

**Forfás**



**ENTERPRISE  
STATISTICS**

at a Glance, 2009

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at a Glance, 2009

# Introduction

“Enterprise Statistics at a Glance 2009” brings together data from publications by Forfás, the Central Statistics Office and other bodies. It contains a summary of statistics on a number of areas relevant to the performance of the Irish enterprise sector: the economic context; economy expenditure and output; Ireland’s international trade in goods and services; inward and outward foreign direct investment flows; and business R&D and innovation. Some strong messages emerge from the data.

The contribution of net exports to economic growth has increased since 2006. Personal consumption and investment in Ireland are forecast to continue to decrease rapidly from 2008. General government debt as a percentage of GDP is forecast to increase and will be over double its 2007 level in 2009.

The total expenditure in the Irish economy by firms supported by the enterprise agencies amounted to €36 billion in 2007 and was by foreign and Irish owned companies equally.

Foreign companies export about 91 per cent of total goods exports. Exports of services increased between 2007 and 2008, led by increases in computer services and business services exports. The UK is by far Ireland’s largest market for services exports and Asia had the largest increase in the level of services exports between 2006 and 2007. In terms of goods exports to the

US, Ireland ranked 14th in the world in 2008. In quarter 1 2009, Ireland has jumped 6 places to 9th in the world as a source country for imports to the US.

The stock of inward direct investment in Ireland was €131.4 billion in 2007, which is almost double the EU average in terms of its proportion of GDP at 73.6 per cent. Just over 60 per cent of this investment comes from countries in the EU27, including 6 per cent from the UK. The US accounts for 15 per cent of total direct investment, with Ireland ranking 10th in the world as a destination for US FDI (5th in the EU). Ireland has a larger stock of outward direct investment as a percentage of GDP than the EU average and the US.

The level of R&D and innovation in the enterprise base is continuing to grow with 47 per cent of all enterprises in Ireland innovation active and these firms contribute 75.1 per cent of total enterprise turnover.

Altogether, the statistics in this booklet highlight some of the key trends in the activities of enterprises based in Ireland and help describe how they are developing and changing over recent years.

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# Section 1

## Economic Context

- 1.1 Economic Environment at a Glance
- 1.2 GDP Growth of Main Trading Partners
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- 1.4 Contribution of Net Exports to Irish Economic Growth, constant prices, 2002-2008
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- 1.6 Trade of Goods and Services, outlook 2009-2010, various countries
- 1.7 Index of Manufacturing Output Volume and Services Exports, 2000-2008

## 1.1 Economic Environment at a Glance

	2004	2005	2006	2007	2008	2009 (f)	2010 (f)	2011 (f)
Personal consumption change %	3.6	6.6	6.6	5.9	-1.0	-7.8	-3.7	1.1
Investment change %	9.6	14.7	4.0	2.3	-15.5	-27.0	-16.0	7.4
General government debt as % of GDP	29.7	27.5	24.9	25.0	43.2	59.0	73.0	78.0
<b>Other Countries:</b>								
UK	-	-	-	44.2	50.1	55.1	60.3	-
France	-	-	-	64.0	65.4	67.7	69.9	-
Euro area	-	-	-	66.0	66.6	67.2	67.6	-
General Government Balance as % of GDP	1.4	1.2	3.0	0.2	-7.1	-10.7	-10.8	-8.5

Note: (f) forecast.

Source: Department of Finance, *Supplementary Budget April 2009 "Macroeconomic and Fiscal Framework"*, *"Monthly Economic Bulletin" various edition*, European Commission data for Other Countries and *"Maastricht Returns" various editions*.

## 1.2 GDP growth of main trading partners

	% growth		
	2008	2009 (f)	2010 (f)
Euro area	0.7	-4.1	-0.3
UK	0.7	-3.7	-0.2
US	1.1	-4.0	0.0
World Trade Growth	2.5	-13.2	1.5

Source: Department of Finance, *Supplementary Budget April 2009 "Macroeconomic and Fiscal Framework"*.

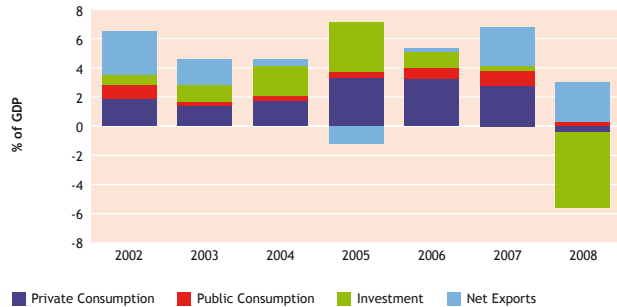
## 1.3 Number Employed and Unemployment rate in Ireland over time, 2004-2011

	'000							
	2004	2005	2006	2007	2008	2009 (f)	2010 (f)	2011 (f)
Employment (using figure for Q1 for each year)	1,835.9	1,908.3	1,998.1	2,074.9	2,135.1	1,968.6	1,878.0	1,887.4
Unemployment rate (%)	4.4	4.4	4.4	4.6	6.4	12.6	15.5	15.0
Unemployment (using figure for December of each year, numbers of persons)	159.8	157.1	156.7	172.1	293.1	-	-	-

Source: Central Statistics Office (CSO), *"Quarterly National Household Survey" and "Live Register"*, various editions, and Department of Finance, *Supplementary Budget April 2009 "Macroeconomic and Fiscal Framework"*.



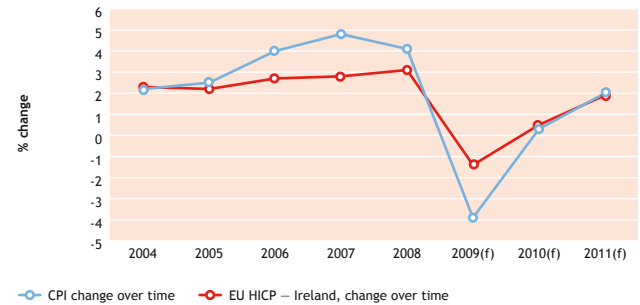
## 1.4 Contribution of Net Exports to Irish Economic Growth, constant prices, 2002-2008



Source: European Commission, AMECO Database, June 2009.

% of GDP growth	2002	2003	2004	2005	2006	2007	2008
Private Consumption	1.81	1.36	1.71	3.26	3.18	2.74	-0.37
Public Consumption	1.01	0.27	0.34	0.47	0.82	1.05	0.28
Investment	0.68	1.20	2.02	3.42	1.06	0.34	-5.24
Net Exports	2.96	1.73	0.54	-1.23	0.25	2.61	2.73

## 1.5 Price Developments, 2004-2011

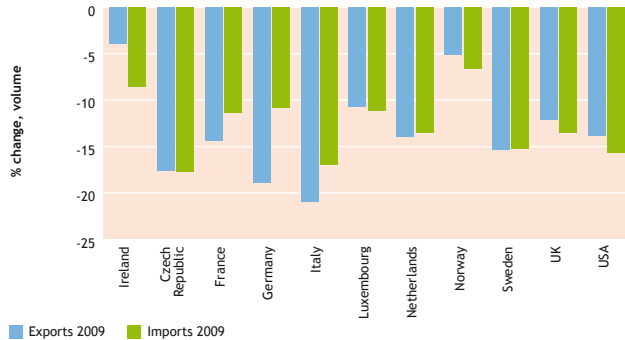


Note: (f) forecast.

Source: CSO, "Consumer Price Index", April 2009, and, Department of Finance, Supplementary Budget April 2009 "Macroeconomic and Fiscal Framework".

% change	2004	2005	2006	2007	2008	2009 (f)	2010 (f)	2011 (f)
CPI change over time	2.2	2.5	4.0	4.8	4.1	-3.9	0.3	2.0
EU HICP - Ireland, change over time <sup>1</sup>	2.3	2.2	2.7	2.8	3.1	-1.4	0.5	1.9

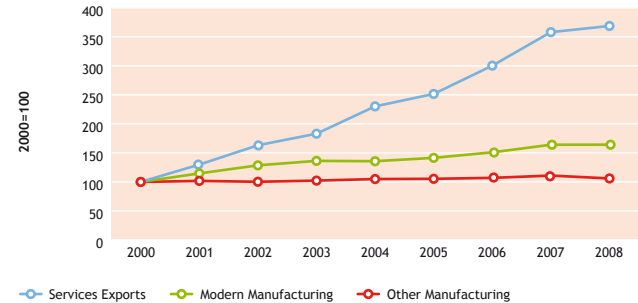
## 1.6 Trade of Goods and Services, outlook 2009-2010, various countries



Source: Ireland data from ESRI "Quarterly Commentary, Summer 2009" and other countries data from OECD, "Economic Outlook 2009".

