



Rialtas na hÉireann
Government of Ireland

Annual Business Survey of Economic Impact (ABSEI) 2017

Prepared by the Department of Business, Enterprise and Innovation

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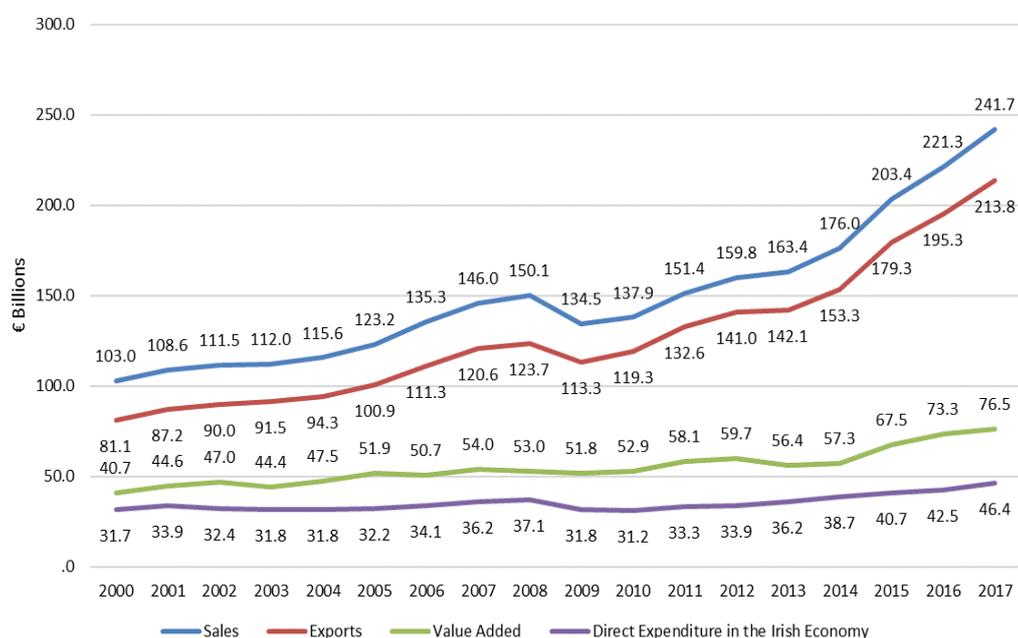
1 Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2008 = €161.1bn / 2017 = €233.2bn. Source: CSO, StatBank: T05 Expenditure on Gross National Income at Current Market Prices: 88. Gross national product at current market prices.

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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 Ireland² 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), 2000-2017



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 2017.

Agency client companies reported a rise in sales and exports in 2017 over the previous year. This continues a substantial upward trend in results following the downturn in the economy in 2009.

- Total sales amounted to €241.7 billion in 2017 which represents an increase of 9.2% in current prices on the previous year’s figure of €221.3 billion.
- Total exports in 2017 amounted to €213.8 billion, an increase of 9.5% on the previous year of €195.3 billion.

² The population of the ABSEI survey also includes a small number of High-Potential Start-Up (HPSU) companies with employment of less than 10 where there is an expectation that their employment will exceed 10 in the following survey.

- Value added (sales less materials and services costs) has also increased over this time-series and in 2017 amounted to €76.5 billion, up 4.4% on the previous year.
- Direct Expenditure in the Irish Economy (Payroll, Irish Materials, Irish Services) has increased over 2016 by 9.2% to €46.4 billion in 2017.

E.2 Summary Table of Key Business Indicators (current prices), 2017

	2017 (€bn)			Share of Total 2017	
	Foreign-owned	Irish-owned	All	Foreign-owned	Irish-owned
Sales	200.3	41.5	241.7	83%	17%
Exports	192.5	21.3	213.8	90%	10%
Value Added	61.9	14.5	76.5	81%	19%
Direct Expenditure	21.3	25.1	46.4	46%	54%

Note: Rounding may affect totals

This table shows sales, exports, value added and direct expenditure for 2017 by ownership.

- Total sales for agency-assisted companies in 2017 amounted to €241.7 billion.
 - Foreign-owned companies account for €200.3 billion, an increase of 9.3% over the previous year. This represents 82.8% of total sales by Agency clients in 2017.
 - Sales for Irish-owned firms increased by 8.8% between 2016 and 2017, amounting to €41.5 billion or 17.2% of total sales.
- Total exports for agency clients amounted to €213.8 billion in 2017, a 9.5% increase over 2016 exports, with €192.5 billion exports by Foreign-owned companies and €21.3 billion exports by Irish-owned companies in 2017.
- Value added was €76.5 billion in 2017 with 80.9% of this value being generated in foreign owned firms.
- Irish owned client companies have €25.1 billion of direct expenditure in the Irish economy compared with €21.3 billion for foreign owned companies.

E.3 Export Intensity of Irish and Foreign-owned Companies, 2000-2017

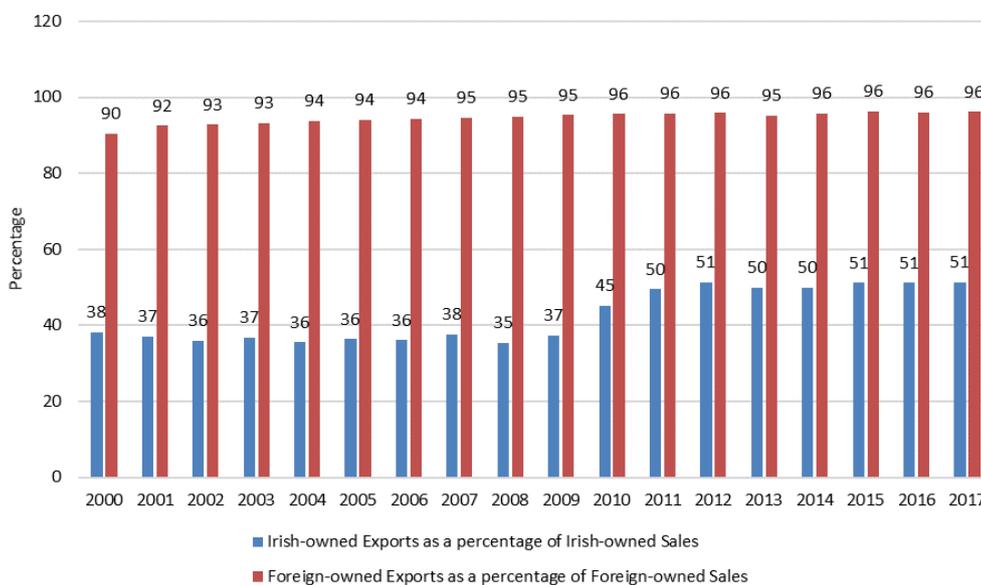
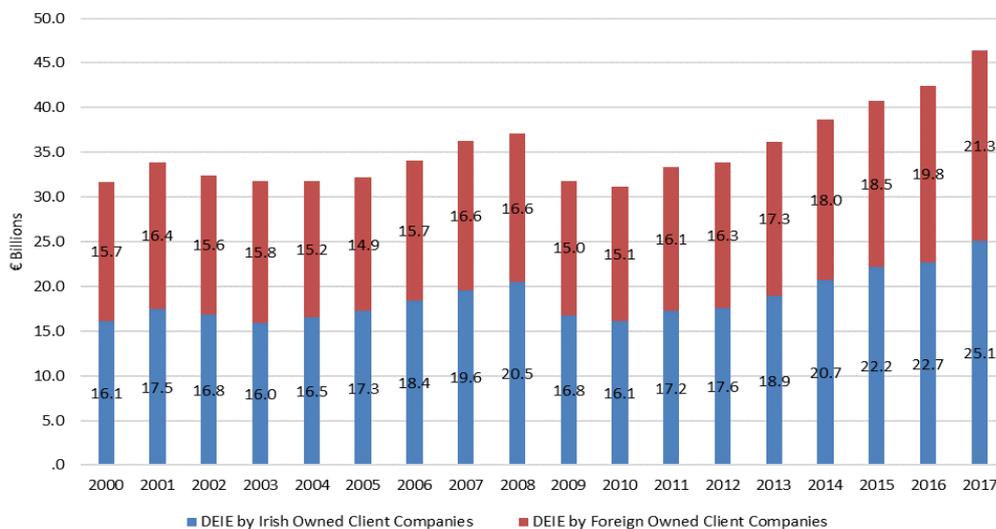


