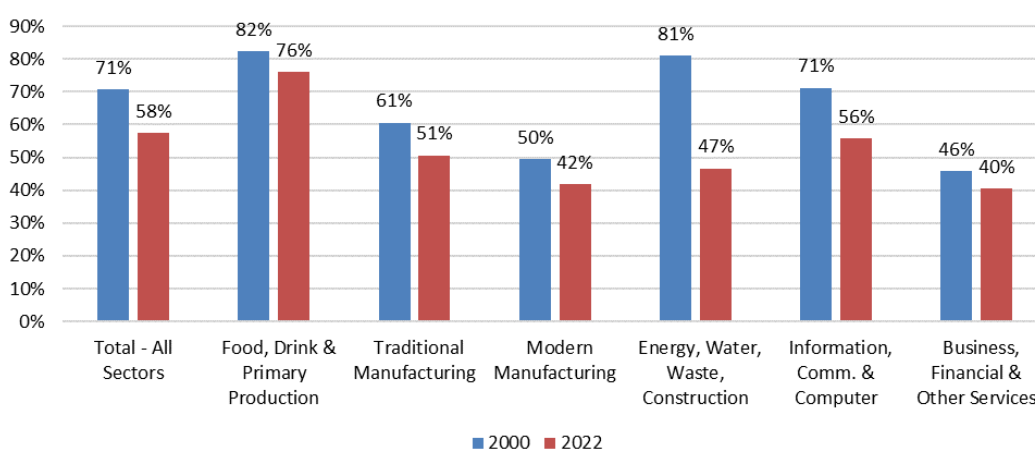
This chart shows the trend in direct expenditure in the economy as a percentage of sales for all Irish-owned firms and for the broad aggregated sectors.

Total direct expenditure as a percentage of sales stood at 71% in 2000. By 2013 this percentage had reduced to 63% and in 2022 stands at 58%.

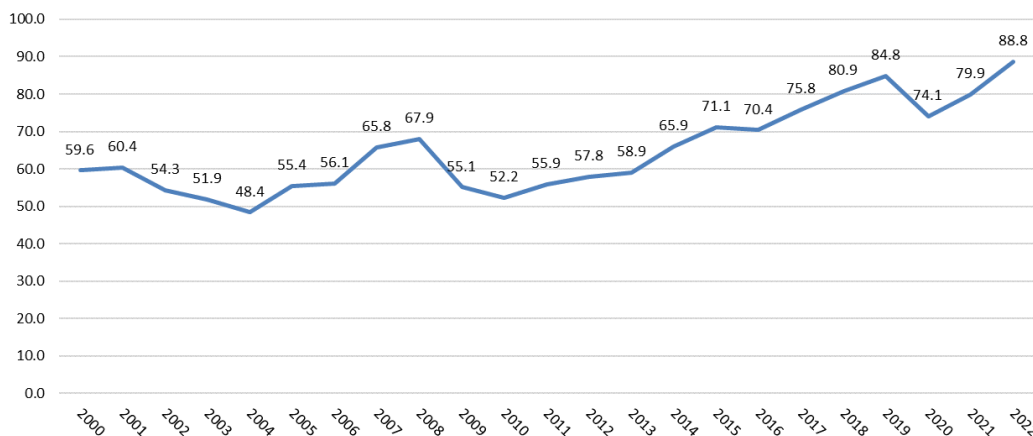
- The Food, Drink & Primary Production sector maintained the highest share of direct expenditure as a percentage of sales at 76% in 2022 down from 82% in 2000.

- The Energy Water, Waste and Construction sector also saw a fall-off on this metric from 81% in 2000 to 47% in 2022.
- In percentage terms direct expenditure in the Information, Communications and Other Services sector stood at 71% of sales in 2000 and decreased to 56% in 2022.
- 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**



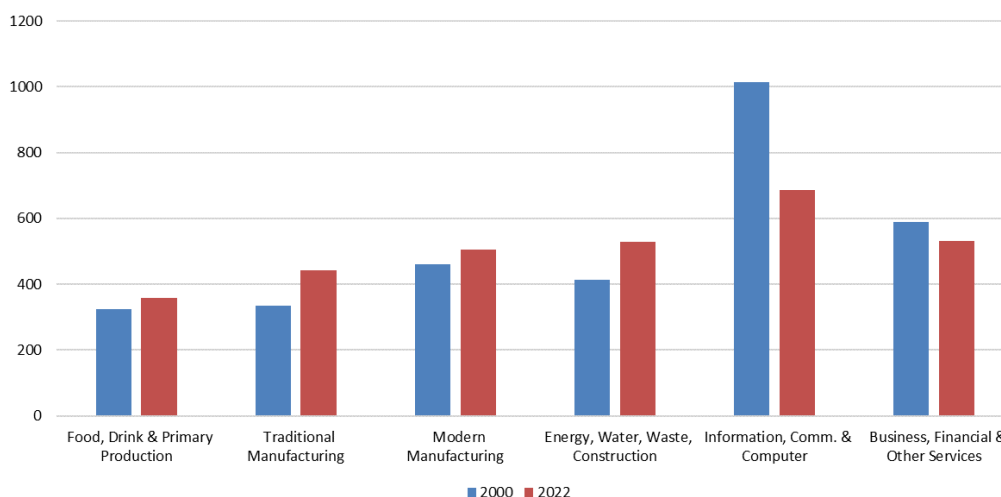
**2.14 Formal Structured Training in Irish-owned Companies, 2000-2022**



Total expenditure on training amounted to €88.8 million in 2022. This represents a rise in formal structured training of 11.1% when compared to the 2021 return of 79.9 million.

The manufacturing and other sectors spent €53.1 million on training in 2022, accounting for 59.9% of total training expenditure. Expenditure on training in the services sectors also increased in 2022 to €35.6 million.

**Formal Structured Training per person employed in Irish-owned Companies by Sector, 2000-2022**



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

- The Traditional Manufacturing sector spent €19.2 million on training in 2022 which represents 21.7% of all training expenditure by all Irish-owned client companies.
- The next highest spending sector was Food, Drink & Primary Production with €16.2 million in 2022.
- Overall expenditure on training per person employed in Irish-owned companies increased from €457.3 in 2021 to €486.2 in 2022. Since 2000 expenditure on training per person has increased from €430.0 to €486.2.
- The biggest change in training per person employed was in the IT Services sector where it decreased from €1,014 in 2000 to €685.7 in 2022, a decline of 32.4%. Energy, Water, Waste and Construction sector increased expenditure on training per person employed by 28.0% between 2000 and 2022 to €528.3.

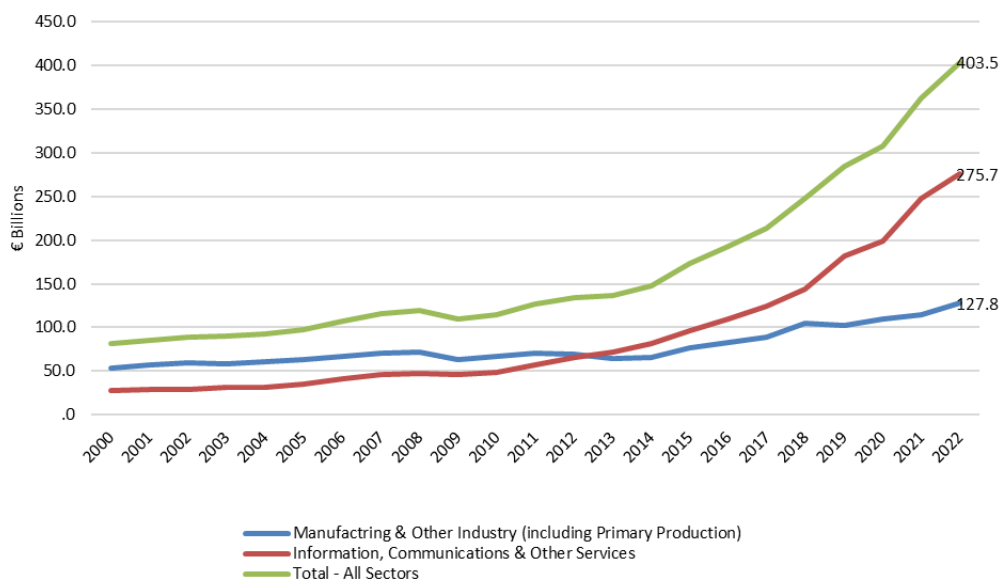
### Definition of Training

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, 2000-2022



Total sales of foreign-owned agency assisted companies increased by 11.3% per annum in nominal terms over 2021, amounting to €403.5 billion in 2022.

- Manufacturing and Other Industry sectors accounted for €127.6 billion of total sales, equating to 31.6% of all sales in foreign-owned companies.
  - Sales in the Manufacturing sectors increased by 11.8% in 2022 over the previous year.
  - The per annum average increase over the twenty-three years from 2000-2022 for Manufacturing sectors is 4.1%. Sales have grown each year since 2014.
- Energy, Water, Waste and Construction sector saw decrease of 45.1% from €341 million to €180 million.
  - Construction was the largest sector in Energy, Water, Waste and Construction with total sales accounting for 95.5% of the sector.
  - Total Sales increased in the Energy sector from €4 million in 2021 to total sales of €7 million in 2022 representing a percentage annual decrease of 69.9%.