% change, volume	2009		2010	
	Exports	Imports	Exports	Imports
Ireland	-3.9	-8.6	-1.4	-4.8
Czech Republic	-17.6	-17.7	2.4	0.4
France	-14.4	-11.4	-2.4	-1.8
Germany	-18.9	-10.8	0.9	0.9
Italy	-20.9	-17.0	-0.7	-0.2
Luxembourg	-10.7	-11.1	-0.7	-0.9
Netherlands	-13.9	-13.5	-0.5	-0.6
Norway	-5.1	-6.6	0.1	1.6
Sweden	-15.3	-15.2	1.4	0.3
UK	-12.1	-13.5	1.0	-1.0
USA	-13.8	-15.7	1.6	1.2

## 1.7 Index of Manufacturing Output Volume and Services Exports, 2000-2008



Source: Central Statistics Office (CSO), "Industrial Production & Turnover" 2009, and "Balance of Payments".

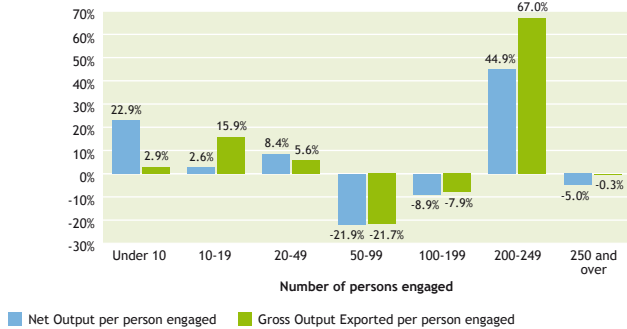
Base year = 2000	2000	2001	2002	2003	2004	2005	2006	2007	2008
Services Exports	100.0	129.9	163.2	183.1	230.2	251.6	300.3	353.3	377.5
Modern Manufacturing	100.0	114.7	128.6	136.3	135.7	141.5	151.0	164.1	164.2
Other Manufacturing	100.0	101.8	100.3	102.3	105.0	105.4	107.0	111.0	106.0

## Section 2

### Output, Value Added and Expenditure

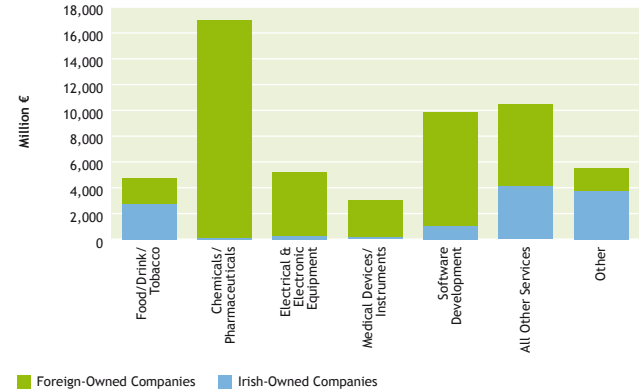
- 2.1 Change in Net Output and Gross Output Exported, by number of persons engaged, 2006
- 2.2 Value Added of Agency Assisted Firms by sector, current prices, 2007
- 2.3 Direct Economy Expenditure by Agency Assisted Firms by sector, 2007

### 2.1 Change in Net Output and Gross Output Exported, by number of persons engaged<sup>2</sup>, 2006



Source: CSO, "Census of Industrial Production, 2006".

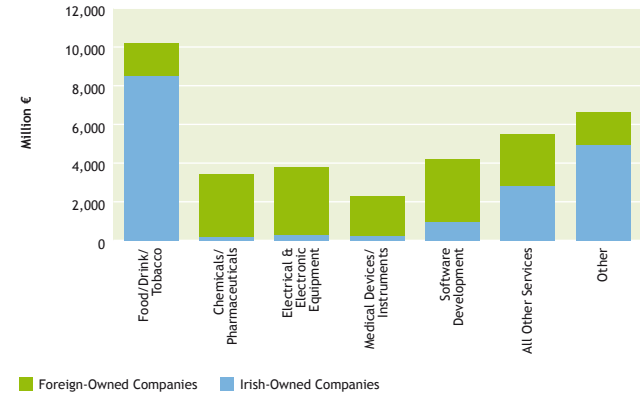
### 2.2 Value Added<sup>3</sup> of Agency Assisted Firms<sup>4</sup> by Sector, current prices, 2007



Source: Forfás, "Annual Business Survey of Economic Impact (ABSEI)", 2007.

	Million € (current prices) 2007 Value Added		% change from 2001 to 2007 (constant prices) <sup>9</sup>	
	Irish-Owned Companies	Foreign- Owned Companies	Irish-Owned Companies	Foreign- Owned Companies
Food/Drink/Tobacco	2,715	2,023	+23.1	+52.7
Chemicals/Pharmaceuticals	97	16,850	+4.3	+31.7
Electrical & Electronic equipment	244	4,922	-15.9	-34.8
Medical Devices/instruments	142	2,901	+145.3	+45.2
Software Development	1,031	8,805	-1.4	+8.8
All other services	4,086	6,416	+112.2	+100.8
<b>Other:</b>				
Agriculture/Fishing/Mining	69	-	-8.5	0.0
Textiles/Clothing/Leather	136	24	-28.2	-59.1
Wood & Wood Products	289	73	+72.5	+89.0
Print & Publishing	354	171	-1.5	+61.1
Rubber & Plastic products	294	237	+58.8	+47.6
Non-metallic Minerals	1,093	185	+167.4	+0.9
Basic & fabricated metal products	706	199	+62.2	-18.6
Machinery n.e.c. <sup>6</sup>	535	464	+107.4	+64.8
Transport Equipment	64	376	+40.3	+53.2
Manufacturing n.e.c.	229	52	+40.3	-18.7
<b>Total</b>	<b>12,084</b>	<b>43,698</b>	<b>+51.5</b>	<b>+19.0</b>

### 2.3 Direct Economy Expenditure<sup>7</sup> by Agency Assisted Firms by Sector, 2007



Source: Forfás, ABSEI 2007.

	Million € (current prices) 2007 Direct Economy Expenditure		% change from 2001 to 2007 (constant prices) <sup>9</sup>	
	Irish-Owned Companies	Foreign- Owned Companies	Irish-Owned Companies	Foreign- Owned Companies
Food/Drink/Tobacco	8,482	1,726	+14.1	+28.5
Chemicals/Pharmaceuticals	203	3,212	-3.9	+60.1
Electrical & Electronic equipment	293	3,476	-14.0	-20.1
Medical Devices/instruments	220	2,073	+112.5	+105.1
Software Development	952	3,252	-4.6	-25.7
All other services	2,795	2,719	+4.4	-9.9
<b>Other:</b>				
Agriculture/Fishing/Mining	236	-	-28.0	0.0
Textiles/Clothing/Leather	157	30	-37.0	-78.3
Wood & Wood Products	523	159	+12.3	+27.6
Print & Publishing	441	137	-3.3	-34.6
Rubber & Plastic products	319	233	+42.0	+21.8
Non-metallic Minerals	1,245	103	+30.8	-46.6
Basic & fabricated metal products	935	247	+59.8	-15.4
Machinery n.e.c.	549	303	+52.7	-7.6
Transport Equipment	123	402	+82.0	+22.2
Manufacturing n.e.c.	386	100	+49.7	+15.1
<b>Total</b>	<b>17,859</b>	<b>18,172</b>	<b>+14.4</b>	<b>+3.4</b>

## Section 3

### International Trade in Goods

- 3.1 Ireland's Merchandise and Services Exports, current prices, 2001-2008
- 3.2 Index of Ireland's Goods Trade by Volume, 2000-2007
- 3.3 Ireland's Goods Trade by Value, constant prices, 2001-2008
- 3.4 Composition of Ireland's Goods Exports, constant prices, 2000-2008
- 3.5 Destination of Ireland's Goods Exports, 2008
- 3.6 Destination of Ireland's Goods Exports by Firm Ownership, 2006
- 3.7 Composition of Ireland's Goods Imports, constant prices, 2000-2008
- 3.8 Geographic Distribution of Ireland's Goods Imports, 2008
- 3.9 Share of Total Extra and Intra EU27 Goods Exports, 2004 and 2008
- 3.10 Share of Total Extra and Intra EU27 Goods Imports, 2004 and 2008
- 3.11 Ireland's ranking in USA and UK Goods Imports and Exports, 2006-2008

### 3.1 Ireland's Merchandise and Services Exports, current prices, 2001-2008



Source: CSO, Database Direct.