Figure E.3 above illustrates the export intensity (exports as a percentage of total sales) of Irish-owned and Foreign-owned firms over the period 2000 to 2017.

- Irish-owned firms have increased their export intensity from 38% in 2000 to a steady 50-51% intensity since 2011.
- The vast majority of products and services produced by foreign-owned firms are destined for export, with an export intensity of 96% in 2017, at this constant level since 2010.

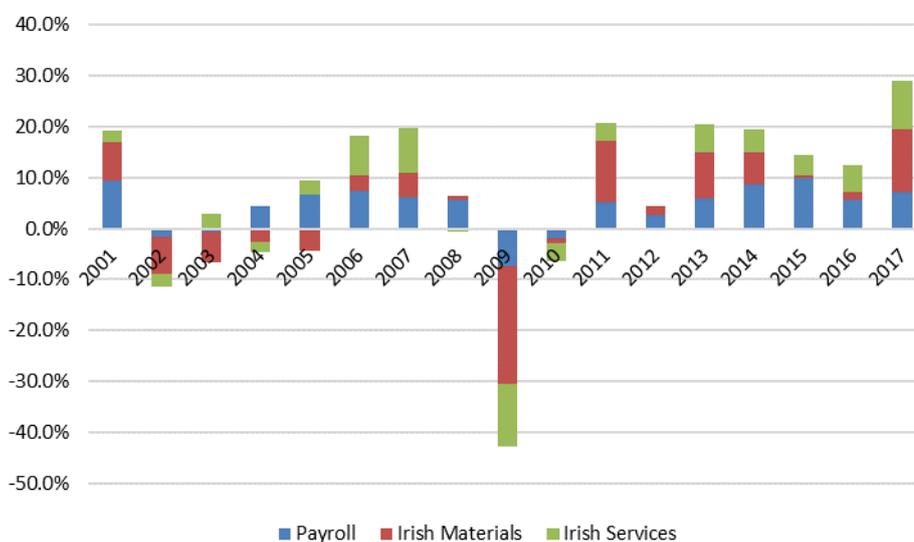
E.4 Direct Expenditure in the Irish Economy (DEIE) by Ownership, 2000-2017



In 2017, Direct Expenditure in the Irish Economy (DEIE) by agency-assisted firms amounted to €46.4 billion and is the highest level of direct expenditure in the eighteen years of this time-series.

Irish-owned client companies spent approximately €25.1 billion in the Irish economy in terms of payroll and purchases of Irish materials and Irish services. Foreign owned clients spent €21.3 billion. Direct Expenditure has been increasing each year since 2010.

E.5 All firms, year-on-year percentage change, Payroll, Irish Materials and Irish Services, 2000-2017



In 2017, there was an increase in payroll and purchases of Irish materials and services over the 2016 figures. There was an increase in the purchases of Irish materials of 12.1% and Irish services of 9.6% and of payroll payments of 7.3%.

E.6 Direct Expenditure as Percentage of GNP³ in Irish/foreign-owned companies, 2000, 2008 and 2017

	Irish			Foreign		
	2000	2008	2017	2000	2008	2017
All Sectors	17.3%	12.7%	10.8%	16.8%	10.3%	9.1%
Manufacturing & Other Industry	15.3%	10.8%	8.7%	12.0%	7.1%	4.9%
Infor., Comm. & Other Services	2.0%	1.9%	2.1%	4.8%	3.2%	4.2%

- In 2017, the Direct Expenditure (payroll and purchases of Irish materials & services) of Irish-owned firms in the Irish economy amounted to 10.8% of Ireland’s Gross National Product (GNP). In 2000, this figure was 17.3% and 12.7% in 2008.
 - Direct Expenditure of the Irish-owned Manufacturing sectors as a percentage of GNP reduced from 15.3% to 10.8% between 2000 and 2008 and decreased further in 2017 to 8.7%. The Services sectors have increased their share from 2.0% in 2000 to 2.1% in 2017.
- Direct Expenditure by foreign-owned firms as a percentage of GNP stands at 9.1% in 2017 down from 16.8% in 2000.
 - Direct Expenditure as a percentage of GNP in the foreign-owned Information, Communication & Internationally-Traded Services sectors decreased from 4.8% in 2000 to 4.2% in 2017. The manufacturing sectors have also decreased their share from 12.0% in 2000 to 4.9% in 2017.

E.7 Value Added as percentage of GNP in Irish/foreign-owned companies, 2000, 2008 and 2017

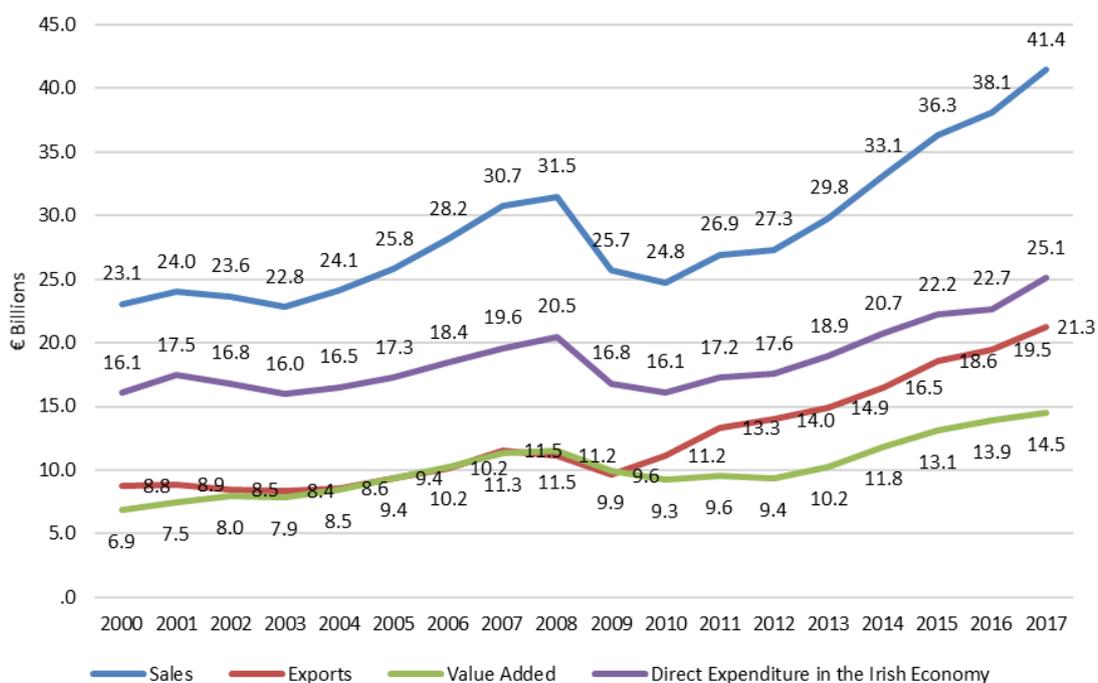
	Irish			Foreign		
	2000	2008	2017	2000	2008	2017
All	7.4%	7.2%	6.2%	36.4%	25.8%	26.6%
Manufacturing & Other Industry	5.2%	4.7%	3.6%	25.9%	17.3%	15.0%
Infor., Comm. & Other Services	2.1%	2.4%	2.7%	10.5%	8.4%	11.6%