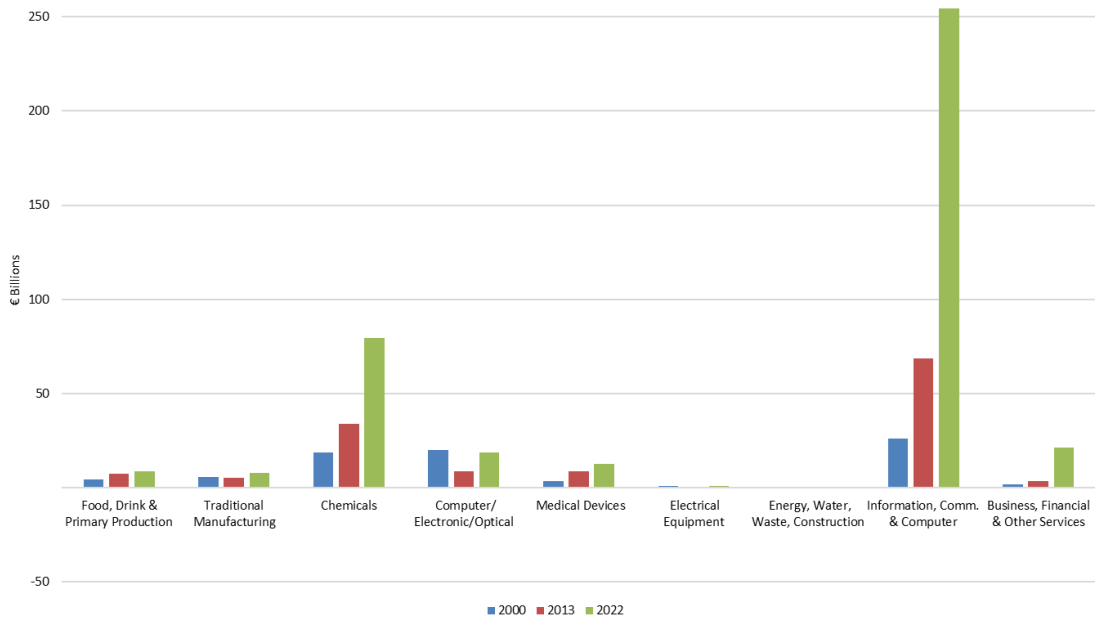
- Sales in the Internationally-traded Services<sup>7</sup> sectors have continued to exceed those of the Manufacturing sectors since 2013.
  - Internationally-traded Services sales have steadily increased from €27.9 billion in 2000 to €275.7 billion in 2022. This is a per annum average increase of 11.0% over that twenty-three-year period.
  - The 2022 sales figure of €275.7 billion represents an increase of 11.2% over the 2021 sales figure of €247.9 billion.

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

	2000	2013	2021	2022	2Per Annum Change 2000- 22	Per Annum Change 2013- 22	Per Annum Change 2013- 22
	€m	€m	€m	€m	%	%	%
<b>Total - All Sectors</b>	<b>81,117</b>	<b>136,252</b>	<b>362,443</b>	<b>403,465</b>	<b>7.6%</b>	<b>12.8%</b>	<b>11.3%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>53,186</b>	<b>64,031</b>	<b>114,459</b>	<b>127,790</b>	<b>4.1%</b>	<b>8.0%</b>	<b>11.6%</b>
Food & Drink	4,402	7,303	7,188	8,600	3.1%	1.8%	19.6%
Traditional Manufacturing	5,821	5,148	6,933	7,783	1.3%	4.7%	12.3%
Chemicals	18,668	33,950	72,305	79,417	6.8%	9.9%	9.8%
Computer/ Electronic/Optical	19,929	8,644	15,731	18,732	-0.3%	9.0%	19.1%
Medical Devices	3,358	8,643	11,437	12,436	6.1%	4.1%	8.7%
<b>Infor., Comm. &amp; Other Services</b>	<b>27,931</b>	<b>72,221</b>	<b>247,984</b>	<b>275,675</b>	<b>11.0%</b>	<b>16.0%</b>	<b>11.2%</b>
Infor., Comm. & Computer	26,132	68,699	230,572	254,255	10.9%	15.7%	10.3%
Bus., Financial & Other	1,798	3,522	17,412	21,420	11.9%	22.2%	23.0%

<sup>7</sup> 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

Sales by sector - Foreign-owned Companies, 2000, 2013, 2022



Between 2000 and 2022, the Information, Communications and Computer Services sector, recorded a per annum growth of 10.9% and at €254.3 billion represented 68.4% of total sales by foreign-owned client firms in 2022.

- The Chemicals sector accounted for 19.7% of total sales in 2022. Sales in the sector totalled €79.4 billion in 2022, a per annum increase of 6.8% over the 2000 sales figure of €18.7 billion.
- The Computer, Electronic and Optical Products sector reported sales of €18.7 billion in 2022, an increase of 19.1% over the 2021 figure of €15.7 billion. This is a sector that has seen a per annum decrease of -0.3% since 2000.

### 3.3 Changing Composition of Sales and Employment in Foreign-owned Client Companies 2000 and 2022

	Sales		Employment	
	2000	2022	2000	2022
<b>Manufacturing &amp; Other Industry</b>	<b>65.6%</b>	<b>31.7%</b>	<b>71.9%</b>	<b>44.0%</b>
Food, Drink & Primary Production	5.4%	2.1%	6.9%	2.9%
Traditional Manufacturing	7.2%	1.9%	20.5%	7.2%
Chemicals	23.0%	19.7%	13.1%	12.0%
Computer, Electronic & Optical Products	24.6%	4.6%	18.8%	7.4%
Medical Devices	4.1%	15.3%	8.9%	13.9%
Electrical Equipment	1.2%	1.0%	3.3%	0.6%
Energy, Waste, Water, Construction	0.1%	0.2%	0.5%	0.2%
<b>Information, Comm. &amp; Other Services</b>	<b>34.4%</b>	<b>68.3%</b>	<b>28.1%</b>	<b>56.0%</b>
Information, Comm. & Computer	32.2%	63.0%	23.5%	40.2%
Business, Financial & Other Services	2.2%	5.3%	4.6%	15.7%

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 2022.

In terms of sales, the relative importance of manufacturing activity has decreased, accounting for 31.7% of all sales in 2022, down from 65.6% in 2000. The Information, Communication & Other Services now accounts for 68.3% of sales, up from 34.4% in 2000.

In 2022, the following two sectors made up 82.7% of total sales of foreign-owned companies:

- Information, Communication and Computer Services sector (63.0%)
- Chemicals sector (19.7%)

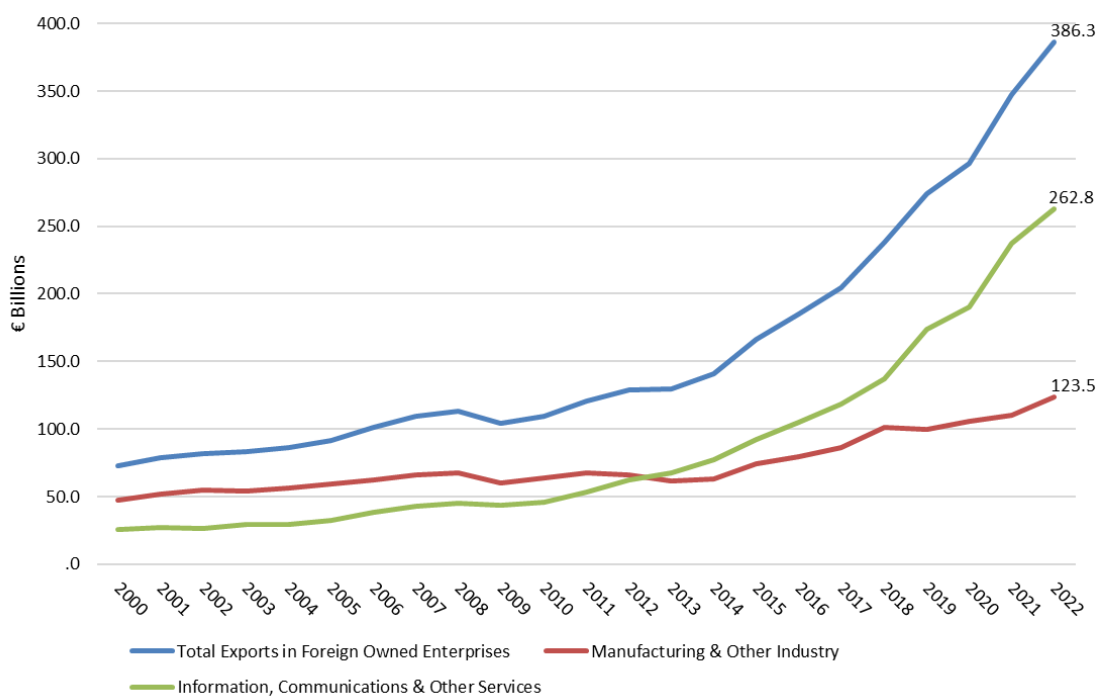
In terms of employment, a different pattern emerges, with Manufacturing accounting for less than half of employment (44.0%) in 2022.

- The Medical Devices sector has 13.9% of employment, up from 8.9% in 2000.
- The Chemicals sector is the next most significant in terms of employment with 12.0%, 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 40.2% in 2022, up from 23.5% in 2000.

### 3.4 Exports in Foreign-owned Client Companies, 2000-2022



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

The 2022 export sales figure of foreign-owned companies in Ireland at €386.5 billion equates to 95.7% 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 10.8% in 2022 over the 2021 figure of €237.1 billion and with the exception of 2009 have recorded increases in every year since 2000.
  - The Information, Communications and Other Services sector accounted for 68.0% of all export sales in 2022 at €262.8 billion.
  - This important sector has seen an annual average increase of 11.2% in the twenty-three-year period between 2000 and 2022.
- The Manufacturing sectors accounted for 31.9% of all exports in foreign-owned companies in Ireland in 2022 and amounted to €123.4 billion.
  - Manufacturing exports increased by 11.9% in 2022 over the 2021 export sales figure of €110.4 billion.
  - The average annualised increase in Manufacturing exports since 2000 is 4.4% from a base of €47.4 billion in current prices rising to 123.5 billion in 2022.