Note: 2008 figures are provisional.

Million €	2001	2002	2003	2004	2005	2006	2007	2008
Services Exports	28,562	31,589	37,133	42,424	48,219	57,069	67,960	69,203
Merchandise Exports	92,690	93,675	82,076	84,410	86,732	86,772	89,226	86,287
<b>Total Exports</b>	<b>121,252</b>	<b>125,264</b>	<b>119,209</b>	<b>126,834</b>	<b>134,951</b>	<b>143,841</b>	<b>157,186</b>	<b>155,490</b>
Services Imports	41,822	45,370	48,223	52,625	57,521	63,867	69,081	74,574
Merchandise Imports	57,384	55,628	47,864	51,105	57,465	60,857	63,485	57,130
<b>Total Imports</b>	<b>99,206</b>	<b>100,998</b>	<b>96,087</b>	<b>103,730</b>	<b>114,986</b>	<b>124,724</b>	<b>132,566</b>	<b>131,704</b>
<b>Net Balance of trade</b>	<b>22,046</b>	<b>24,266</b>	<b>23,122</b>	<b>23,104</b>	<b>19,965</b>	<b>19,117</b>	<b>24,620</b>	<b>23,786</b>

### 3.2 Index of Ireland's Goods Trade by Volume, 2000-2007

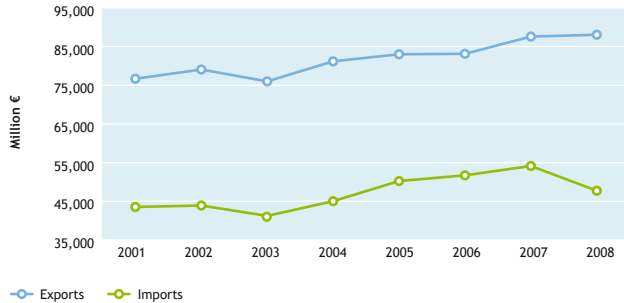


Source: World export volumes from "WTO International Trade Statistics 2008". Irish data from CSO, "External Trade Bulletin", March 2009.

Volume Index (base year = 2000)	2000	2001	2002	2003	2004	2005	2006	2007
Exports Volume	100	105	108	104	111	114	114	120
Imports Volume	100	100	101	94	103	115	118	124
World Exports Volume	100	100	103	109	120	127	138	146



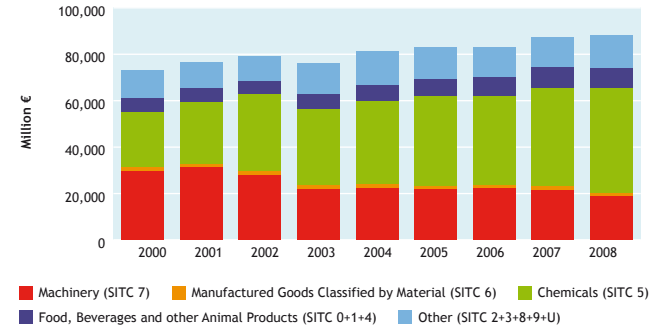
### 3.3 Ireland's Goods Trade by Value, constant prices<sup>9</sup>, 2001-2008



Source: CSO, "External Trade Bulletin", various editions.

Million €	2001	2002	2003	2004	2005	2006	2007	2008	% change Q1 <sup>10</sup> 2008 and Q1 2009
Exports	76,667	79,051	75,996	81,163	82,997	83,115	87,562	88,048	-4.5
Imports	43,539	43,905	41,227	45,027	50,232	51,706	54,123	47,728	-22.2
Trade Surplus	33,128	35,145	34,769	36,136	32,766	31,409	33,440	40,320	+21.2

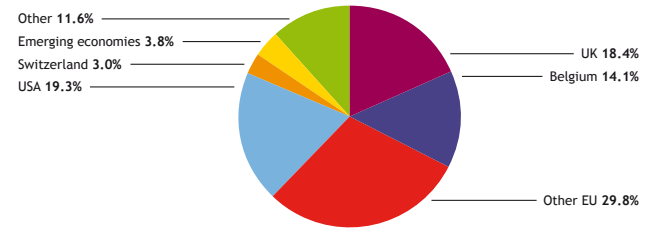
### 3.4 Composition of Ireland's Goods Exports, constant prices<sup>11</sup>, 2000-2008



Source: CSO, Database Direct and "External Trade Bulletin".

SITC Product Groups <sup>12</sup>	Section	Million €									
		2000	2001	2002	2003	2004	2005	2006	2007	2008	
0	Food and live animals	5,172	4,798	4,877	5,351	5,830	6,105	6,738	7,461	7,188	
1	Beverages and tobacco	833	815	846	1,025	997	1,056	1,302	1,381	1,253	
2	Crude materials, inedible, except fuels	819	788	728	801	953	1,031	1,430	1,510	1,301	
3	Mineral fuels, lubricants and related products	248	246	305	186	384	590	539	674	849	
4	Animal and vegetable oils, fats and waxes	24	20	22	29	24	18	19	27	43	
5	Chemicals and related products nes <sup>13</sup>	23,792	26,698	32,963	33,135	36,050	38,680	38,023	42,266	45,079	
6	Manufactured goods classified chiefly by material	1,716	1,617	1,625	1,659	1,747	1,679	1,642	1,784	1,691	
7	Machinery & transport equipment	29,575	31,105	27,992	21,779	22,053	21,732	22,209	21,400	18,700	
8	Miscellaneous manufactured articles	7,708	7,418	6,991	8,756	9,529	8,676	8,286	8,331	9,061	
9	Commodities & transactions not classified elsewhere	3,059	3,158	2,700	3,273	3,595	3,432	2,922	2,728	2,847	
U	Unclassified	0	0	0	0	0	0	6	0	0	
	<b>Total</b>	<b>72,947</b>	<b>76,663</b>	<b>79,051</b>	<b>75,996</b>	<b>81,163</b>	<b>82,997</b>	<b>83,115</b>	<b>87,562</b>	<b>88,012</b>	

### 3.5 Destination of Ireland's Goods Exports, 2008

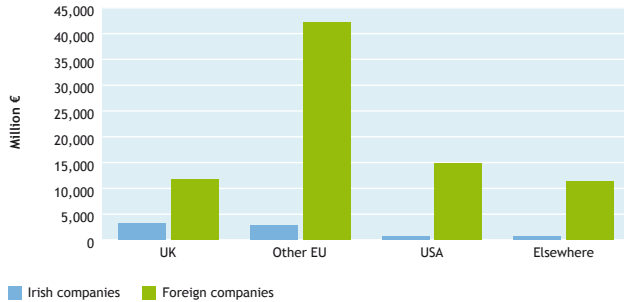


Source: CSO, "External Trade Bulletin", December 2008.

Note: CSO classifies exports by country of final destination. The last country to which the goods are specifically directed on their outward movement from the State is regarded as their final destination. This is not necessarily the country in which the goods will be unshipped or that in which they will be finally consumed.

Million €	2008	% of total 2008 goods exports
UK	15,856.9	18.4
Belgium	12,190.1	14.1
Other EU	25,663.4	29.8
USA	16,657.1	19.3
Switzerland	2,554.9	3.0
Emerging economies <sup>14</sup>	3,286.5	3.8
Other	10,009.0	11.6
<b>Total</b>	<b>86,217.9</b>	<b>100.0</b>

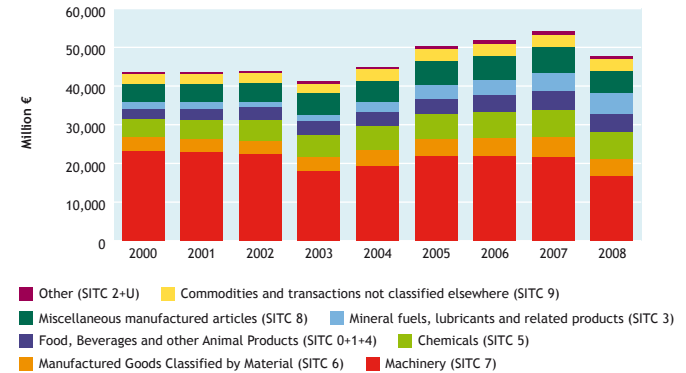
### 3.6 Destination of Ireland's Goods Exports by Firm Ownership, 2006



Source: CSO, "Census of Industrial Production 2006".