- Value added (sales less the cost of materials and services) in Irish owned companies has dropped as a percentage of GNP in 2017 to 6.2% from 7.4% in 2000.

³ Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2008 = €161.1bn / 2017 = €233.2bn. Source: CSO, StatBank: T05 Expenditure on Gross National Income at Current Market Prices: 88. Gross national product at current market prices.

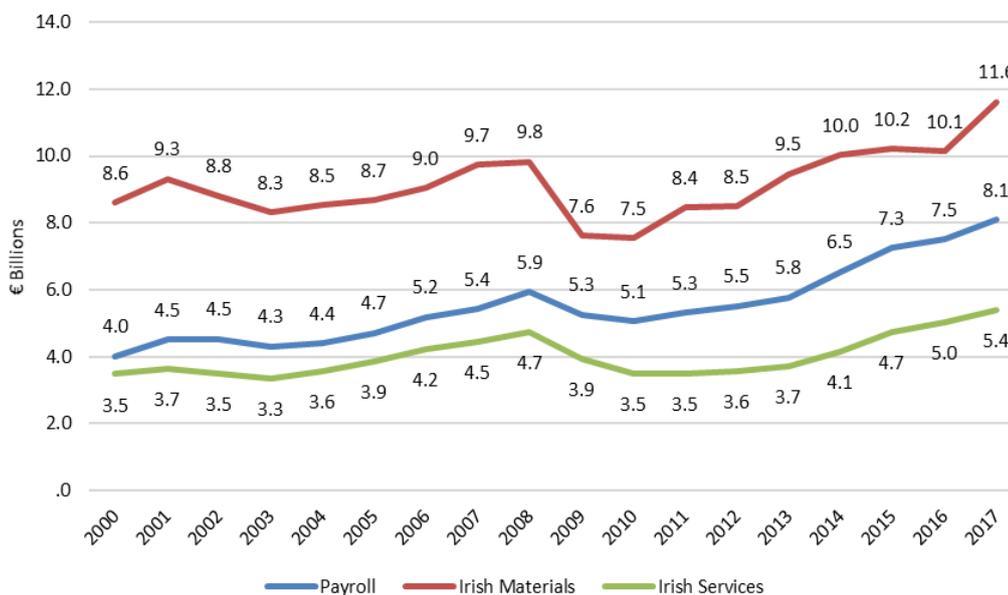
- While the manufacturing sectors have seen value added decrease between 2000 and 2017 from 5.2% to 3.6%, the services sectors have increased their percentage share of GNP from 2.1% in 2000 to 2.7% in 2017.
- For foreign-owned companies, value added as a percentage of GNP decreased from 36.4% in 2000 to 25.8% in 2008 and increased to 26.6% in 2017.
 - The Services sectors have increased value added from their 2000 level of 10.5% of GNP to 11.6% of GNP in 2017.
 - The Manufacturing sectors have decreased value added as a percentage of GNP from 25.9% in 2000 to 15.0% in 2017.

E.8 Key Business Indicators for Irish-Owned Companies, 2000-2017 (current prices)



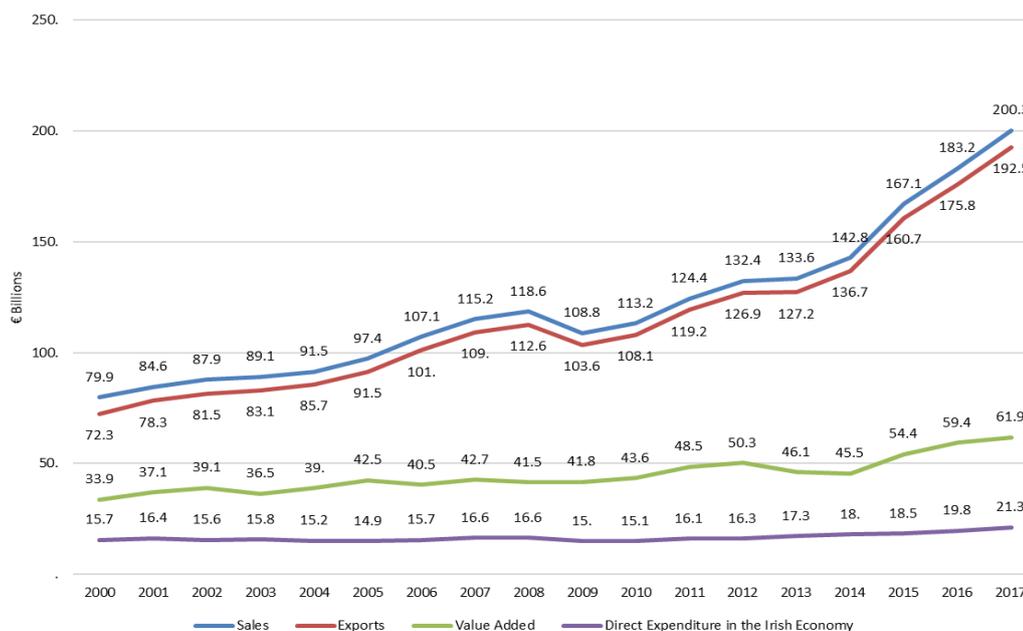
- Sales by Irish owned firms in 2017 showed an increase of 8.8% on the previous year. Total sales stood at €41.4 billion in 2017.
- Exports were also significantly up for Irish firms in 2017 over 2016 with growth of 9.3% and amounted to €21.3 billion in 2017.
- Value-added and direct expenditure have also continued their upward trend with direct expenditure reaching €25.1 billion (up 10.6%) and value added €14.5 billion (up 4.3%) in 2017.