### 3.5 Exports by Sector in Foreign-owned Companies, 2000, 2013, 2020 and 2022

	2000	2013	2021	2022	Per Annum Change 2000-22	Per Annum Change 2013-22	Per Annum Change 2021-22
	€m	€m	€m	€m	%	%	%
<b>Total All Sectors</b>	<b>72,891</b>	<b>129,361</b>	<b>347,480</b>	<b>386,273</b>	<b>7.9%</b>	<b>12.9%</b>	<b>11.2%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>47,382</b>	<b>61,421</b>	<b>110,373</b>	<b>123,465</b>	<b>4.4%</b>	<b>8.1%</b>	<b>11.9%</b>
Food, Drink & Primary Production	2,634	6,119	6,330	7,545	4.9%	2.4%	19.2%
Traditional Manufacturing	5,364	4,636	6,119	6,853	1.1%	4.4%	12.0%
Chemicals	17,862	33,374	71,819	78,989	7.0%	10.0%	10.0%
Computer, Electronic & Optical	18,441	8,589	14,848	17,876	-0.1%	8.5%	20.4%
Medical Devices	3,057	8,651	11,131	12,092	6.4%	3.8%	8.6%
Electrical Equipment	756	246	755	974	1.2%	16.5%	28.9%

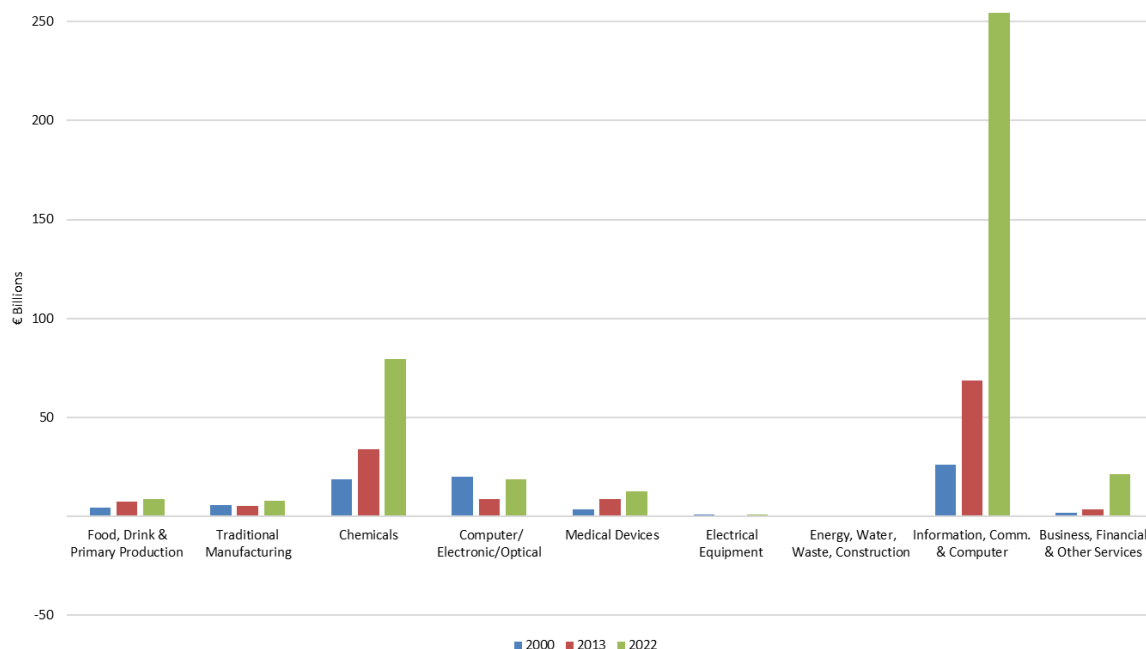
Energy, waste, water, construction	262	331	760	761	5.0%	9.7%	0.1%
<b>Infor., Comm. &amp; Other Services</b>	<b>25,509</b>	<b>67,940</b>	<b>237,107</b>	<b>262,808</b>	<b>11.2%</b>	<b>16.2%</b>	<b>10.8%</b>
Infor., Comm. & Computer	24,365	65,385	222,867	245,073	11.1%	15.8%	10.0%
Bus., Financial & Other Services	1,144	2,555	14,240	17,735	13.3%	24.0%	24.5%

The Information, Communications & Computer services sector had the largest level of exports in 2022 at €245.1 billion. This is an increase of 11.1% over 2021 and an 10.0% annual increase in nominal terms since 2000 when exports stood at €24.4 billion.

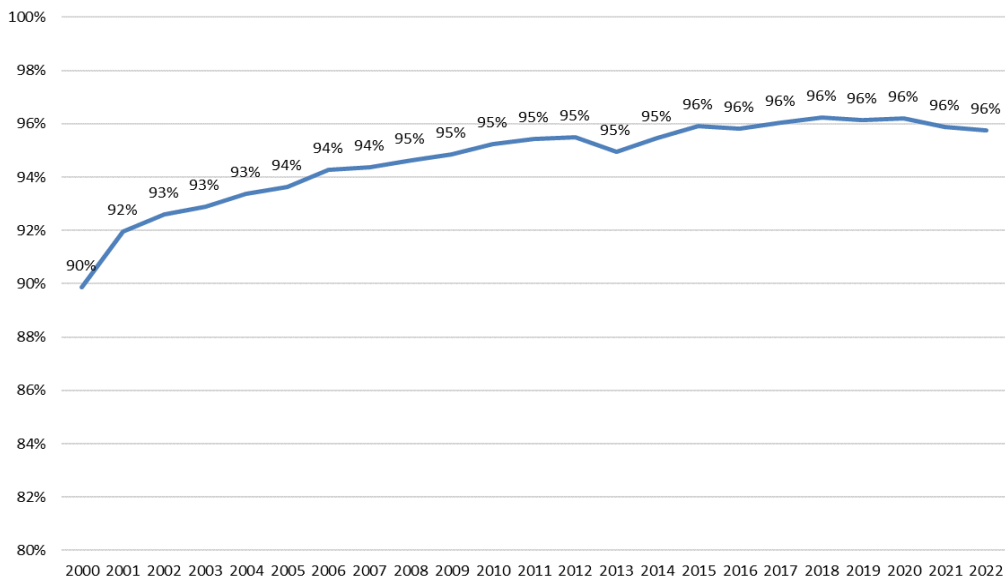
Exports in the Chemicals sector was also significant in 2022 at €78.9 billion, an increase of 7.0% in 2022 over 2021 and an average annual increase of 10.0% since 2000.

The Computer, Electronic & Optical sector saw an increase of 20.4% in 2022 over 2021 with exports of €17.8 billion. This sector’s exports experienced an average annual decrease of 0.1% between 2000 and 2022.

**Exports by Sector in Foreign-owned Companies, 2000, 2013, and 2022**

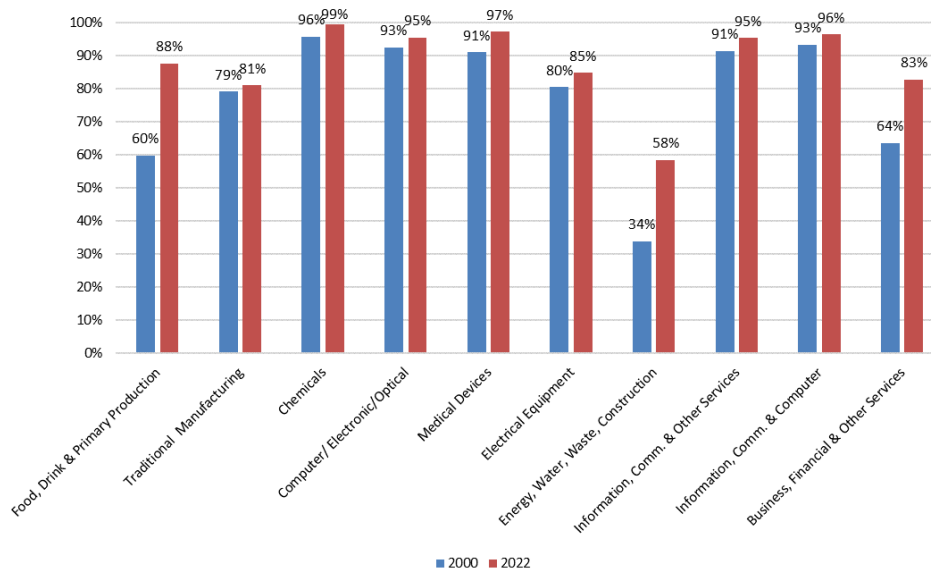


**3.6 Exports as a percentage of Total Sales in Foreign-owned Companies, 2000-2022**



- The total export intensity of foreign-owned industry has increased from 90% in 2000 to 95% in 2013. Following an increase to 96% in 2015 it has remained stable ever since then.
- All sectors have increased their export intensity since 2000.

**Exports as a percentage of Total Sales in Foreign-owned Companies, 2000, 2022**



- The foreign-owned high-tech manufacturing sectors of Chemicals produce goods almost exclusively for export with approximately 99% of all sales being exported.



- Computer, Electronic and Optical and Medical Devices exported 95% of their manufactured goods for export.
- The Information, Communication and Computer Services sector also exported 96% of their services in 2022, up from 93% in 2000.
- The Food, Drink & Primary Production sector, with an 88% share of sales for export in 2022, increased its proportion of exports from 60% in 2000.
- Similarly, the Traditional Manufacturing sector has increased its proportion of sales for export, from 79% in 2000 to 81% in 2022.