Million €	UK	Other EU	USA	Elsewhere	Total
Irish companies	3,268.8	2,724.0	602.9	668.3	7,263.9
Foreign companies	11,668.7	42,199.3	14,865.7	11,269.1	79,922.9

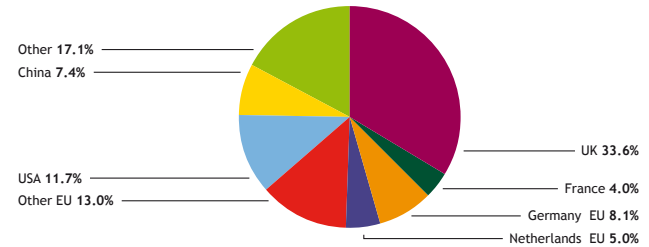
### 3.7 Composition of Ireland's Goods Imports, constant prices<sup>15</sup>, 2000-2008



Source: CSO, Database Direct and "External Trade Bulletin".

SITC Product Groups	Section	Million €									
		2000	2001	2002	2003	2004	2005	2006	2007	2008	
0	Food and live animals	2,207.6	2,364.3	2,491.3	2,721.6	2,883.8	3,217.8	3,471.6	3,915.5	3,839.1	
1	Beverages and tobacco	407.9	515.5	575.0	607.8	613.3	678.4	683.8	769.9	660.3	
2	Crude materials, inedible, except fuels	640.4	606.1	631.7	680.5	743.5	817.1	908.2	939.9	702.5	
3	Mineral fuels, lubricants and related products	1,796.7	1,683.4	1,525.0	1,696.0	2,478.9	3,514.3	4,009.7	4,883.4	5,425.3	
4	Animal and vegetable oils, fats and waxes	95.3	93.2	91.4	104.0	102.9	113.2	138.4	136.7	171.8	
5	Chemicals and related products nes	4,769.7	4,810.7	5,463.5	5,940.9	6,290.4	6,485.1	6,766.0	6,928.0	6,886.3	
6	Manufactured goods classified chiefly by material	3,398.9	3,331.4	3,424.1	3,656.3	4,070.3	4,324.5	4,731.8	5,185.3	4,529.7	
7	Machinery & transport equipment	23,234.0	22,931.8	22,349.9	17,857.0	19,351.2	21,854.8	21,725.2	21,635.8	16,623.6	
8	Miscellaneous manufactured articles	4,603.9	4,779.7	4,827.1	5,428.6	5,578.4	6,194.4	6,253.2	6,487.8	5,663.5	
9	Commodities & transactions not classified elsewhere	2,524.0	2,422.8	2,515.6	2,534.2	2,914.1	3,031.9	3,017.5	3,238.6	3,168.0	
U	Unclassified	0.5	0.0	10.8	0.1	0.0	0.0	0.0	1.4	0.0	
	<b>Total</b>	<b>43,678.7</b>	<b>43,538.8</b>	<b>43,905.3</b>	<b>41,227.1</b>	<b>45,026.8</b>	<b>50,231.5</b>	<b>51,705.5</b>	<b>54,122.4</b>	<b>47,670.3</b>	

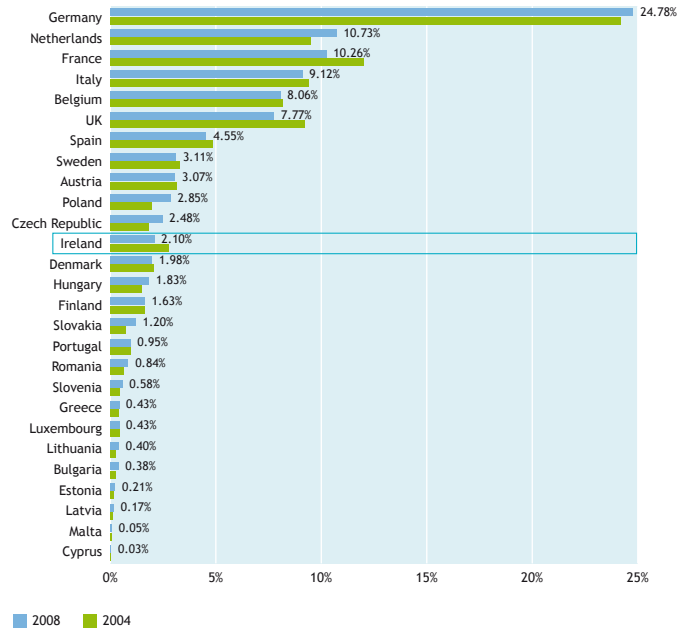
### 3.8 Geographic Distribution of Ireland's Goods Imports, 2008



Source: CSO, "External Trade Bulletin", December 2008.

Million €	2008	% total
UK	19,132.5	33.6
France	2,256.5	4.0
Germany	4,622.6	8.1
Netherlands	2,862.8	5.0
Other EU	7,430.1	13.0
USA	6,675.7	11.7
China	4,224.4	7.4
Other	9,759.7	17.1
<b>Total</b>	<b>56,964.3</b>	<b>100</b>

### 3.9 Share of Total Extra and Intra EU27 Goods Exports, 2004 and 2008

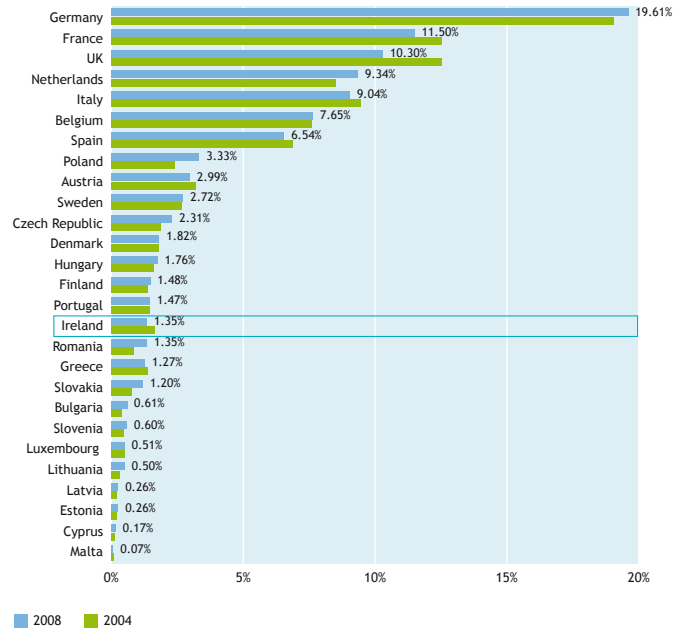


Source: Eurostat, Member states (EU27) trade by BEC product group.

Note: 2008 values are specified in chart.

	% Share EU27 Exports		% change in share of EU27 trade Q1
	2004	2008	2009
Luxembourg	0.43	0.43	+4.6
Greece	0.41	0.43	+6.76
Finland	1.64	1.63	-16.66
Ireland	2.79	2.1	+26.62
UK	9.24	7.77	-2.97
Belgium	8.16	8.06	+1.89
Italy	9.4	9.12	-1.49
France	12.02	10.26	-0.29
Netherlands	9.5	10.73	+1.77
Germany	24.18	24.78	+0.56

### 3.10 Share of Total Extra and Intra EU27 Goods Imports, 2004 and 2008



Source: Eurostat, Member states (EU27) trade by BEC product group

Note: 2008 values are specified in chart.

	% Share EU27 Imports		% change in share of EU27 trade Q1
	2004	2008	2009
Luxembourg	0.53	0.51	+7.86
Ireland	1.65	1.35	+2.98
Finland	1.37	1.48	-12.02
Denmark	1.81	1.82	+11.71
Czech Republic	1.86	2.31	-5.39
Sweden	2.67	2.72	-9.85
UK	12.52	10.3	-3.46
France	12.53	11.5	+4.43
Germany	19.05	19.61	+8.33

### 3.11 Ireland's Ranking in USA and UK Goods Imports and Exports, 2006-2008

Goods Exports from:	2006	2007	2008	Q1 2008	Q1 2009	change Q1 2008 to 2009
USA	23rd	27th	30th	27th	23rd	+4
UK	4th	4th	4th	4th	5th	-1

Goods Imports to:	2006	2007	2008	Q1 2008	Q1 2009	change Q1 2008 to 2009
USA	14th	15th	14th	15th	9th	+6
UK	10th	9th	9th	9th	8th	+1

Note: this table shows Ireland's ranking as a destination country for US and UK exports and as a source country for US and UK imports. For example, in Q1 2009 Ireland ranked 9th as the source of US imports.

Source: USA statistics from Bureau of Economic Analysis, and UK statistics from UK "Monthly Trade Statistics", ONS statistics.