E.9 Direct Expenditure in the Irish Economy for Irish-owned clients companies, 2000-2017



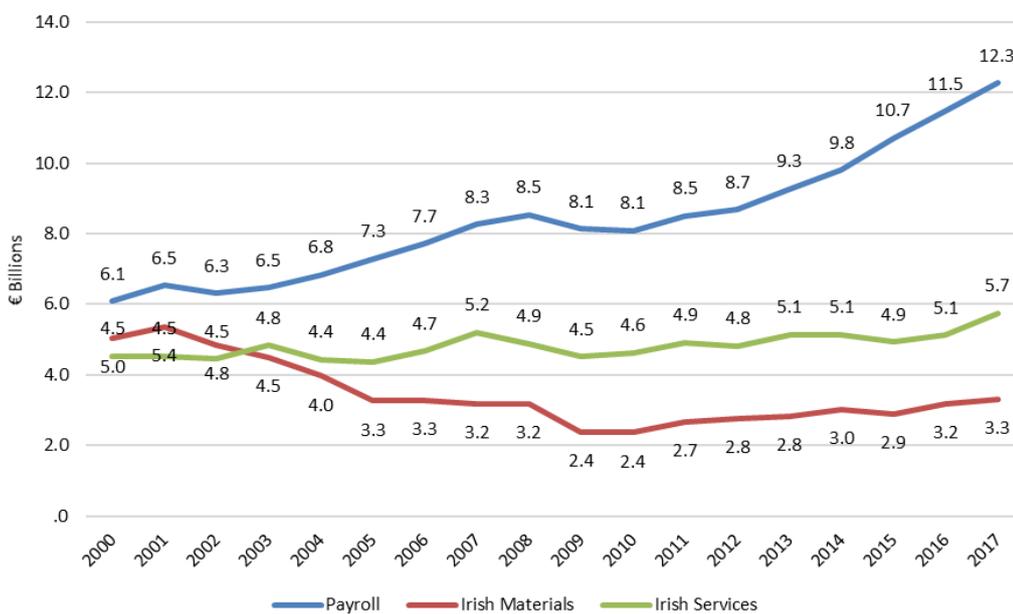
- Irish-owned firms spent €25.1 billion in 2017 in the Irish economy with the largest proportion of this expenditure being on Irish materials. The breakdown of expenditure in 2017 was €8.1 billion on payroll, €11.6 billion on Irish raw materials and €5.4 billion on Irish services.

E.10 Key Business Indicators for Foreign-Owned Companies, 2000-2017 (current prices)



- Sales by foreign-owned companies have increased by 9.3% and exports by 9.5% in 2017 over 2016 to €200.3 billion and €192.5 billion respectively. On a per annum basis between 2000 and 2017, sales increased by 5.6% and exports by 5.9%.
- Value added increased by 4.3% between 2016 and 2017 to €61.9 billion.
- Direct expenditure reached €21.3 billion in 2017, a 7.7% increase over the previous year.

E.11 Direct Expenditure in the Irish Economy by Foreign-owned companies, 2000-2017



- Foreign firms spend less on Irish materials and more on payroll and services than Irish firms. In 2017, direct expenditure by foreign firms amounted to €21.3 billion, comprising €12.3 billion on payroll, €3.3 billion on materials and €5.7 billion on services purchased in Ireland.

Chapter 1: Introduction

1.1 Background

This report presents the findings of the Annual Business Survey of Economic Impact for 2017.

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

The report provides aggregated estimates for all Irish-owned and foreign-owned client firms across a range of variables and provides an overview of the evolution of manufacturing and services sectors for the past eighteen years (2000-2017 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.
- 4,268 client companies in total were surveyed. To allow for non-responses, aggregated results are developed by sector using a combined weighting and imputation system⁴.
- Fieldwork was carried out throughout 2017/2018.
- All figures in this report are in nominal values (current prices).
- Compound Annual Growth Rate (CAGR). Throughout this report the percentage change between 2000-2008 and 2000-2017 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.

⁴ 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, 2000-2017

Aggregated data from the Annual Business Survey is available for the period 2000-2017. These results are available in excel format on the Department of Business, Enterprise and Innovation (DBEI) website. To access these excel files please go to publications section on the DBEI web-site at:

The files contain the following indicators:

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

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

Results are broken down by⁵:

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

All monetary amounts are provided in current prices.

1.4 Management and Use of Data

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

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

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

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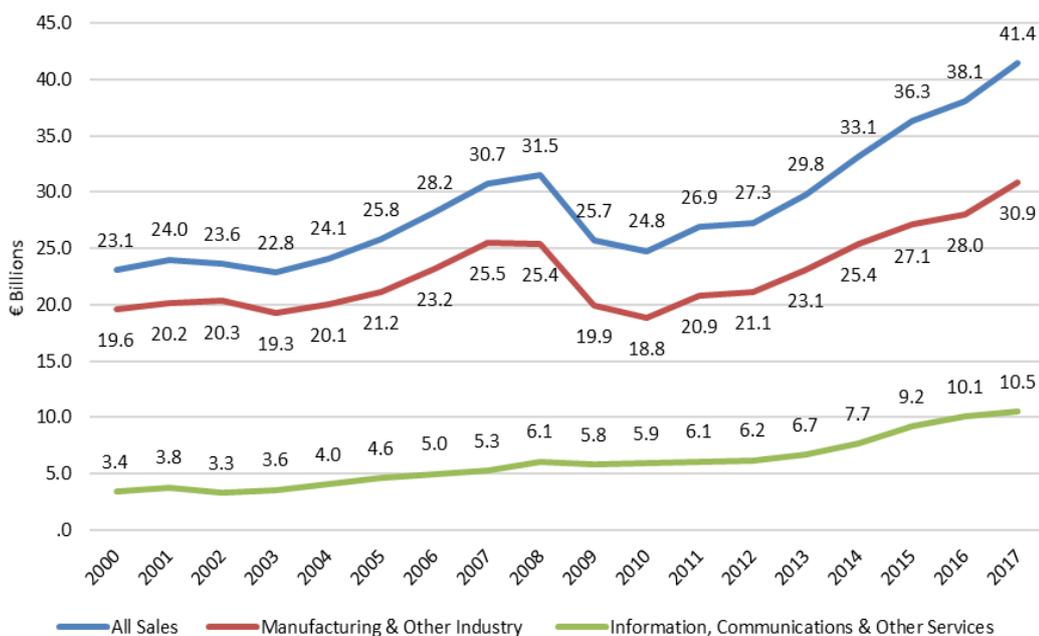
⁵ A regional split is also available in the CSV files published with the report.

Acknowledgement

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

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

2.1 Sales - Irish-owned Client Companies, 2000-2017



This graph shows the total level of sales achieved by Irish-owned companies during the eighteen 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 top 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 2017, stood at €41.4 billion for all manufacturing and services companies and is the highest level of sales recorded over the course of this survey. This represents an 8.7% increase over the 2016 figure of €38.1 billion at current prices.
- In the manufacturing sector, sales reached a high point of €25.5 billion in 2007 but then dropped to €18.8 billion in 2010. Sales in manufacturing companies have recovered in each of the past six years and in 2017 sales amounted to €30.9 billion at current prices, their highest ever level.
- Sales in the services sectors have been increasing steadily over the last eighteen years and amounted to €10.5 billion in 2017. These sales represent a per annum increase of 6.9% over the 2000 sales figure of €3.4 billion.