3.7 Value Added in Foreign-owned Companies, 2000-2022

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2022	Per Annum Change 2000-22	2000	2022	2000	2022	Per Annum Change 2000-22
	€m	€m	%	%	%	€k	€k	%
<b>Total - All Sectors</b>	<b>34,340</b>	<b>169,338</b>	<b>7.5%</b>	<b>42.3%</b>	<b>42.0%</b>	<b>199.3</b>	<b>646.9</b>	<b>5.5%</b>
<b>Manu./ Other Industry</b>	<b>24,402</b>	<b>68,990</b>	<b>4.8%</b>	<b>45.9%</b>	<b>54.0%</b>	<b>197.1</b>	<b>598.6</b>	<b>5.2%</b>
Food & Drink	1,991	3,811	3.0%	45.2%	44.3%	167.9	508.1	5.2%
Traditional Manu.	2,470	3,630	1.8%	36.7%	41.9%	60.6	168.9	4.8%
Chemicals	10,518	43,134	6.6%	56.3%	54.3%	466.4	1377.4	5.0%
Computer, Electronic & Optical	7,522	12,495	2.3%	37.7%	66.7%	232.7	641.0	4.7%
Medical Devices	1,877	5,928	5.4%	55.9%	47.7%	121.9	162.7	1.3%
Electrical Equipment	334	449	1.4%	35.5%	54.6%	59.1	268.3	7.1%
Energy, Water, Waste, Construction	24	-9	-1.6%	35.8%	-4.6%	59.1	268.3	7.1%
<b>Inform./ Comm. &amp; Other Services</b>	<b>9,938</b>	<b>100,348</b>	<b>11.1%</b>	<b>35.6%</b>	<b>36.4%</b>	<b>205.1</b>	<b>685.0</b>	<b>5.6%</b>
Information/ Comm. & Computer	8,534	86,348	11.1%	32.7%	34.0%	210.4	819.8	6.4%

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2022	% Change	2000	2022	2000	2022	% Change
Business, Fin. & Other Services	1,404	14,000	11.0%	78.1%	65.4%	178.0	340.0	3.0%

The total value added of foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €169.3 billion in 2022.

Although total value added grew at a rate of 7.5% per annum in nominal terms over the period 2000-2022, there are differences at sectoral level. There was growth of 11.1% per annum in value added in the Information, Communication and Other Internationally Traded Services sectors over this period and growth of 4.8% per annum in the manufacturing sectors.

Overall, value added per person employed in Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €646.9 in 2022, an increase of 5.5% 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 2022

	Total Payroll			Payroll per Employee		
	2000	2022	Per annum change 2000-22	2000	2022	Per annum change 2000-22
	€m	€m	€m	€k	€k	%
<b>Total - All Sectors</b>	<b>6,301</b>	<b>22,640</b>	<b>6.0%</b>	<b>36.6</b>	<b>86.5</b>	<b>4.0%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>4,365</b>	<b>9,217</b>	<b>3.5%</b>	<b>35.3</b>	<b>80.0</b>	<b>3.8%</b>
Food, Drink & Primary Production	481	617	1.1%	40.6	82.3	3.3%
Traditional Manufacturing	1,240	1,215	-0.1%	35.2	64.5	2.8%
Chemicals	947	3,191	5.7%	42.0	101.9	4.1%
Computer Electronic Optical	1,223	1,652	1.4%	37.8	84.8	3.7%

	Total Payroll			Payroll per Employee		
	Number of Firms	Payroll (€ million)	% Change	€1000	€	% Change
Medical Devices	438	2,469	8.2%	28.5	67.8	4.0%
Electrical Equipment	145	98	-1.8%	25.6	58.2	3.8%
Energy, Water, Waste, Construction	36	72	3.1%	44.9	116.3	4.4%
<b>Info./ Comm./Other Services</b>	<b>1,936</b>	<b>13,423</b>	<b>9.2%</b>	<b>40.0</b>	<b>91.6</b>	<b>3.8%</b>
Information, Comm. & Computer	1,662	9,788	8.4%	41.0	92.9	3.8%
Business, Financial & Other	273	3,635	12.5%	34.7	88.3	4.3%

The total payroll bill of foreign-owned firms amounted to €22.6 billion in 2022 with manufacturing accounting for €9.2 billion (40.7%) and services contributing the balance of €13.4 billion (59.3%).

Total payroll per person employed averaged €86,493 in 2022, representing an increase of 4.0% per annum in nominal terms over the period 2000-2022.

Payroll per employee in the Information, Communication and Other Internationally Traded Services sector and the Manufacturing sectors averaged €91,628 and €79,968 respectively in 2022.

The Energy, Waste, Water and Construction sector had the highest average payroll per capita of all sectors in 2022 at €116,343, followed by Chemicals with €101,914 and the Information, Communication and Computer sector at €92,933.

#### 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 &amp; Services Purchased by Foreign-Owned Companies, 2022

	Materials Purchased 2022			Services Purchased 2022		
	Total Materials	Irish Materials	Irish as % of Total	Total Services	Irish Services	Irish as % of Total
	€m	€m	%	€m	€m	%
<b>Total - All Sectors</b>	<b>34,783</b>	<b>4,485</b>	<b>12.9%</b>	<b>199,343</b>	<b>10,930</b>	<b>5.5%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>23,986</b>	<b>4,108</b>	<b>17.1%</b>	<b>34,814</b>	<b>3,839</b>	<b>11.0%</b>
Food & Drink	2,674	1,156	43.2%	2,114	543	25.7%
Traditional Manufacturing	3,936	665	16.9%	851	490	57.6%
Chemicals	10,153	749	7.4%	26,130	1,742	6.7%
Computer/Electronic/Optical Prod.	3,271	583	17.8%	2,965	300	10.1%
Medical Devices	3,889	955	24.6%	2,619	745	28.4%
Electrical Equipment	353	43	12.2%	21	14	68.2%
Energy, Water, Waste, Construction	62	1	1.1%	135	19	14.0%
<b>Infor./Comm. &amp; Other Services</b>	<b>10,798</b>	<b>376</b>	<b>3.5%</b>	<b>164,529</b>	<b>7,091</b>	<b>4.3%</b>
Information, Comm. & Computer	9,838	276	2.8%	158,069	5,500	3.5%
Business/Financial & Other Services	960	101	10.5%	6,460	1,591	24.6%

In overall terms, foreign-owned sector spent €34.7 billion on materials, of which €4.4 billion or 12.9% 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 & Primary Production sector where 43.2% of all materials purchased were sourced in Ireland. In monetary terms, this amounted to €1.15 billion spent in Ireland in 2022.
- The Medical Devices sector sourced 24.6% of their materials in Ireland.

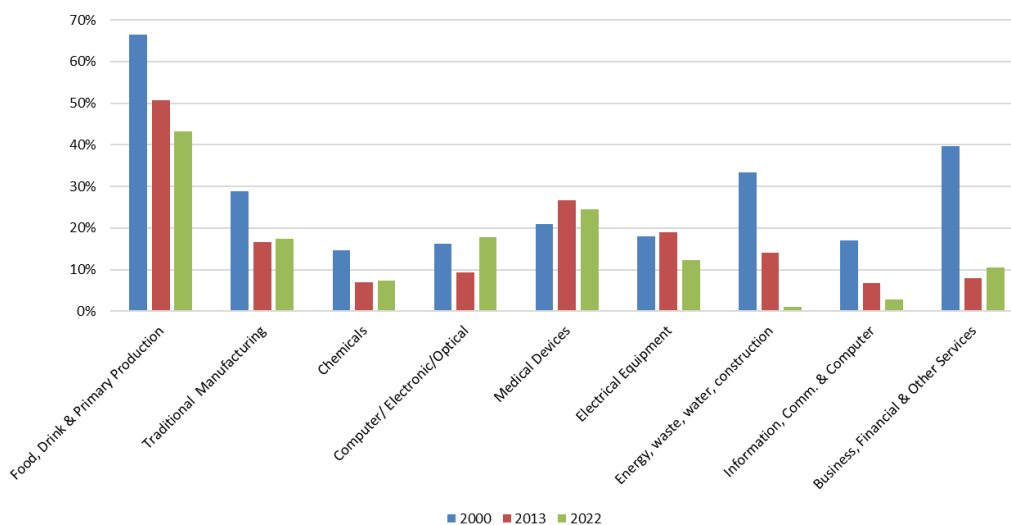
Foreign-owned sector spend on services sourced in Ireland amounted to €10.9 billion in 2022 or 5.5% of total services. The total spent on services amounted to €199.3 billion. It should be noted that this figure includes royalty payments.

- The services sector with the highest spend on Irish services was the Information, Communication and Computer sector which spent €5.5 billion or 3.5% of a total spend of €164.5 billion on services in 2022.
- Traditional Manufacturing had the highest proportion on Irish-sourced services at 57.6% of its total spend.