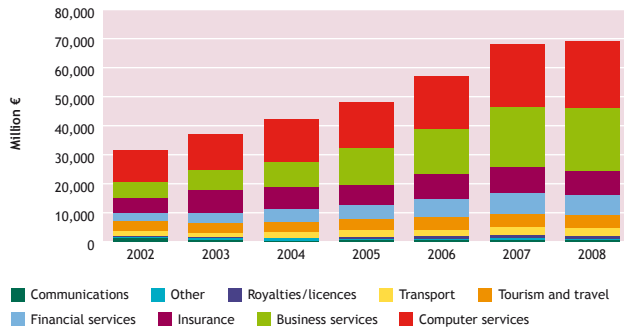
## Section 4

### International Trade in Services

- 4.1 Ireland's Services Exports, 2002-2008
- 4.2 Composition and Geographical Distribution of Ireland's Services Exports, 2007
- 4.3 Geographical Distribution of Ireland's Services Exports, 2007
- 4.4 Ireland's Services Imports, 2002-2008
- 4.5 Composition and Geographical Distribution of Ireland's Services Imports, 2007
- 4.6 IFSC Services Exports and Imports, 2004-2008
- 4.7 Share of Total Extra and Intra EU27 Services Exports, 2005 and 2007
- 4.8 Share of Total Extra and Intra EU27 Services Imports, 2005 and 2007
- 4.9 Ireland's ranking, USA Services Imports and Exports, 2006-2007

**Please note:** Charts and tables comparing services trade over time use current prices. Data for constant prices is unavailable.

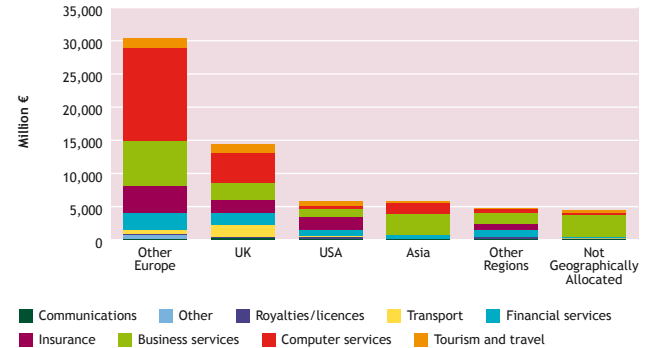
## 4.1 Ireland's Services Exports, 2002-2008



Source: CSO, "Balance of International Payments", various editions.

	Million €								% of total 2008 services exports	% change from 2002 to 2008
	2002	2003	2004	2005	2006	2007	2008			
Communications	1,040	622	343	432	432	516	525	0.7	-49.5	
Other	607	619	739	581	661	710	362	0.5	-40.3	
Royalties/licences	298	186	282	623	737	865	911	1.3	+205.7	
Transport	1,710	1,708	1,895	2,131	2,334	2,908	3,010	4.3	+76.0	
Tourism and travel	3,256	3,409	3,536	3,863	4,258	4,426	4,279	6.2	+31.4	
Financial services	2,909	3,365	4,267	4,850	6,214	7,440	6,850	9.9	+134.4	
Insurance	5,217	7,691	7,821	6,909	8,738	8,799	8,582	12.4	+64.5	
Business services	5,496	6,957	8,439	13,072	15,399	20,571	21,400	30.9	+289.3	
Computer services	11,056	12,575	15,100	15,755	18,298	21,726	23,284	33.6	+110.6	
<b>Total</b>	<b>31,589</b>	<b>37,133</b>	<b>42,424</b>	<b>48,219</b>	<b>57,069</b>	<b>67,961</b>	<b>69,203</b>	<b>100</b>	<b>+125.4</b>	

## 4.2 Composition and Geographical Distribution of Ireland's Services Exports, 2007



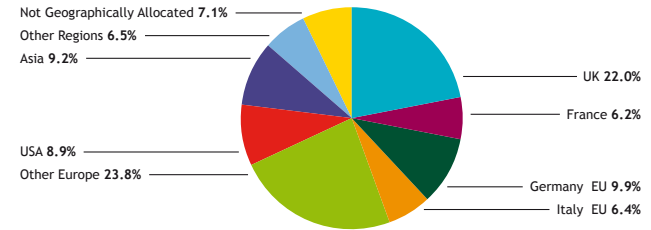
Source: CSO, "Services Exports and Imports 2006 and 2007".



	Other Europe	United Kingdom	USA	Asia	Other Regions <sup>16</sup>	Not Geographically Allocated	Total
<b>Total, €m</b>	<b>30,401</b>	<b>14,466</b>	<b>5,841</b>	<b>6,024</b>	<b>4,270</b>	<b>4,648</b>	<b>65,650</b>
<b>% of total Services Exports</b>	<b>46.3</b>	<b>22.0</b>	<b>8.9</b>	<b>9.2</b>	<b>6.5</b>	<b>7.1</b>	<b>100.0</b>
<b>% Change in value between 2005 and 2007</b>	<b>+33.6</b>	<b>+15.3</b>	<b>+41.3</b>	<b>+50.1</b>	<b>-30.6</b>	<b>+302.1</b>	<b>+36.1</b>
	Million €						
Communications	108	220	21	4	7	125	485
Other	504	20	76	28	82	*	710
Royalties/Licences	235	162	219	*	244	*	860
Transport	532	1,776	169	4	6	79	2,566
Financial Services	2,689	1,892	964	612	1,082	174	7,413
Insurance	3,922	1,937	1,901	*	905	42	8,707
Business Services	6,821	2,560	1,306	3,309	1,641	3,267	18,904
Computer Services	14,024	4,412	391	1,643	727	381	21,578
Tourism & Travel	1,571	1,482	793	170	61	349	4,426

Note: \* indicates that the data is unavailable and is not included in the total figure.

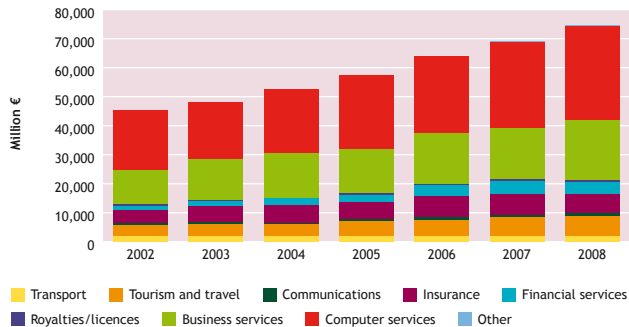
### 4.3 Geographical Distribution of Ireland's Services Exports, 2007



Source: CSO, "Services Exports and Imports 2006 and 2007".

Million €	2007	% of total	% change from 2006 and 2007
UK	14,466	22.0	+12.5
France	4,052	6.2	+35.9
Germany	6,507	9.9	+12.3
Italy	4,202	6.4	+9.5
Other Europe <sup>17</sup>	15,640	23.8	+27.5
USA	5,841	8.9	-29.7
Asia	6,024	9.2	+48.8
Other Regions	4,270	6.5	+12.2
Not Geographically Allocated	4,648	7.1	-1.1
<b>Total</b>	<b>65,650</b>	<b>100</b>	<b>+19.3</b>

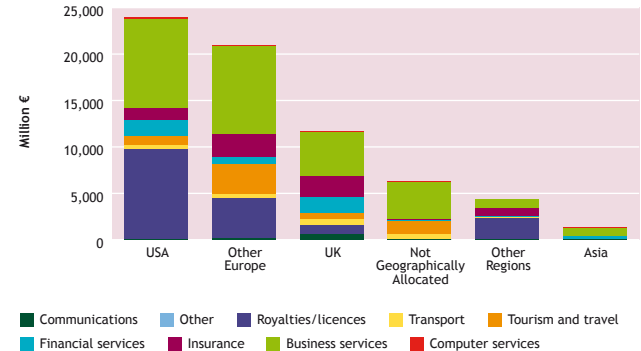
#### 4.4 Ireland's Services Imports, 2002-2008



Source: CSO, "Balance of Payments", various editions.