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

	2000	2008	2016	2017	Per Annum Change 2000-17	Per Annum Change 2008-17	Per Annum Change 2016-17
	€m	€m	€m	€m	%	%	%
Total All Sectors	23,057	31,507	38,089	41,450	3.5%	3.1%	8.8%
Manufacturing & Other Industry	19,643	25,435	28,038	30,910	2.7%	2.2%	10.2%
Food & Drink	9,580	10,959	13,506	15,018	2.7%	3.6%	11.2%
Traditional Manufacturing	6,442	7,486	7,879	8,472	1.6%	1.4%	7.5%
Modern Manufacturing	1,102	951	1,534	1,619	2.3%	6.1%	5.5%
Energy, Water, Waste, Construction	2,520	6,039	5,119	5,802	5.0%	-0.4%	13.3%
Infor., Comm. & Other Services	3,414	6,072	10,051	10,540	6.9%	6.3%	4.9%
Information, Comm. & Computer	1,453	1,700	3,143	3,411	5.1%	8.0%	8.5%
Bus., Financial & Other Services	1,961	4,372	6,908	7,129	7.9%	5.6%	3.2%

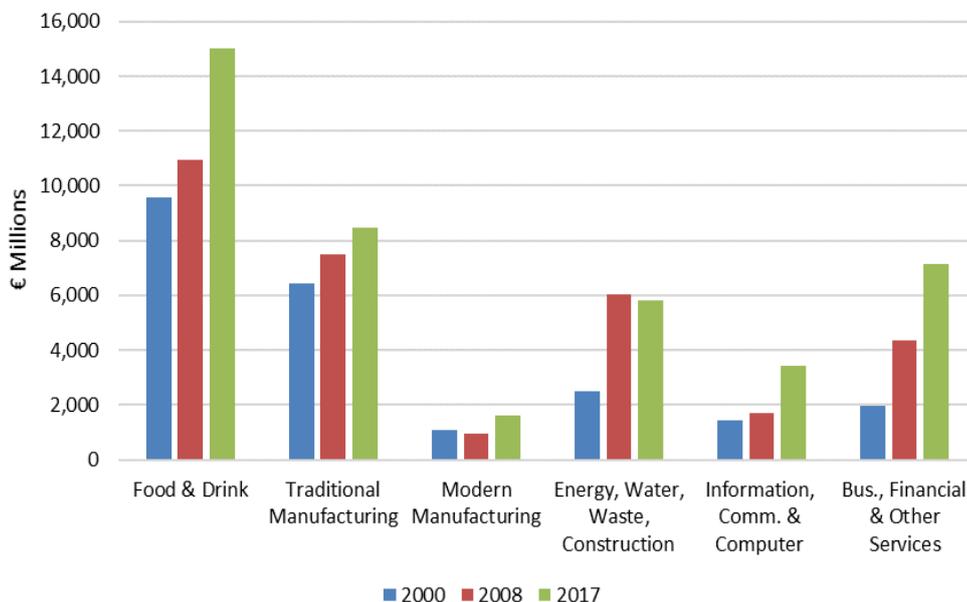
Total sales of Irish-owned manufacturing and service companies amounted to €41.5 billion in 2017 representing an 8.8% increase over the previous year's figures. There was an increase in sales of 10.2% and 4.9% between 2016 and 2017 in the Manufacturing and Services sectors.

The largest sector for Irish-owned clients is the Food & Drink sector with sales of €15.0 billion in 2017 – an increase of 11.2% over 2016 and of 2.7% per annum increase over the 2000 figure of €9.6bn.

Traditional Manufacturing saw an increase in sales of 7.5% over 2016 with sales of €8.5 billion. There has been a per annum increase of 1.6% over the 2000 figure of €6.4 billion.

Information, Communications & Other Services grew 4.9% over 2016 to €10.5 billion and had a per annum increase of 6.9% from the 2000 figure. The Business & Financial & Other sector increased sales to €7.1 billion in 2017 from €2.0 billion in 2000, an annualised increase of 7.9%.

Sales by sector - Irish-owned Client Companies



2.3 Changing Composition of Sales and Employment in Irish-owned Client Companies, 2000 and 2017

	Sales		Employment ⁶	
	2000	2017	2000	2017
Manufacturing & Other Industry	85.2%	74.6%	81.3%	67.4%
Food & Drink	41.5%	36.2%	29.4%	26.2%
Traditional Manufacturing	27.9%	20.4%	42.5%	26.7%
Modern Manufacturing	4.8%	3.9%	4.9%	4.7%
Energy, Water, Waste, Construction	10.9%	14.0%	4.5%	9.6%

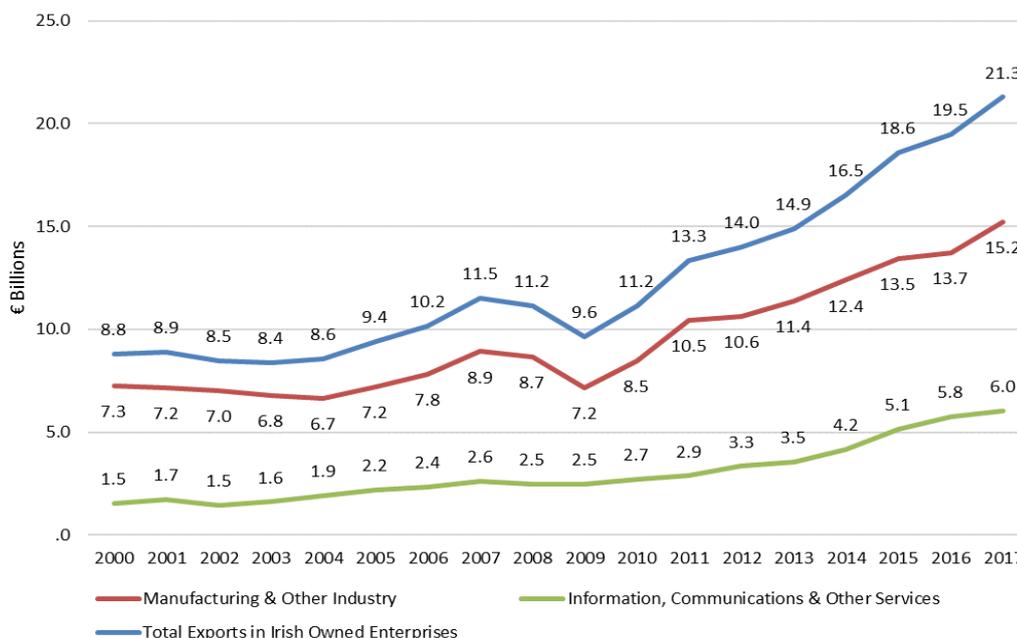
⁶ Employment shares in this table are calculated on the basis of data from the ABSEI and are not directly comparable with the results of the DBEI 'Annual Employment Survey'. The DBEI Annual Employment Survey is a census of employment in all agency-assisted companies as of 31st October. The ABSEI is based on a survey of agency-assisted companies with 10+ employees and is undertaken in the first two quarters of the year.

	Sales		Employment ⁶	
	2000	2017	2000	2017
Information, Communications & Other Services	14.8%	25.4%	18.7%	32.6%
Information, Communications & Computer	6.3%	8.2%	9.4%	13.4%
Business, Financial & Other Services	8.5%	17.2%	9.2%	19.3%

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 2017.

- The majority of Irish-owned companies operate in the Manufacturing sector, though the share of total sales accounted for by manufacturing has dropped from 85.2% in 2000 to 74.6% in 2017. The Food & Drink sector dropped its share of sales over this period from 41.5% of total Irish-owned sales to 36.2%. The Traditional Manufacturing sector accounted for 20.4% of total sales in 2017 down from 27.9% in 2000.
- The share of sales accounted for by Information, Communication and Other Services has increased from 14.8% in 2000 to 25.4% in 2017, highlighting the increasing importance of these sectors. Within this the Business, Financial and Other Services sector doubled its share of sales from 8.5% to 17.2% over the period 2000-2017.
- While the Food & Drink sector accounted for 36.2% of the sales in Irish-owned industry in 2017, it accounts for 26.2% of the employment. Traditional Manufacturing has witnessed its share of employment drop from 42.5% in 2000 to 26.7% in 2017 while the Energy, Water, Waste & Construction sectors have increased their employment from 4.5% to 9.6%.
- Overall, the Information, Communication and Other Services sector continues to see its share of Irish-owned employment rise significantly from 18.7% in 2000 to 32.6% in 2017.