### Definition - Services

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

### 3.10 Irish-Sourced Materials as a Share of All Materials Purchased by Foreign-Owned Client Companies, 2000-2022



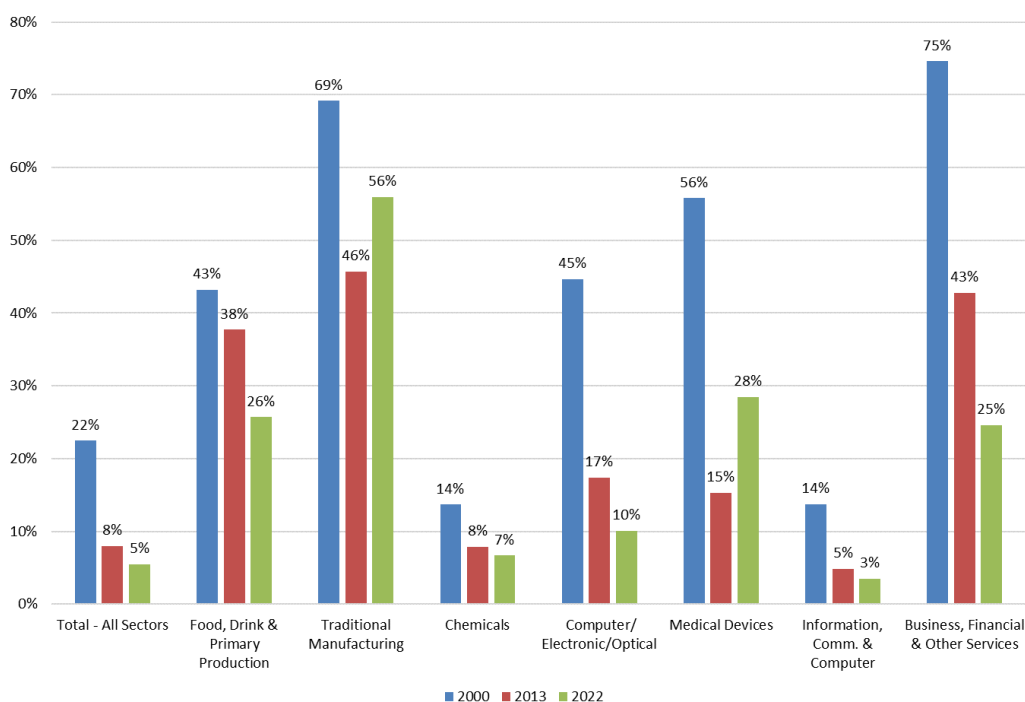
This graph depicts trends in the share of materials purchased by foreign-owned companies that were sourced in Ireland. The trend in the share of materials purchased in Ireland was in decline for all sectors between 2000 and 2013 falling from 20% to 14%. It has since fallen further and now stands at 13% in 2022.

The sector with the largest share of materials purchased in Ireland is the Food & Drink sector with 43%, though this share has dropped from 67% in 2000. (Absolute value €1,156m).

The Traditional Manufacturing sector’s share of Irish materials has decreased steadily over the period of this time-series from 29% in 2000 to 17% in 2022. (Absolute value €622m).

Two sectors that have increased their share of Irish materials between 2000 and 2022 are the Medical Devices sector going from 21% to 25%. (Absolute value was €955m) and Computer, Electronic and Optical Products increasing from 16% to 18%. (Absolute 583m).

### 3.11 Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000-2022

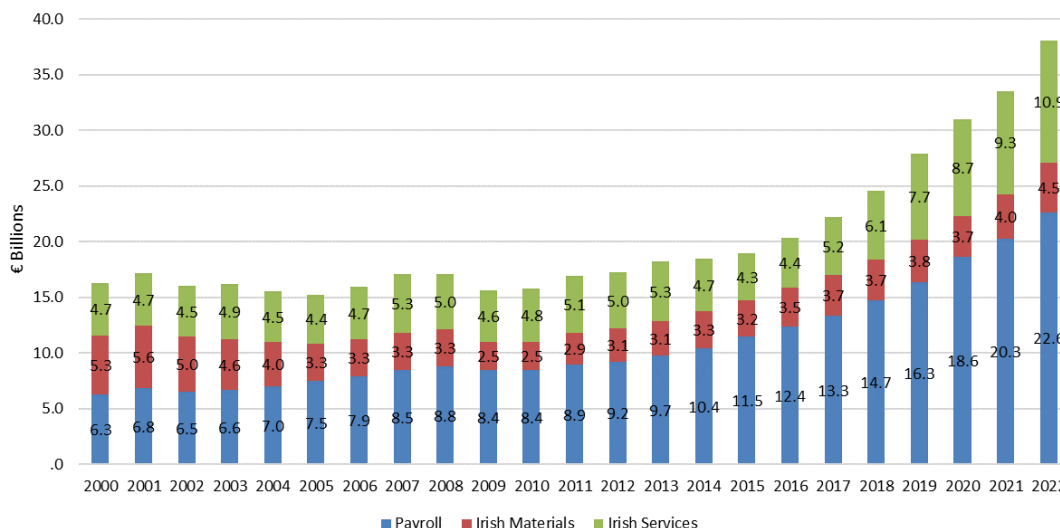


This graph shows the share of total services sourced in Ireland by foreign-owned Manufacturing and Services firms. In 2000, 22% of all services purchased by foreign-owned firms were sourced in Ireland - this figure has declined to 5% in 2022.

- Traditional Manufacturing dropped its share of Irish service purchases from 69% in 2000 to 56% in 2022 but remains the highest performing sector as regards Irish-sourced services. (Absolute value was €476.0 million).
- The Medical Devices sector’s share of services sourced in Ireland dropped from 56% in 2000 to 28% in 2022. (Absolute value was €745.1 million).
- The Computer, Electronic and Optical Products sector has also decreased its share of Irish services purchases from 45% in 2000 to 10% in 2022. (Absolute value €299.8 million).
- The Information, Communications and Computer Services sector’s share of service purchases sourced in Ireland fell from 14% in 2000 to 3% in 2022. (Absolute value 5,500.5 million).
- The Food & Drink sector declined from the 2000 figure of 43% to 26% in 2022 (Absolute value €543.0 million).

- The percentage of Irish services purchased by the Chemical sector dropped from 14% in 2000 to 7% in 2022. (Absolute value €1,742.0 million).

**3.12 Total Direct Expenditure in the Irish Economy by Foreign-Owned Companies, 2000-2022**



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 €38.1 billion in 2022, comprising €22.6 billion on payroll, €4.5 billion on materials produced in Ireland and €10.9 billion on services purchased in Ireland.

- Direct expenditure by foreign-owned firms was up 13.5% in 2022 from €33.5 billion in 2021.
- Direct expenditure has increased from €16.3 billion in 2000 and shows an overall nominal per annum increase of 3.9% per annum between 2000 and 2022.
- Over the period 2000 to 2022:
  - Payroll has increased by 6.0% per annum;
  - Expenditure on materials sourced in Ireland has decreased by 0.7% per annum;
  - Expenditure on services sourced in Ireland has increased by 3.9% per annum.

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

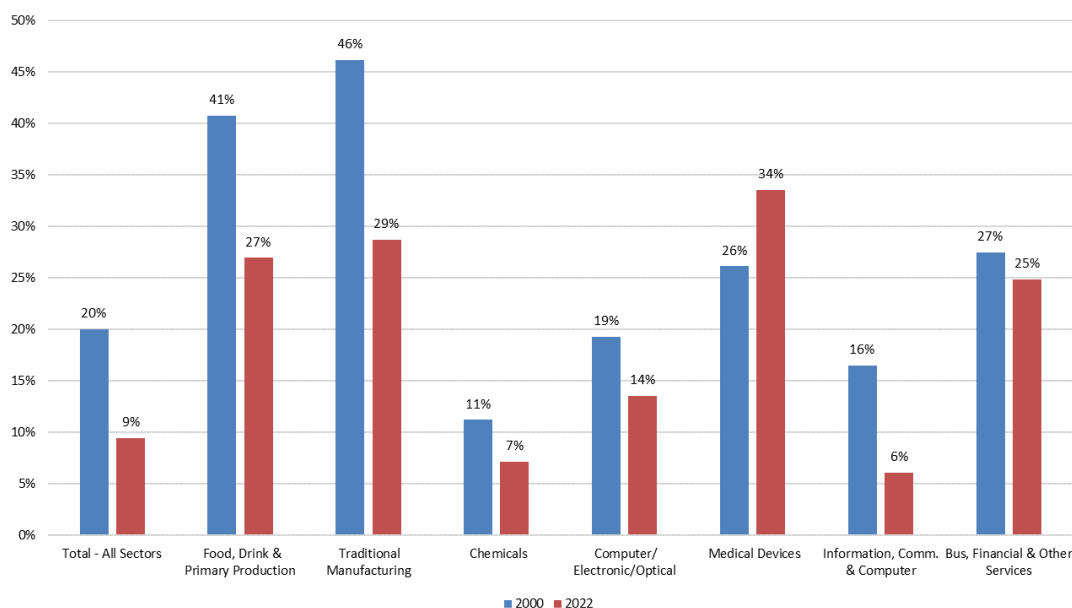
- In 2000 payroll made up 39%, Irish materials 32% and Irish services 29% of total Irish economy expenditure;
- In 2022, payroll accounts for 60% of total expenditure in the Irish economy, with Irish materials and Irish services accounting for 12% and 28% respectively.



**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, 2000-2022**



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 2000-2022.

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 9% in 2022.

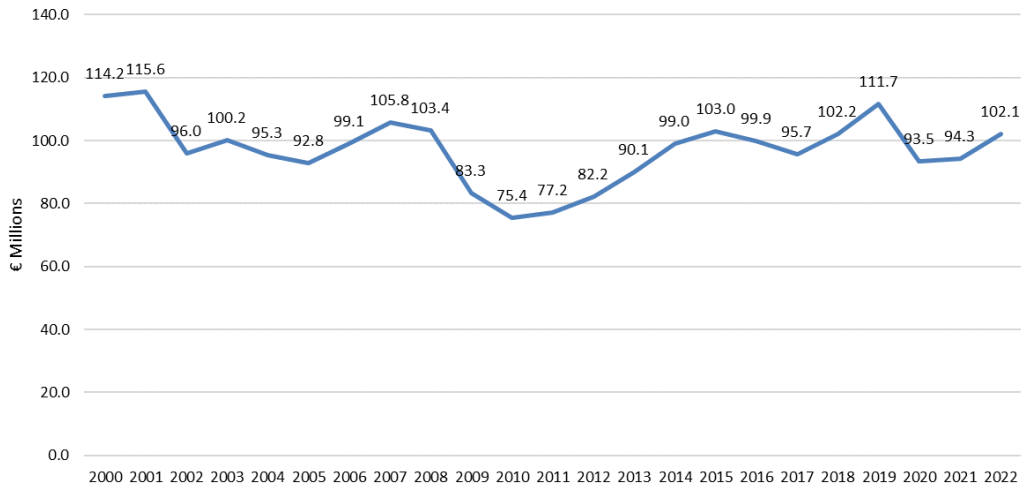
Medical Devices is the only sector to have gone against this aggregate trend. For Medical Devices DEIE/Sales has increased from 26% in 2000 to 34% in 2022 (Value €4.1 billion).