Million €	2002	2003	2004	2005	2006	2007	2008	% change from 2004 to 2008
Transport	1,908	1,725	1,790	1,982	2,027	2,067	1,867	+4.3
Tourism and travel	3,942	4,188	4,184	4,898	5,446	6,300	7,055	+68.6
Communications	634	757	622	709	772	819	865	+39.1
Insurance	4,187	5,547	6,039	5,976	7,239	7,133	6,517	+7.9
Financial services	1,707	1,806	2,235	2,654	3,906	4,635	4,298	+92.3
Computer services	589	329	307	352	562	660	686	+123.4
Royalties/licences	11,697	14,208	15,169	15,482	17,534	17,469	20,598	+35.8
Business services	20,517	19,472	22,146	25,313	26,203	29,826	32,524	+46.8
Other	187	190	136	158	176	174	166	+22.0
<b>Total</b>	<b>45,370</b>	<b>48,223</b>	<b>52,625</b>	<b>57,521</b>	<b>63,867</b>	<b>69,083</b>	<b>74,576</b>	<b>+41.7</b>

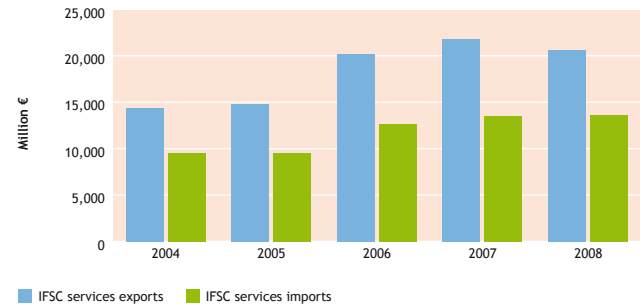
#### 4.5 Composition and Geographical Distribution of Ireland's Services Imports, 2007



Source: CSO, "Services Exports and Imports 2006 and 2007". \* indicates that the data is unavailable and is not included in the total figure.

Million €	USA	Other Europe	United Kingdom	Not Geographically Allocated	Other Regions	Asia	Total
<b>Total, €m</b>	<b>23,961</b>	<b>20,923</b>	<b>11,733</b>	<b>6,528</b>	<b>3,994</b>	<b>1,380</b>	<b>68,519</b>
% of total Services Imports	35.0	30.5	17.1	9.5	5.8	2.0	100.0
% Change in value between 2005 and 2007	+20.5	+2.6	+34.6	+131.9	-4.9	-9.0	+19.1
Million €							
Communications	22	167	553	71	13	7	833
Other	35	25	72	*	37	5	174
Royalties/Licences	9,721	4,239	961	*	2,333	*	17,254
Transport	336	466	608	563	17	58	2,048
Tourism and Travel	1,054	3,238	723	1,313	44	17	6,389
Financial Services	1,701	779	1,657	153	84	311	4,685
Insurance	1,322	2,455	2,274	104	901	*	7,056
Business Services	9,574	9,424	4,698	4,014	901	881	29,492
Computer Services	197	128	187	40	16	20	588

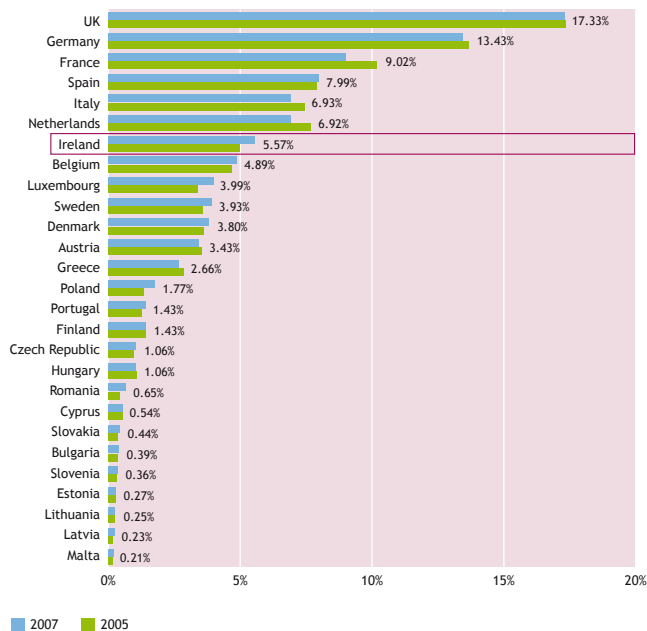
## 4.6 IFSC<sup>18</sup> Services Exports and Imports, 2004-2008



Source: CSO, "Balance of International Payments", various editions.

Million €	2004	2005	2006	2007	2008	% change from 2007 to 2008
IFSC services exports	14,356	14,780	20,163	21,813	20,669	-0.05
IFSC services imports	9,563	9,570	12,649	13,553	13,657	+0.70

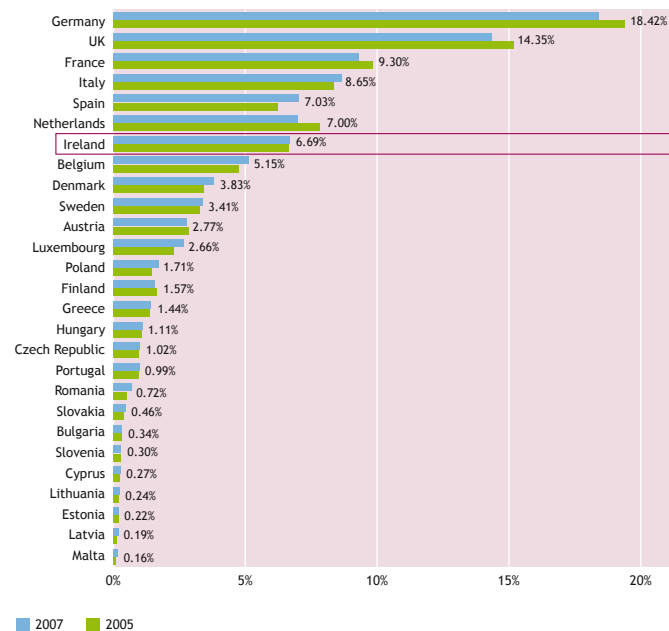
## 4.7 Share of Total Extra and Intra EU27 Services Exports, 2005 and 2007



Note: 2007 values are specified in chart.

Source: Eurostat.

## 4.8 Share of Total Extra and Intra EU27 Services Imports, 2005 and 2007



Note: 2007 values are specified in chart.

Source: Eurostat.

## 4.9 Ireland's Ranking, USA Services Imports and Exports, 2006-2007

Ranking	2006	2007
Services Imports to USA	8th	8th
Services Exports from USA	5th	5th

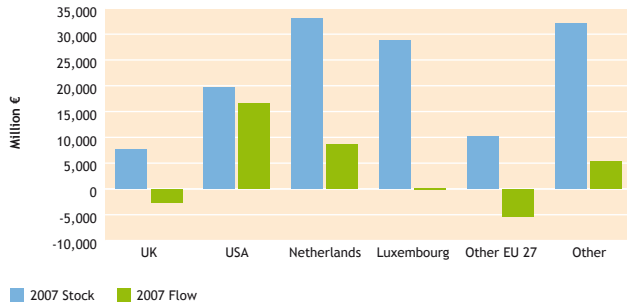
Source: US Bureau of Economic Analysis.

## Section 5

### Investment Position

- 5.1 Direct Foreign Investment Stock and Flow in Ireland by location of investor, 2006 and 2007
- 5.2 Direct Foreign Investment Stock by Activity of Resident Enterprise, 2007
- 5.3 Cumulative Stock of Inward FDI as a percentage of GDP, selected countries, 2006-2007
- 5.4 Ireland's Outward Foreign Direct Investment Flows, current prices, 2000-2008
- 5.5 Outward Direct Investment Stock by Destination of Investment, 2007
- 5.6 Cumulative Stock of Outward Direct Investment as a percentage of GDP, selected countries, 2006-2007
- 5.7 Destination of US FDI, 2007

## 5.1 Direct Foreign Investment<sup>19</sup> Stock<sup>20</sup> and Flow in Ireland by location of investor, 2006 and 2007

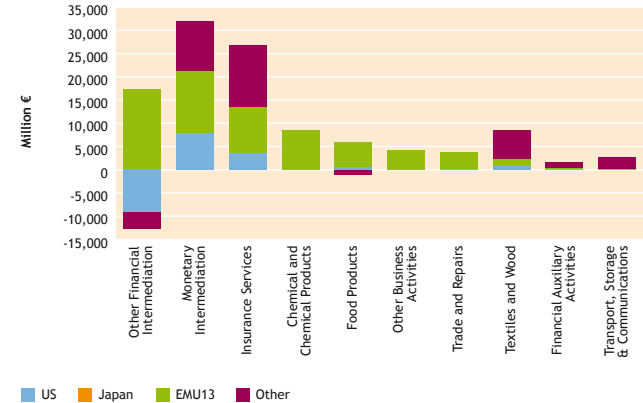


Source: CSO, "Foreign Direct Investment 2007".

Note: Some foreign multinational companies may use operations based in a third country to invest in Ireland, resulting in investment from that third country being under or over-valued. For example, the Bureau of Economic Analysis in the USA reports that FDI to Ireland in 2007 was US\$87,023m, whereas the CSO data in the table below indicates that US FDI to Ireland was €19,759m.