2.4 Exports in Irish-owned Client Companies, 2000-2017



This graph shows the level of exports by agency-assisted Irish-owned companies during the eighteen years of this survey and shows the upward trend in the level of exports since 2009 and amounted to €21.3 billion in 2017.

Exports from the Irish-owned Manufacturing sectors in 2017 amounted to €15.2 billion, which represented 71.6% of all exports in that year. Service exports at €6.0 billion in same year represent 28.4% of total exports.

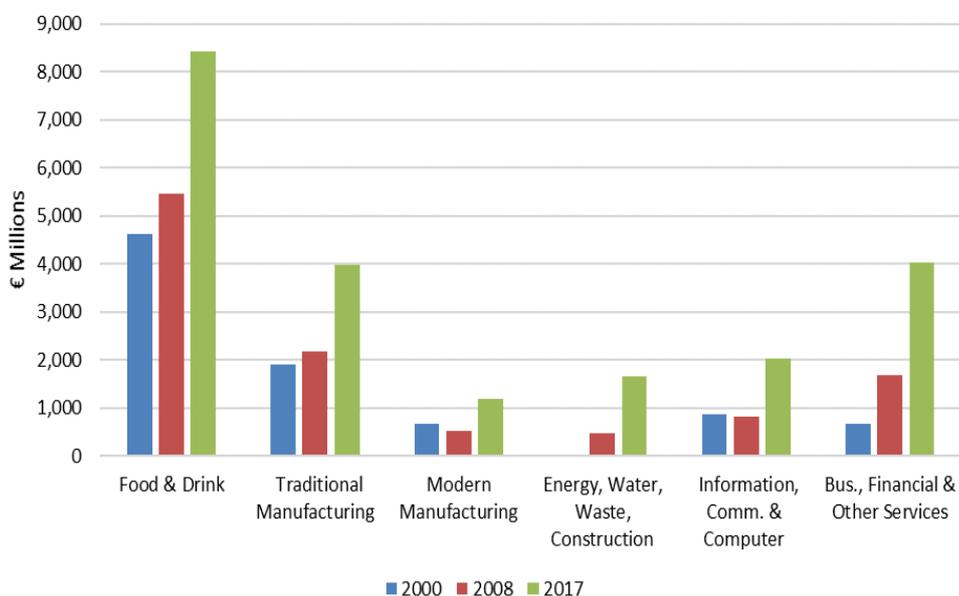
- Total exports in 2017 stood at €21.3 billion for all Manufacturing and Services companies and is the highest level of exports recorded over the course of this survey. This represents a 5.3% per annum change over the 2000 figure of €8.8 billion.
- In the Manufacturing sector, exports have increased steadily since a low in 2009 of €7.2 billion and amounted to €15.2 billion in 2017. This represents a 4.5% per annum increase on the 2000 figure of €7.3 billion and a 9.9% average per annum increase over the low point figure in 2009 of €7.2 billion. Exports in the Manufacturing sectors increased by 11.2% in 2017 over 2016.
- The value of exports in the Services sector amounted to €1.5 billion in 2000 and has consistently grown in the intervening years to €6.0 billion by 2017. This represents a per annum change of 8.4% between the 2000 and 2017 export figures. Services exports rose by 4.8% between 2016 and 2017.

2.5 Exports by Sector in Irish-owned Companies, 2000, 2008, 2016 and 2017

	2000	2008	2016	2017	Per Annum Change 2000-17	Per Annum Change 2008- 17	Per Annum Change 2016-17
	€m	€m	€m	€m	%	%	%
Total - All Sectors	8,802	11,153	19,480	21,286	5.3%	7.4%	9.3%
Manufacturing & Other Industry	7,257	8,656	13,709	15,238	4.5%	6.5%	11.2%
Food & Drink	4,628	5,473	7,384	8,418	3.6%	4.9%	14.0%
Traditional Manufacturing	1,903	2,181	3,734	3,977	4.4%	6.9%	6.5%
Modern Manufacturing	680	523	1,114	1,184	3.3%	9.5%	6.3%
Energy, Water, Waste, Construction	46	480	1,478	1,659	23.5%	14.8%	12.2%
Infor., Comm. & Other Services	1,545	2,497	5,771	6,048	8.4%	10.3%	4.8%
Information, Comm. & Computer	866	815	1,858	2,025	5.1%	10.6%	9.0%
Bus., Financial & Other Services	680	1,682	3,912	4,023	11.0%	10.2%	2.8%

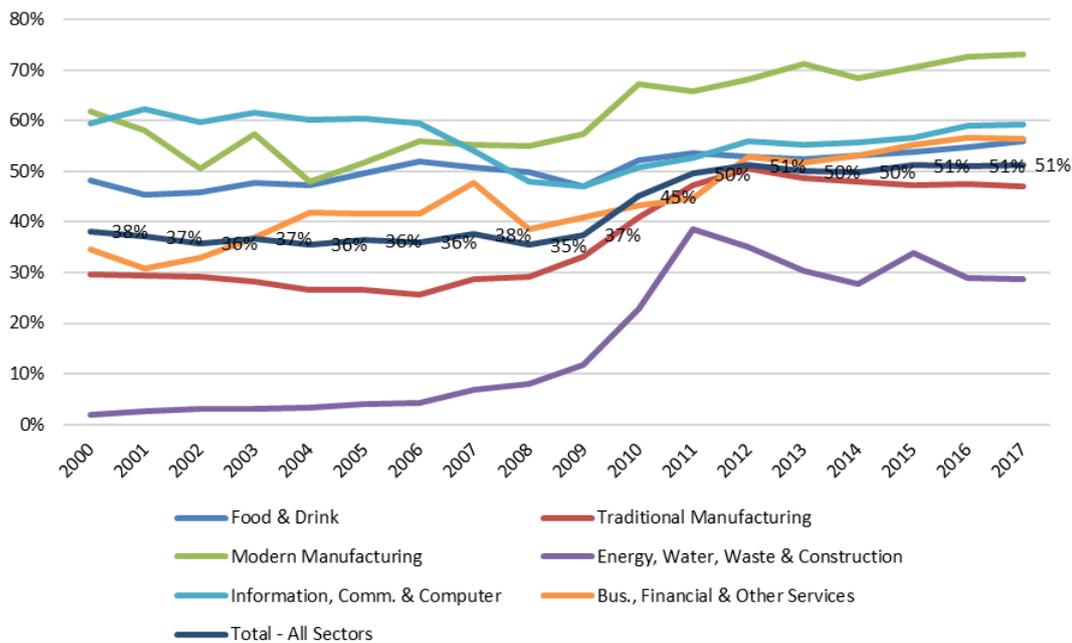
This table provides an overview of the export performance within the Irish-owned client companies in Manufacturing and Information, Communications and Other Services sectors.