The Information, Communication and Computer Services Sector decreased its Direct Expenditure as a percentage of sales from 16% in 2000 to 6% in 2022. In absolute terms this is the sector with the greatest direct expenditure in the Irish economy with a spend of €15.5 billion in 2022 accounting for 41% of total direct expenditure by foreign firms in the economy in 2022.

The next highest contributor in absolute terms is the Chemicals sector with a total expenditure of €5.6 billion in 2022. This represents 14.9% of total direct expenditure by foreign firms in the economy in 2022.

Direct Expenditure in Traditional Manufacturing has fallen from 46% in 2000 to 29% in 2022. In absolute terms total expenditure stood at €2.2 billion in 2022.

**3.14 Formal Structured Training in Foreign-owned Companies, 2000-2022**

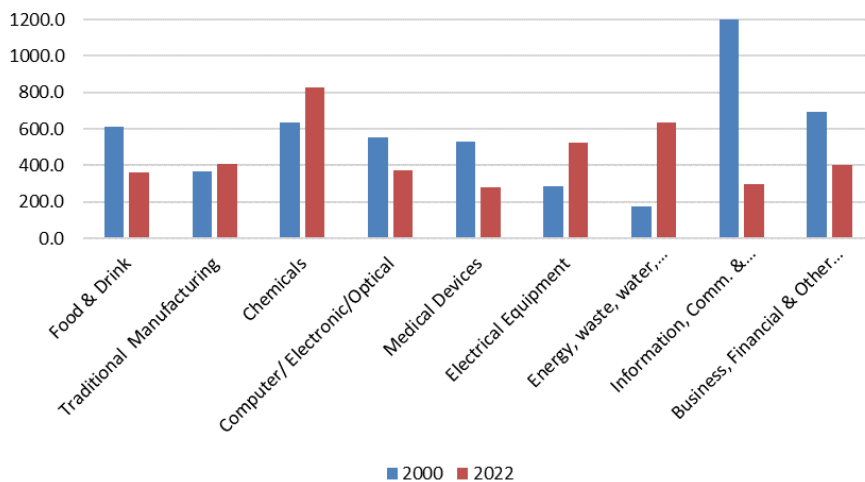


Total expenditure on structured, formal training in foreign-owned companies in 2022 amounted to €102.1 million, an increase of 8.2% over 2021.

Expenditure on training has increased from a low of €75.4 million in 2010, peaking at €111.7 million in 2019 and decreasing to €102.1 million in 2022.

Spending on training has not recovered to the rates reported in the early years of this survey when total funding for training reached €115.6 million in 2001.

**Formal Structured Training per person employed in Foreign-owned Companies by Sector, 2000-2022**



- The Manufacturing sectors spent €54.3 million or 53.2% of total expenditure on structured training in foreign-owned companies.
  - Within Manufacturing, the chemicals sector is responsible for 25.4% of this expenditure in 2022 at €26.0 million.
- The Services sectors spend on training in 2022 was €47.8 million.
  - The IT services sector spends most on training within Services with €31.1m in 2022 or 30.5% of total services spend in that year.
- Overall expenditure on training per person employed in foreign-owned companies decreased by from €662.7 in 2000 to €389.9 in 2022.
- The sector with the biggest decline in expenditure on training per person employed was IT Services which declined from €1,119.0 in 2000 to €326.3 in 2022, a drop of 70.8%. Business, Financial and Other Services declined from €694.5 in 2000 to €404.6 in 2022, a decline of 41.7%. Food & Drink declined from €614.7 in 2000 to €362.4 in 2022, a decline of 41.7%.

## 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.2<sup>8</sup>. (Nomenclature statistique des Activités économiques dans la Communauté Européenne)

To highlight broad trends in the report, sectors have been amalgamated into smaller groups<sup>9</sup>.

### **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), , machinery & equipment (28), transport equipment (29-30) and other miscellaneous manufacturing (31-33 exc. 32.5).

##### **Modern Manufacturing:**

- chemicals (19-21), computer, electronic & optical products (26), electrical equipment (27) medical devices (32.5)

#### **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.

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<sup>8</sup> NACE Rev 2 – For more detail on NACE codes go to the Central Statistics Office web-site: [www.cso.ie](http://www.cso.ie)

<sup>9</sup> 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 2010<sup>10</sup>.

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.

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<sup>10</sup> <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](mailto:abr@insightsc.ie)

### Annual Business Report 2022/2023

Conducted by Insight Statistical Consulting on behalf of the Department of Enterprise, Trade and Employment (DETE)/Enterprise Ireland.

Please return a completed form via e-mail to [abr@insightsc.ie](mailto: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 DETE's Business Information System (BIS).

### SALES AND EXPORTS

**Q1** - Please record in thousands of Euros (€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 2021 (€000's)	Estimate 2022 (€000's)	Forecast 2023 (€000's)	Forecast 2024 (€000's)
<b>Q1a - DOMESTIC SALES</b>				
<b>Q1a1 - MANUFACTURED GOODS</b>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	..€ <input type="text"/>
<b>Q1a2 - SERVICES</b>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>	..€ <input type="text"/>

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

#### Q1b - EXPORT SALES

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

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

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

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

	Actual 2021 %	Estimate 2022 %	Forecast 2023 %
<b>Q1d - DOMESTIC SALES TO PUBLIC SECTOR</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

	Actual 2021 %	Estimate 2022 %	Forecast 2023 %
<b>Q1e - DOMESTIC SALES TO FOREIGN OWNED COMPANIES BASED IN IRELAND</b>	<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

<b>Q1f2 - GLOBAL SALES</b>	€ <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).

<b>Q1g - DISTRIBUTION SALES</b>	€ <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).

<b>Q1h - NEW PRODUCT SALES PERCENTAGE (%) IN 2022</b>	<input type="text"/> %
---	------------------------

What proportion of the value of sales in 2022 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](mailto: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 2021, 2022 and your forecasted exports in 2023. Please note that the total of these figures **should be the same as those summarised in Q1b**.

	Actual 2021 (€000's)	Estimate 2022 (€000's)	Forecast 2023 (€000's)		Actual 2021 (€000's)	Estimate 2022 (€000's)	Forecast 2023 (€000's)
England & Wales				Bahrain			
Northern Ireland				Egypt			
Scotland				Ghana			
<b>UK</b>				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				<b>M. EAST &amp; AFRICA</b>			
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			
<b>EUROPE</b>				Vietnam			
				<b>ASIA</b>			
Argentina							
Brazil							
Canada							
Chile							
Colombia							
Mexico							
Peru							
Uruguay							
USA							
Venezuela							
<b>AMERICAS</b>							

Please ensure that all monetary amounts are in thousands.





For assistance, please dial 01-661 2467 or email [abr@insights.ie](mailto:abr@insights.ie)



**EMPLOYMENT**

**Q3a – COMPANY STAFF**

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

	Actual 2021	Actual 2022	Forecast 2023
<b>Q3a1 - Full-Time:</b> <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"/>
<b>Q3a2 - Other:</b> <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"/>
<b>TOTAL COMPANY STAFF</b>	<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 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 2021	Actual 2022	Forecast 2023
<b>Q3b1 - Full-Time:</b> <i>Employed on a full-time basis for at least nine months</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Q3b2 - Other:</b> <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"/>
<b>TOTAL AGENCY STAFF</b>	<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 2021	Actual 2022	Forecast 2023
<b>Full-Time Employees Only:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Q3d – OPEN POSITIONS:** How many open positions do you currently have in the Republic of Ireland?

<b>Q3d1 - Full-Time:</b> <i>Employed on a full-time basis for at least nine months</i>	<input type="text"/>
<b>Q3d2 - Other:</b> <i>All other classification of agency worker, can be part-time, short-term, temporary or other.</i>	<input type="text"/>
<b>TOTAL OPEN POSITIONS</b>	<input type="text"/>

**Q3e – FEMALE STAFF**

**Q3e1** - Proportion of female staff in your total company staff in 2022  %

**Q3e2** - Is the CEO of your company female? Yes  No

**Q3e3** - Is the Chair of your Board female? Yes  No

**Q3f – MANAGEMENT TEAM & NEW APPOINTMENTS**

**Q3f1** - How many people are there on your management team in 2022? (including CEO, senior and middle management)

**Q3f2** - How many of the management team are female?

**Q3f3** - How many new appointments did you make to your management team in 2022?

**Q3f4** - How many of the new appointments were female?

**Q3g – BOARD MEMBERS**

Please ensure that all monetary amounts are in thousands.

For assistance, please dial 01-661 2467 or email [abr@insightsc.ie](mailto:abr@insightsc.ie)

**Q3g1** - How many people are there on your Board @ 31/12/2022?


**Q3g2** - How many of the Board are female?

--



**EXPENDITURE ITEMS**

	<b>Actual 2021 (€000's)</b>	<b>Estimate 2022 (€000's)</b>
--	-------------------------------------	---------------------------------------

**Q4 - PAYROLL** €  €

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, Government employment subsidies and recruitment agency fees).