Million €	2006 Stock	2006 Flow	2007 Stock	2007 Flow	Stock % change 2006 and 2007
UK	11,652	-2,550	7,614	-2,562	-34.7
USA	5,835	-667	19,759	+16,505	+238.6
Netherlands	28,509	-2,634	33,009	+8,673	+15.8
Luxembourg	35,266	+3,769	28,863	-217	-18.2
Other EU 27	17,371	+1,157	10,139	-5,393	-41.6
Other	20,191	-3,493	32,027	+5,345	+58.6
<b>Total</b>	<b>118,824</b>	<b>-4,418</b>	<b>131,411</b>	<b>+22,351</b>	<b>+10.6</b>

## 5.2 Direct Foreign Investment Stock by Activity of Resident Enterprise, 2007

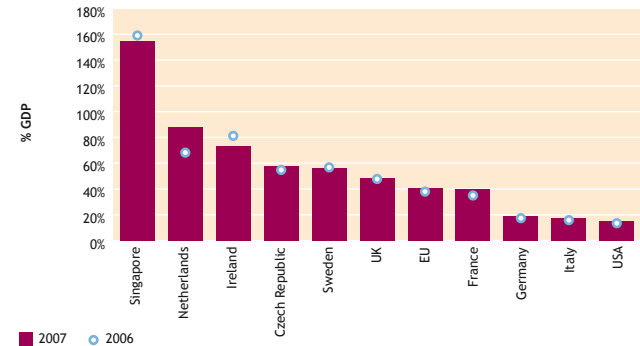


Source: CSO, "Foreign Direct Investment 2007".

Note: \* indicates that data is suppressed for confidentiality reasons.

Million €	US	Japan	EMU13	Other	Total
<b>Manufacturing Sector:</b>	<b>13,892</b>	<b>-273</b>	<b>21,847</b>	<b>9,009</b>	<b>44,475</b>
Food Products	528	*	5,285	-1,172	<b>4,641</b>
Textiles and Wood	769	*	1,375	6,402	<b>8,546</b>
Chemical and Chemical Products	*	*	8,401	*	*
Metal and Mechanical Products	-62	*	*	-695	<b>-633</b>
Other Manufacturing	*	-39	*	*	*
<b>Electricity, Gas and Water</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Services Sector:</b>	<b>5,867</b>	<b>1,349</b>	<b>48,869</b>	<b>30,254</b>	<b>86,339</b>
Trade and Repairs	104	0	3,677	*	*
Transport, Storage & Communications	*	0	127	2,598	<b>2,725</b>
Monetary Intermediation	7,765	*	13,387	10,926	<b>32,078</b>
Other Financial Intermediation	-9,055	*	17,368	-3,699	<b>4,614</b>
Insurance Services	3,501	*	9,929	13,368	<b>26,798</b>
Financial Auxiliary Activities	108	*	262	1,174	<b>1,544</b>
Other Business Activities	*	*	4,131	*	*
Other Service Activities	*	24	-12	*	*

### 5.3 Cumulative Stock of Inward FDI as a percentage of GDP, selected countries, 2006-2007

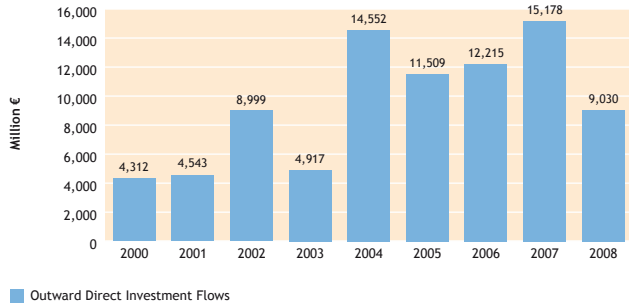


Source: UNCTAD, "World Investment Report 2008".

% GDP	2000	2006	2007	% change 2000 and 2007
Singapore	121.5	159	154.7	+27.3
Netherlands	63.3	68.2	87.9	+38.9
Ireland	131.9	81.2	73.6	-44.2
Czech Republic	38.2	54.8	57.7	+51.0
Sweden	38.3	56.8	56.0	+46.2
UK	30.4	47.8	48.5	+59.5
European Union	25.9	38.0	40.9	+57.9
France	19.6	35.0	40.1	+104.6
Germany	14.3	17.4	19.0	+32.9
Italy	11	15.9	17.3	+57.3
USA	12.8	13.5	15.1	+18.0

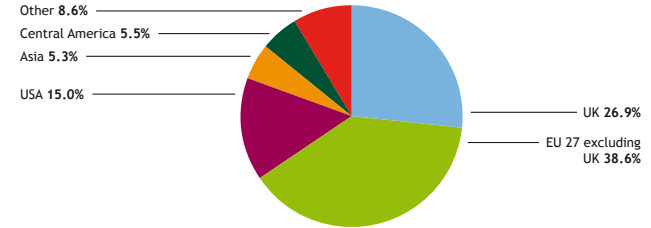


## 5.4 Ireland's Outward Foreign Direct Investment Flows, current prices, 2000-2008



Source: CSO, "Balance of International Payments", various editions.

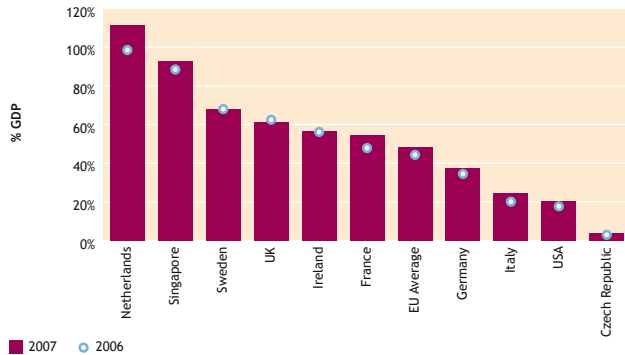
## 5.5 Outward Direct Investment<sup>21</sup> Stock by Destination of Investment, 2007



Source: CSO, "Foreign Direct Investment 2007".

% of total	2006	2007	Value 2007 (Million €)	% change from 2006 to 2007
UK	25.9	26.9	26,678	+3.9
EU 27 excluding UK	41.0	38.6	38,267	-5.8
USA	12.3	15.0	14,909	+22.8
Asia	*	5.3	5,228	*
Central America	6.4	5.5	5,448	-14.2
Other	14.4	8.6	8,554	-3.5
	100.0	100.0	99,084	+5.8

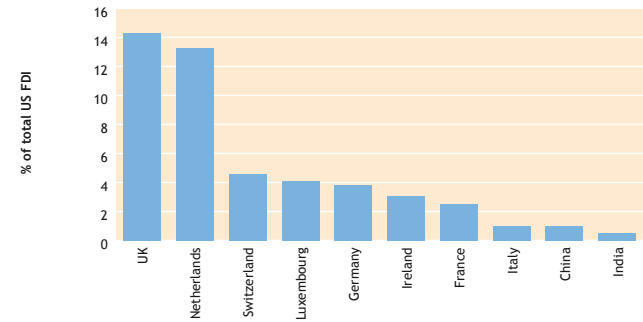
## 5.6 Cumulative Stock of Outward Direct Investment as a percentage of GDP, selected countries, 2006-2007



Source: UNCTAD, "World Investment Report 2008".

% of GDP	2000	2006	2007	% change 2000 and 2007
Netherlands	79.3	98.5	111.2	+40.2
Singapore	61.2	89.0	92.7	+51.5
Sweden	50.2	68.4	67.8	+35.1
UK	62.3	62.6	61.5	-1.3
Ireland	29.0	56.7	56.7	+95.5
France	33.5	48.3	54.7	+63.3
EU Average	36.1	44.9	48.1	+33.2
Germany	28.5	34.7	37.3	+30.9
Italy	16.4	20.3	24.7	+50.6
USA	13.4	18.0	20.2	+50.7
Czech Republic	1.3	3.6	4.0	+20.8

## 5.7 Destination of US FDI, 2007



Source: US Bureau of Economic Analysis.