Exports by Sector in Irish-owned Companies, 2000, 2008, 2017



- The Food & Drink sector accounted for 39.5% of all exports of Irish-owned client firms in 2017. This sector has increased exports from €4.6bn in 2000 to €8.4bn in 2017, a per annum increase of 3.6% in current prices.
- Exports in Traditional Manufacturing increased by 6.5% in 2017 over 2016 to €4.0 billion and now accounts for 18.7% of total exports.
- Modern Manufacturing reported an increase of 6.3% to €1.2 billion in 2017 over the 2016 figure and now accounts for 5.6% of total exports.
- The Energy, Water, Waste & Construction sectors increased by 12.2% to €1.7 billion in 2017 and now accounts for 7.8% of total exports.
- The Business, Financial and Other Services sectors exports have shown strong growth at 11.0% per annum since 2000 and exports in this sector amounted to €4.0 billion in 2017. This sector now accounts for 18.9% of total exports.
- Exports of Information, Communication & Computer services among Irish-owned firms show a per annum growth of 5.1% since 2000 to stand at €2.0 billion in 2017. This sector now accounts for 9.5% of total exports.

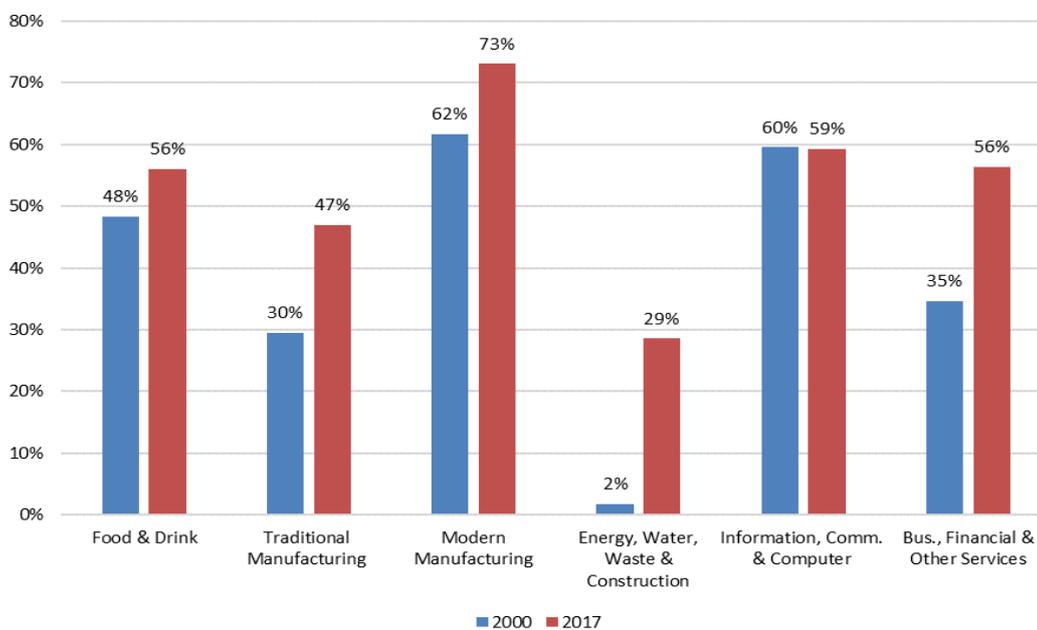
2.6 Exports as a percentage of Total Sales in Irish-owned Companies, 2000–2017



Linking the data on sales and exports allows us to make an assessment in relation to the export intensity of Irish-owned industry (i.e. exports as a percentage of sales). Overall, there has been a high degree of convergence as regards the level of export intensity with the overall average for all sectors standing at approximately 51% in the last three years.

The above graph shows that the total export intensity of Irish-owned industry has increased from 38% in 2000 to 51% in 2017 and highlights the growing importance to Irish businesses of export markets.

Exports as a percentage of Total Sales in Irish-owned Companies, 2000 and 2017



This chart compares the export intensity of Irish-owned industry by sector for 2000 and 2017.

- The Food & Drink sector accounted for 39.5% of all export sales by Irish-owned companies in 2017 and has an export intensity of 56% in 2017 which is an increase on its 2000 intensity ratio of 48%.
- The sectors with the highest export intensity at 73% in 2017 are in Modern Manufacturing (Chemicals, Medical Devices and Computer, Electronic & Optical Products)
- The Information, Communication and Computer sectors are next with 59% of all sales being exported in 2017, approximately the same level as it was in 2000.

2.7 Value Added in Irish-Owned Companies, 2000-2017

	Total Value Added			Value Added as % of Sales		Value Added per Person Employed		
	2000	2017	Per Annum Change 2000-17	2000	2017	2000	2017	Per Annum Change 2000-17
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	6,864	14,544	4.5%	29.8%	35.1%	48.0	88.9	3.7%
Manufacturing & Other Industry	4,864	8,333	3.2%	24.8%	27.0%	41.8	75.6	3.6%
Food & Drink	1,497	2,784	3.7%	15.6%	18.5%	35.5	64.6	3.6%
Traditional Manufacturing	2,333	3,156	1.8%	36.2%	37.3%	38.3	72.2	3.8%
Modern Manufacturing	319	502	2.7%	28.9%	31.0%	45.4	65.3	2.2%
Energy, Water, Waste, Construction	716	1,890	5.9%	28.4%	32.6%	111.6	120.6	0.5%
Info./Comm./ Other Services	2,000	6,211	6.9%	58.6%	58.9%	74.9	116.4	2.6%
Information, Comm. & Computer	811	2,096	5.7%	55.8%	61.4%	60.1	95.8	2.8%
Business, Fin. & Other Services	1,189	4,115	7.6%	60.6%	57.7%	89.9	130.7	2.2%

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 €14.5 billion in 2017. Total value added is estimated to have grown by 3.7% per annum in nominal terms over the period 2000-2017.
- Across all Irish-owned Manufacturing and Information, Communication and Other Services sectors, value added as a percentage of sales has increased from 29.8% in 2000 to 35.1% in 2017.

- Overall, value added per person employed in Manufacturing and Information, Communication and Other Services is estimated at €88,936 in 2017, an increase of 3.7% 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 2017

	Total Payroll			Payroll per Employee		
	2000	2017	Per annum change 2000-17	2000	2017	Per annum change 2000-17
	€m	€m	%	€k	€k	%
Total - All Sectors	4,013	8,094	4.2%	28.0	49.5	3.4%
Manufacturing & Other Industry	3,113	5,054	2.9%	26.7	45.9	3.2%
Food & Drink	1,107	1,755	2.7%	26.3	40.8	2.6%
Traditional Manufacturing	1,467	2,013	1.9%	24.1	46.0	3.9%
Modern Manufacturing	199	381	3.9%	28.3	49.5	3.4%
Energy, Water, Waste, Construction	341	904	5.9%	53.1	57.6	0.5%
Info./ Comm./Other Services	900	3,041	7.4%	33.7	57.0	3.1%
Information, Comm./ Computer	550	1,357	5.5%	40.8	62.0	2.5%
Business, Financial & Other Services	350	1,684	9.7%	26.4	53.5	4.2%

This table shows that the total amount paid by Irish-owned Manufacturing and Information, Communication and Other Services on payroll (including taxes etc.) was approximately €8.1 billion in 2017.