Please record in Q5 to Q8 the costs associated with total sales **excluding cost of distribution sales (Q1g)**.

**Q5a - MATERIALS** €  €

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

**Q5b - MATERIALS SOURCED IN IRELAND (%)**  %  %

Estimated proportion of materials and components in Q5a produced in Republic of Ireland.

**Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)**  %  %

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

	<b>Actual 2021 (€000's)</b>	<b>Estimate 2022 (€000's)</b>
--	-------------------------------------	---------------------------------------

**Q6a - SERVICES** €  €

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

**Q6b - SERVICES SOURCED IN IRELAND (%)**  %  %

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

**Q6c - ENERGY** €  €

Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.

**Q7a - ROYALTIES** €  €

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

**Q7b - ROYALTIES PAID IN IRELAND (%)**  %  %

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

**Q8 - ALL OTHER EXPENSE ITEMS** €  €

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).

	<b>Actual 2021 (€000's)</b>	<b>Estimate 2022 (€000's)</b>
--	-------------------------------------	---------------------------------------

**Q9a - GROSS PROFIT - As per your Profit and Loss Account** €  €

**Q9b - NET PROFIT BEFORE TAX - As per your Profit & Loss Account** €  €

**TRAINING**

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

	<b>Actual 2021 (€000's)</b>	<b>Estimate 2022 (€000's)</b>
--	-------------------------------------	---------------------------------------

Please ensure that all monetary amounts are in thousands.

For assistance, please dial 01-661 2467 or email [abr@insights.ie](mailto:abr@insights.ie)

**Q10 - TRAINING**

€  €

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

**CORPORATION TAX**

**Q11 - Corporation Tax**

Did (or will) your company pay Corporation Tax in Ireland from 2021-2024?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid):
	Yes	No	Amount (€000's)
2021 (actual)			
2022 (estimate)			
2023 (forecast)			
2024 (forecast)			

**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 download [here](#).

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

Actual 2021  Actual 2022

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

**Q12b - RD&I EXPENDITURE (IN-HOUSE)**

Actual (€000's)  Actual (€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 add Q12b plus Q12c

**Q12e - RD&I TAX CREDITS**

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

	Yes	No
2020	<input type="checkbox"/>	<input type="checkbox"/>
2021	<input type="checkbox"/>	<input type="checkbox"/>
2022	<input type="checkbox"/>	<input type="checkbox"/>

Please ensure that all monetary amounts are in thousands.

For assistance, please dial 01-661 2467 or email [abr@insightsc.ie](mailto:abr@insightsc.ie)

**Q12f - INTELLECTUAL PROPERTY**

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

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

**Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX**

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

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

**Q12h - Relationship with Higher Education:** Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2022?

- Yes
- No
- Don't Know

**Q12i -** If Yes, please name the higher education institution(s):


Please ensure that all monetary amounts are in thousands.

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For assistance, please dial 01-661 2467 or email [abr@insights.ie](mailto:abr@insights.ie)

**RESEARCH PRIORITISATION**

**Q12j** - 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	ICT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Future Networks, <del>Communications</del> and Internet of Things
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security, Privacy, Robotics and Artificial Intelligence (including Machine Learning)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content and Applications, and Augmented Reality and Virtual Reality
1	2	3	Health and Wellbeing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connected Health and Independent Living
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Devices
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagnostics
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Therapeutics
1	2	3	Food
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food for Health
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smart and Sustainable Food Production and Processing
1	2	3	Energy, Climate Action and Sustainability
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Decarbonising the Energy System
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Living
1	2	3	Manufacturing and Materials
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced and Smart Manufacturing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing and Novel Materials
1	2	3	Services and Business Processes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Innovation in Services and Business Processes

Further Information on the Priority Areas is available to download [here](#) if required.

**GREEN TRANSFORMATION & DIGITISATION**

**Q13a** - Have you developed a climate action response (e.g. a sustainability plan) for your business?

- Yes
- No
- Don't know

**Q13b** - Does your company measure CO2 emissions?

- Yes
- No
- Don't know

Please ensure that all monetary amounts are in thousands.

For assistance, please dial 01-661 2467 or email [abr@insightsc.ie](mailto:abr@insightsc.ie)

**Q13c** - Which of the following energy resources does your company use?

Energy Resource	Yes	No	Don't know
Natural gas			
Fuel oil, kerosene, gas oil, diesel, LPG			
Other fuels (e.g. coal, petroleum coke)			
Biogas/biomass including renewable waste			
Onsite renewable electricity generation (e.g. heat pumps, solar panels, wind)			

**Q13d** - 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? Please tick one of the following options:

- No digital plan; limited or no digital initiatives in place
- Tentative plan in place; some experience of exploring and delivering digital initiatives
- Defined digital plans in place with activities underway
- Digital Innovation strategy in place with implementation activities underway
- Digital is fully embedded and optimised across all aspects of our business

**LOOKING TO THE FUTURE**

**Q14** – Based on your forecast for 2024 in Q1, please list your top 3 geographical growth markets in the next 3 years:

1)

2)

3)

**Q15a** – What are the labour market sourcing and retention challenges facing your company over the 1-2 years?

**Q15b** – What are the upskilling staff needs that your company will require to enable growth in the next 1-2 years?

**Q16** – What are the top 2 business challenges facing your business in 2023?


**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 secure online portal (or e-mail to [abr@insightsc.ie](mailto:abr@insightsc.ie))

Please ensure that all monetary amounts are in thousands.

For assistance, please dial +353 1 6612467 or email [abr@insightsc.ie](mailto:abr@insightsc.ie)

### Annual Business Report 2022/23

Conducted by Insight Statistical Consulting on behalf of the Department of Enterprise, Trade and Employment (DETE)/IDA Ireland.



**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 DETE's Business Information System (BIS).

**OTHER COMPANIES INCORPORATED IN THIS RETURN**

Apart from the primary entity referred to in the invitation email, please list all **other** companies, subsidiary companies and plants included in this return. Please indicate for each subsidiary the Companies Registration Office's (CRO) number – add additional cases as required.

Company Name(s)	CRO Number	Address(es)

Please commence report on next page >

Please ensure that all monetary amounts are in thousands.

For assistance, please dial +353 1 6612467 or email [abr@insightsc.ie](mailto:abr@insightsc.ie)



### EXPORT AND DOMESTIC REVENUES

If using accounting year in this form (rather than calendar year) provide date of year-end:

If not using Euro in this [form](#) please indicate other currency used (in relevant years):

**Q1 - Please provide in thousands the total value of your Revenues each year:**

	Actual 2021 (€000's)	Estimate 2022 (€000's)	Forecast 2023 (€000's)
<b>EXPORT REVENUES</b>			
<b>Q1a1) MANUFACTURED GOODS</b>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
<b>Q1a2) SERVICES</b>	€ <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 [here](#).

#### DOMESTIC REVENUES

<b>Q1b1) MANUFACTURED GOODS</b>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
<b>Q1b2) SERVICES</b>	€ <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 Q1g 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.

<b>Q1c) TOTAL SALES</b> 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).

#### PUBLIC SECTOR REVENUES

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

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

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

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

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

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

<b>Q1f - GLOBAL REVENUES</b>	<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).

<b>Q1g - DISTRIBUTION REVENUES</b>	€ <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).

### EXPORT MARKETS

**Q2 - EXPORT MARKETS** [i.e.](#) breakdown of Q1a into specific markets:

Please indicate the [final destination market](#) (rather than central distribution area):

	2021		2022	
	Goods	Services	Goods	Services
United Kingdom (inc. Northern Ireland)	%	%	%	%
Other EU Countries*	%	%	%	%
Other European Countries	%	%	%	%
North America, <a href="#">i.e.</a> USA and Canada	%	%	%	%
Asia	%	%	%	%
Elsewhere	%	%	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Please ensure that all monetary amounts are in thousands.



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\* 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.



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**EMPLOYMENT**

**Q3a - COMPANY STAFF**

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

	Actual 2021	Estimate 2022	Forecast 2023
<b>Full-Time:</b> Employed on a full-time basis (or on a contract of at least nine months) <del>with the exception of agency workers.</del>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Other:</b> All other employees <del>with the exception of agency workers</del> , can be part-time, short-term, temporary, or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL COMPANY STAFF</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>% Company Staff Earning €40,000+ per annum</b>	<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 2021	Estimate 2022	Forecast 2023
<b>Full-Time:</b> 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"/>
<b>Other:</b> All other classification of agency worker, can be part-time, short-term, temporary, or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL AGENCY STAFF</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Q3c - GLOBAL EMPLOYMENT</b>	<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.

**Q3d - FEMALE STAFF**

Proportion of female staff in your Irish operation @ 31/12/22

 %

Is the Head/Managing Director in Ireland female?

 Yes  
 No

If you have a Board in Ireland, is the Chair of that Board female?

 Yes  
 No  
 Not Applicable

**Q3e - Senior Leadership Team**

How many people are there on your Senior Leadership team in Ireland in 2022?

(including Managing Director, Executive Level, and middle management/Senior VP)?

How many of the Senior Leadership team in Ireland are female?

**Q3f - New Appointments**

How many new appointments did you make to your Senior Leadership team in 2022?

How many of the new appointments were female?

Please ensure that all monetary amounts are in thousands.

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**CURRENT EXPENDITURE**

**Q4a - PAYROLL** €  Actual 2021 (€000's) €  Estimate 2022 (€000's)

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].