Million \$	2005	2006	2007	% of total US FDI
All Countries	2,241,656	2,454,674	2,791,269	100
Europe	1,210,679	1,341,116	1,551,165	55.6
UK	351,513	375,348	398,836	14.3
Netherlands	240,205	280,514	370,160	13.3
Switzerland	100,692	115,216	127,709	4.6
Luxembourg	79,937	94,554	113,611	4.1
Germany	100,473	96,243	107,351	3.8
Ireland	55,173	71,065	87,023	3.1
France	60,526	62,003	68,454	2.5
Italy	24,528	26,342	28,408	1.0
China	19,016	23,405	28,298	1.0
India	7,162	9,226	13,633	0.5

Ranking as destination for USA FDI	2007
Ireland ranking in Europe	6th
Ireland ranking in World	11th

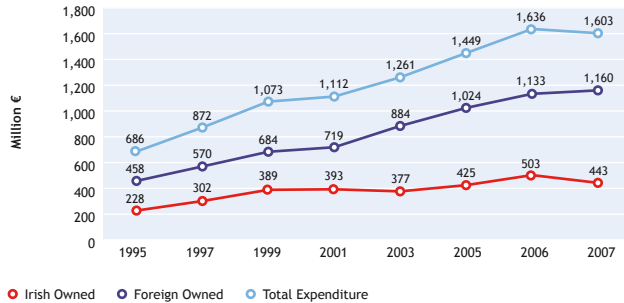
*Source: US Bureau of Economic Analysis.*

## Section 6

### R&D, Innovation and Intellectual Property

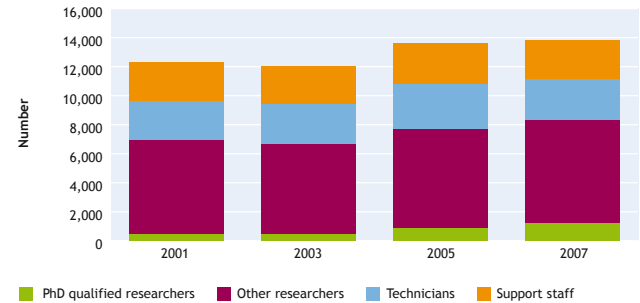
- 6.1 Business Sector R&D Expenditure, constant prices, 1995-2007
- 6.2 Headcount of Research Personnel by type of Activity, 2001-2007
- 6.3 Innovation Activity rates by Sector, Nationality of Ownership and Numbers of Persons Engaged, 2004-2006
- 6.4 Triadic Patent Families per million Inhabitants, 2006

## 6.1 Business Sector R&D Expenditure, constant prices<sup>22</sup>, 1995-2007



Source: CSO and Forfás, "Business Expenditure on Research and Development, 2007/2008".

## 6.2 Headcount of research personnel by type of activity, 2001-2007



Source: CSO and Forfás, "Business Expenditure on Research and Development, 2007/2008".

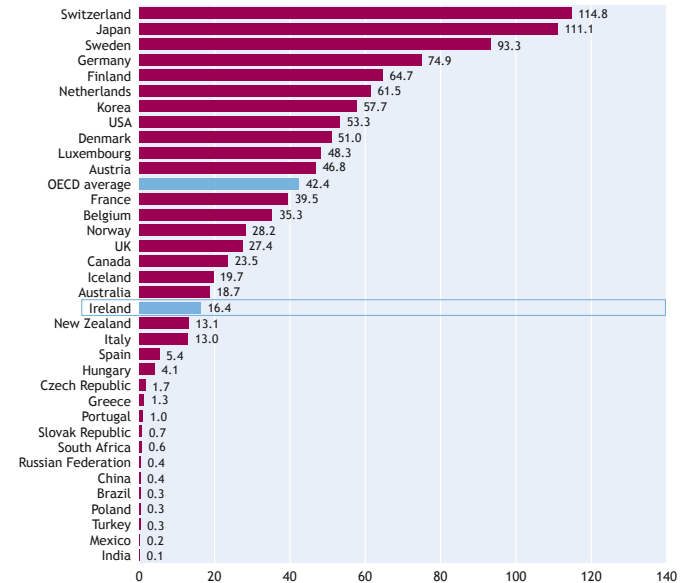
Number	2001	2003	2005	2007
Researchers	6,937	6,611	7,696	8,304
of which:				
PhD qualified researchers	420	466	830	1,191
Other researchers	6,517	6,145	6,866	7,113
Technicians	2,642	2,799	3,095	2,804
Support staff	2,741	2,627	2,830	2,753
<b>Total research personnel</b>	<b>12,320</b>	<b>12,037</b>	<b>13,621</b>	<b>13,861</b>

### 6.3 Innovation Activity rates by sector, nationality of ownership and numbers of persons engaged, 2004-2006

	Number employees	% of enterprises with innovation activities	% of turnover generated by enterprises with innovation activities	% of persons engaged in enterprises with innovation activities
<b>Industrial sectors</b>				
<i>Irish</i>	10-49	49.0	47.9	54.4
	50-249	62.8	63.1	65.9
	250+	76.9	91.0	85.8
	All	52.1	70.7	67.1
<i>Foreign</i>	10-49	65.6	25.5	69.3
	50-249	74.7	83.6	75.9
	250+	87.6	97.6	93.1
	All	72.6	91.4	87.0
<b>Selected services sectors</b>				
<i>Irish</i>	10-49	35.5	26.7	37.0
	50-249	53.1	55.9	56.9
	250+	63.3	77.9	77.0
	All	37.7	55.0	60.0
<i>Foreign</i>	10-49	54.8	57.4	55.6
	50-249	64.8	82.9	64.8
	250+	61.4	73.8	61.5
	All	58.2	73.1	61.6
<b>All enterprises (10+ persons engaged), %</b>		47.2	75.1	68.0

Source: CSO and Forfás, "Community Innovation Survey, 2004-2006".

### 6.4 Triadic Patent Families<sup>23</sup> per million inhabitants, 2006



Source: OECD Statistics Portal.

# Footnotes

- 1 The EU-Harmonised Index of Consumer Prices is calculated in each Member State of the European Union. Some items from the Irish CPI are excluded from the HICP estimate for Ireland.
- 2 "250 and over" includes a figure for "Non attributable" for Net Output per person engaged.
- 3 Value Added is defined as total sales minus all purchases of raw materials and services.
- 4 Agency assisted companies are companies within the client base of Enterprise Ireland, IDA Ireland, Shannon Development and Údarás na Gaeltachta.
- 5 Constant prices use price indices to adjust for inflation. Indices used to calculate constant prices were: CSO Manufacturing Output Price Index (using 2000 prices) for manufacturing value-added, and CSO Consumer Price Index (using 2001 prices) for internationally traded services value-added.
- 6 N.e.c. indicates that data is not elsewhere classified.
- 7 Economy expenditure is defined as expenditure in the Irish economy on payroll costs, Irish-produced raw materials and Irish services.
- 8 Indices used to calculate constant prices were: CSO Manufacturing Output Price Index (using 2000 prices) for manufacturing direct expenditure, and CSO Consumer Price Index (using 2001 prices) for internationally traded services direct expenditure.
- 9 Using export price index, 1990 prices.
- 10 Q1 represents quarter 1 of a particular year, that is, January, February and March.
- 11 Using export price index, 1990 prices.
- 12 SITC is the Standard International Trade Classification. It is used to classify the exports and imports of goods of a country and it enables the direct comparison between countries and years.
- 13 Nes indicates that data is not elsewhere specified.
- 14 Emerging economies are defined as: Brazil, China (including Hong Kong and Macau), India, Russia, South Africa.
- 15 Using import price index, 1990 prices.
- 16 Of this, €1,886 million is exported to Central America. Other regions also include Asia for Insurance, Not Geographically Allocated and Asia for Royalties/Licences and include Not Geographically Allocated for Other.
- 17 No other country in Europe has an export value of greater than the lowest value in this table. In addition, data availability is limited on the destination of Ireland's services exports.
- 18 From the start of 2000 new international financial service projects are no longer subject to the earlier certification and licensing procedures in operation for location in the IFSC and such projects can, therefore, locate anywhere in Ireland. Additions to existing IFSC projects, however, are still subject to the formal procedures (CSO Balance of Payments). The activities of all international financial service enterprises are covered under the IFSC heading. The IFSC includes a range of internationally traded financial services, including banking, asset financing, fund management, corporate treasury management, investment management, custody and administration and specialised insurance operations
- 19 Direct investment in Ireland covers the net investment by foreign companies in their affiliates located in Ireland.
- 20 Direct investment stock represents the balance sheet position of direct investment into Ireland.
- 21 Outward direct investment covers net investment by parent companies resident in Ireland in their foreign branches, subsidiaries and associated companies.
- 22 Using CSO CPI, 2007 prices.
- 23 Triadic patents are a series of corresponding patents filed at the European Patent Office (EPO), the United States Patent and Trademark Office (USPTO) and the Japan Patent Office (JPO), for the same invention, by the same applicant or inventor.





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