**Q4b - Do you have more than one office, or premises, located in Ireland?**  Yes  No

**Q4c - If Yes, please provide a breakdown of all payroll expenditure by regions in which these premises are located:**

	2021	2022
<b>Dublin</b>	<input type="text"/> %	<input type="text"/> %
<b>Mid-East:</b> Wicklow, Kildare, Meath, Louth	<input type="text"/> %	<input type="text"/> %
<b>South-West:</b> Cork, Kerry	<input type="text"/> %	<input type="text"/> %
<b>West:</b> Galway, Mayo, Roscommon	<input type="text"/> %	<input type="text"/> %
<b>Border:</b> Donegal, Sligo, Leitrim, Cavan, Monaghan	<input type="text"/> %	<input type="text"/> %
<b>Mid-West:</b> Clare, Tipperary, Limerick	<input type="text"/> %	<input type="text"/> %
<b>South-East:</b> Waterford, Kilkenny, Carlow, Wexford	<input type="text"/> %	<input type="text"/> %
<b>Midland:</b> Longford, Westmeath, Offaly, Laois	<input type="text"/> %	<input type="text"/> %
<b>Total</b>	<b>100%</b>	<b>100%</b>

I don't know

Please record costs associated with total revenues in Q1c, i.e. excluding cost of distribution sales (Q1g).

**Q5a - MATERIALS** €  €

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].

**Q5b - MATERIALS SOURCED IN IRELAND (%)**  %  %

Estimated proportion of materials and components in Q5a produced in Republic of Ireland.

**Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)**  %  %

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

**Q6a - SERVICES** €  €

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

**Q6b - SERVICES SOURCED IN IRELAND not including Royalties (%)**  %  %

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

**Q6c - ENERGY** €  €

Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.

**Q6d - Which of the following energy resources does your company use in Ireland?**

Energy Resource	Yes	No	Don't know
Natural gas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oil ( <u>e.g.</u> fuel oil, gas oil, diesel, kerosene, LPG, petroleum coke)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Coal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Biomass & renewable waste	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onsite renewable electricity generation ( <u>e.g.</u> wind, heat pumps, solar panels)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q7a - ROYALTIES** €  €

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

**Q7b - ROYALTIES PAID IN IRELAND (%)**  %  %

Please ensure that all monetary amounts are in thousands.

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

**Q8 - ALL OTHER EXPENSE ITEMS** €  €

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.).

### TRAINING

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

**Q9 - TRAINING** Actual 2021 (€000's) Estimate 2022 (€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). The cost of mandatory training (e.g. required by law or for compliance) and non-mandatory training should be included.

### CAPITAL EXPENDITURE

**Q10 - CAPITAL EXPENDITURE** Actual 2021 (€000's) Estimate 2022 (€000's)  
 €  €

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:

	Actual 2021	Estimate 2022
Building & Structures	<input type="text"/> %	<input type="text"/> %
Machinery & Equipment	<input type="text"/> %	<input type="text"/> %
Other	<input type="text"/> %	<input type="text"/> %
<b>Total</b>	<b>100%</b>	<b>100%</b>

### CORPORATION TAX

**Q11 - Corporation Tax**

Did (or will) your company pay Corporation Tax in Ireland from 2021-2024?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid):
	Yes	No	Amount (€000's)
2021 (actual)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
2022 (estimate)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
2023 (forecast)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
2024 (forecast)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

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**RESEARCH, DEVELOPMENT & INNOVATION**

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

**Q12a - IN-HOUSE RD&I EMPLOYMENT**

**Q12a1 - RESEARCHERS/TECHNICIANS**

Actual 2021	Estimate 2022
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>

Number of researchers/technicians employed (full time equivalent) on RD&I within your Republic of Ireland operation.

**Q12a2 - SUPPORT STAFF**

<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
--	--

Number of support staff employed (full time equivalent) on RD&I within your Republic of Ireland operation.

**Q12b - RD&I EXPENDITURE (IN-HOUSE)**

Actual 2021 (€000's)	Estimate 2022 (€000's)
€ <input style="width: 90%;" type="text"/>	€ <input style="width: 90%;" type="text"/>

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.

**Q12c - RD&I EXPENDITURE (OUTSOURCED)**

€ <input style="width: 90%;" type="text"/>	€ <input style="width: 90%;" type="text"/>
--	--

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.

**Q12d - OVERALL RD&I EXPENDITURE**

€ <input style="width: 90%;" type="text"/>	€ <input style="width: 90%;" type="text"/>
--	--

Please estimate the total expenditure on RD&I, [i.e.](#) Q12b plus Q12c

**Q12e - PERCENTAGE OF GLOBAL RD&I**

<input style="width: 90%;" type="text"/> %	<input style="width: 90%;" type="text"/> %
--	--

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?



**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:

	2020	2021	2022
Yes	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>
No	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>	<input style="width: 40px; height: 20px;" type="text"/>

**Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX**

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

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

**Q12h - INTELLECTUAL PROPERTY**

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

- Patent(s)
- Registered design(s)
- Registered trademark(s)
- Trade secret(s)
- Web domain name(s)
- Licensed intellectual property from a third party
- Copyright
- Don't know

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None of the above

**Q13a - RELATIONSHIP WITH HIGHER EDUCATION:**

Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2022?

Yes  
 No  
 Don't know

**Q13b -** If [Yes](#) to Q13a, please name the higher education institution(s):


**RESEARCH PRIORITISATION**

**Q13c -** 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	ICT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Future Networks, <a href="#">Communications</a> and Internet of Things
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security, Privacy, Robotics and Artificial Intelligence (including Machine Learning)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content and Applications, and Augmented Reality and Virtual Reality
1	2	3	Health and Wellbeing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connected Health and Independent Living
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Devices
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagnostics
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Therapeutics
1	2	3	Food
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food for Health
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smart and Sustainable Food Production and Processing
1	2	3	Energy, Climate Action and Sustainability
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Decarbonising the Energy System
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Living
1	2	3	Manufacturing and Materials
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced and Smart Manufacturing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing and Novel Materials
1	2	3	Services and Business Processes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Innovation in Services and Business Processes

Further Information on the Priority Areas is available to download [here](#) if required.

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**SUSTAINABILITY**

**Q14a** – Do you measure the CO2 emissions from your operation in Ireland, e.g. operations, buildings, transport / travel?

- Yes
- No
- Don't know

**Q14b** – Have you developed a climate action response/plan for your business in Ireland?

- Yes
- No
- Don't know

**Q14c** – If Yes, what are you planning to do?

Please rank as many that are relevant, 1 being the highest.

- Purchase and use more renewable energy
- Generate on-site renewable energy for your company's own use
- Focus on reducing emissions associated with – Operations, buildings, transport/travel
- Biodiversity Initiatives
- Pollution Prevention and Control
- Circular Economy Initiatives (Reuse and Recycle)
- Sustainable use of Water
- Other, please specify: .....

**Q14d** – What are the main challenges in developing your company's climate action response?

Please rank your top 3 challenges, 1 being the highest.

- Prioritisation/time to consider the climate challenge
- Capacity to develop a plan
- Availability of external supports
- Availability of funding for this investment
- Other, please specify: .....

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### DIGITALISATION

**Digitalisation is the process of leveraging digital data and technologies to drive value.**

**Q15a** – To what extent will Digitalisation change your business model over the next 2 years?

Please rate on a scale from 1 (Not Significantly) to 10 (Significantly)

1	<input type="checkbox"/>	Not Significantly
2	<input type="checkbox"/>	
3	<input type="checkbox"/>	
4	<input type="checkbox"/>	
5	<input type="checkbox"/>	
6	<input type="checkbox"/>	
7	<input type="checkbox"/>	
8	<input type="checkbox"/>	
9	<input type="checkbox"/>	
10	<input type="checkbox"/>	Significantly

**Q15b** – 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? Please tick one of the following options:

<input type="checkbox"/>	No digital plan; limited or no digital initiatives in place
<input type="checkbox"/>	Tentative plan in place; some experience of exploring and delivering digital initiatives
<input type="checkbox"/>	Defined digital plans in place with activities underway
<input type="checkbox"/>	Digital Innovation strategy in place with implementation activities underway
<input type="checkbox"/>	Digital if fully embedded and optimised across all aspects of our business

### FUTURE SKILLS NEEDS & CHALLENGES

**A strategic talent development plan identifies the skills needs required for an organisation's (future) goals and sets out a plan to address those skills needs and reach those goals.**

**Q16a** – Have you developed a strategic talent development plan for your operation in Ireland?

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

**Q16b** – Do you have a dedicated resource in Ireland to drive the implementation of your strategic talent development plan?

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

**Q16c** – What percentage\* of your workforce in Ireland will be upskilled or reskilled over the next 2 years?

<input type="text"/>	%
<input type="checkbox"/>	Don't know

\* Please provide a best estimate for non-routine, future-focused **upskilling** and reskilling of a significant nature. Indicators of significance include the degree to which core skills must change, upskilling/reskilling that is required for the operation to remain competitive, etc.

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**Q16d** – What are the critical skills needs that your Irish operation will require over the next 2 years to achieve your objectives across the following categories?

Category	Critical skills <u>needs</u>
Innovation	
Sustainability & Climate	
Digitalisation	
Leadership development	
Any other objectives	

**Q17** – Please rank the top three challenges facing your Irish operation in 2023, where 1 is the most important:

<input type="checkbox"/>	Global economic uncertainty
<input type="checkbox"/>	Inflation
<input type="checkbox"/>	Energy Costs
<input type="checkbox"/>	Interest rates
<input type="checkbox"/>	Availability of Talent
<input type="checkbox"/>	National capacity constraints <u>e.g.</u> housing, construction sector and infrastructure
<input type="checkbox"/>	Climate change
<input type="checkbox"/>	Geopolitical tensions
<input type="checkbox"/>	Supply Chain challenges
<input type="checkbox"/>	<del>Technological</del> change, e.g. digitalisation
<input type="checkbox"/>	Capacity to innovate
<input type="checkbox"/>	Other, please specify:

**Thank you very much!**

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Please ensure that all monetary amounts are in thousands.