- Total payroll has increased at a rate of 4.2% per annum over the period 2000-2017. Payroll in the Manufacturing sector and the Information, Communication and Other Services sector increased from €4.0 billion in 2000 to €8.1 billion in 2017.
- Manufacturing and Other Industry firms account for 62.4% (€5.1 billion) of total payroll and Information, Communication and Other Internationally Traded Services firms account for the remaining 37.6% (€3.0 billion) in 2017.

Payroll per employee in Irish-owned Manufacturing and Information, Communication and Other Services sectors averaged at €49,496 in 2017, representing an increase of 3.4% per annum over the period 2000 to 2017.

- In the Manufacturing sector, payroll per employee increased from €26,726 in 2000 to €45,873 in 2017. This is a per annum increase of 3.2%.
- In the Information, Communication and Other Services sectors, payroll per employee increased by 3.1% per annum going from €33,658 in 2000 to €56,973 in 2017.
- The highest average payroll per employee figure in 2017, was €62,010 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, 2017

	Materials Purchased 2017			Services Purchased 2017		
	Total	Irish	Irish as %	Total	Irish	Irish as %
	Materials	Materials	Total	Services	Services	Total
	€m	€m	%	€m	€m	%
Total - All Sectors	18,595	11,625	62.5%	8,311	5,381	64.7%
Manufacturing & Other Industry	17,177	11,106	64.7%	5,400	4,023	74.5%
Food & Drink	10,665	8,279	77.6%	1,569	1,318	84.0%
Traditional Manufacturing	4,406	1,635	37.1%	1,201	978	81.5%
Modern Manufacturing	884	172	19.5%	233	163	70.3%
Energy, Water, Waste, Construction	1,514	1,020	67.4%	2,398	1,563	65.2%
Information, Comm. & Other Services	1,418	519	36.6%	2,911	1,359	46.7%
Information, Comm. & Computer	477	142	29.9%	838	494	58.9%
Business, Financial & Other Services	941	376	40.0%	2,073	864	41.7%

Total raw materials purchases amounted to approximately €18.6 billion in 2017, of which €11.6 billion (62.5%) was sourced in Ireland.

- Within the Food and Drink sector, Irish raw materials at €8.3 billion accounted for 77.6% of the total materials spend in that sector. Of all the Irish raw materials purchases by Irish-owned firms, the majority or 71.2% related to the Food and Drink sector in 2017.
- Within the Traditional Manufacturing sectors, 37.1% of materials were sourced in Ireland in 2017, amounting to over €1.6 billion in value.
- For Modern Manufacturing, 19.5% of total materials purchases were Irish materials, amounting to €172 million.
- In the Energy, Water, Waste & Construction sectors 67.4% of all materials were bought in Ireland in 2017.

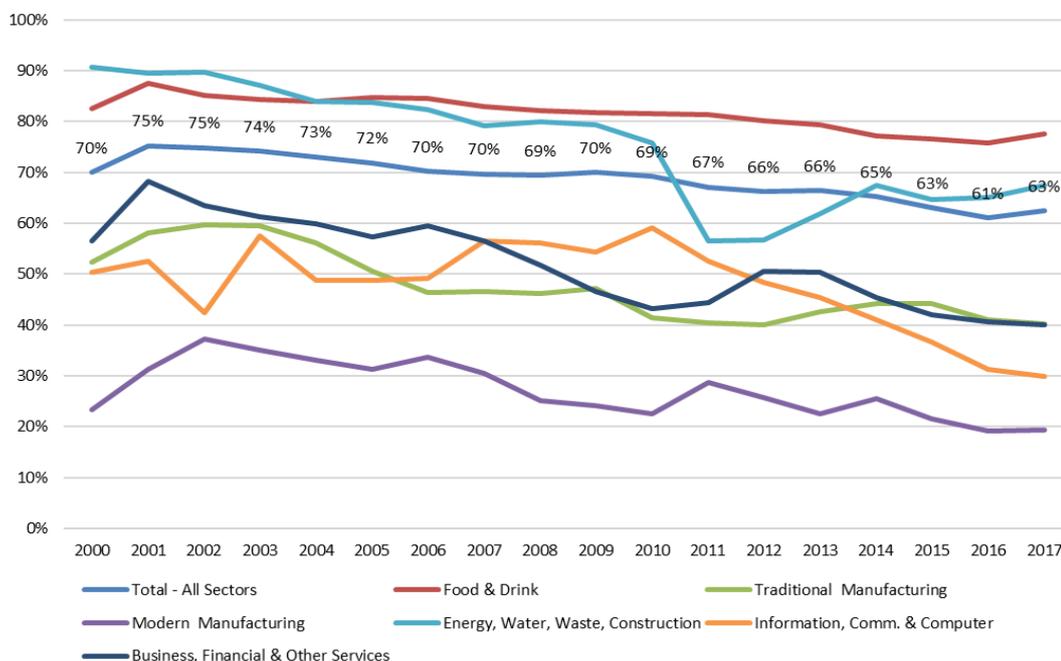
In addition to raw materials, Irish-owned Manufacturing and Information, Communication and Other Services firms spent a further €8.3 billion on services in 2017, with 64.7%, or €5.4 billion sourced in Ireland.

- The proportion of Irish services purchased by Irish-owned firms, ranges from 46.7% for Information, Communication and Other Services firms to 74.5% for Manufacturing & Other Industry firms.
- Overall, the €11.6 billion of materials purchased in Ireland in 2017 continue to significantly outweigh the services purchased in Ireland which stand at €5.4 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, 2000-2017

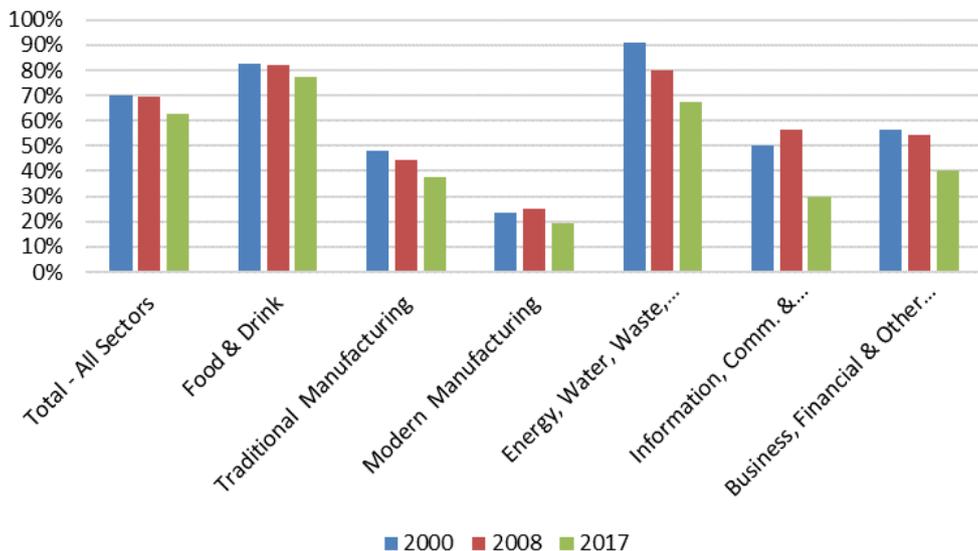


This graph maps out the share of total materials sourced in Ireland by Irish-owned Manufacturing and Services firms. In 2017, 63% of all materials purchased were sourced in Ireland compared with 70% in 2000. The 2017 returns showed an increase of 2% over the 2016 figures.

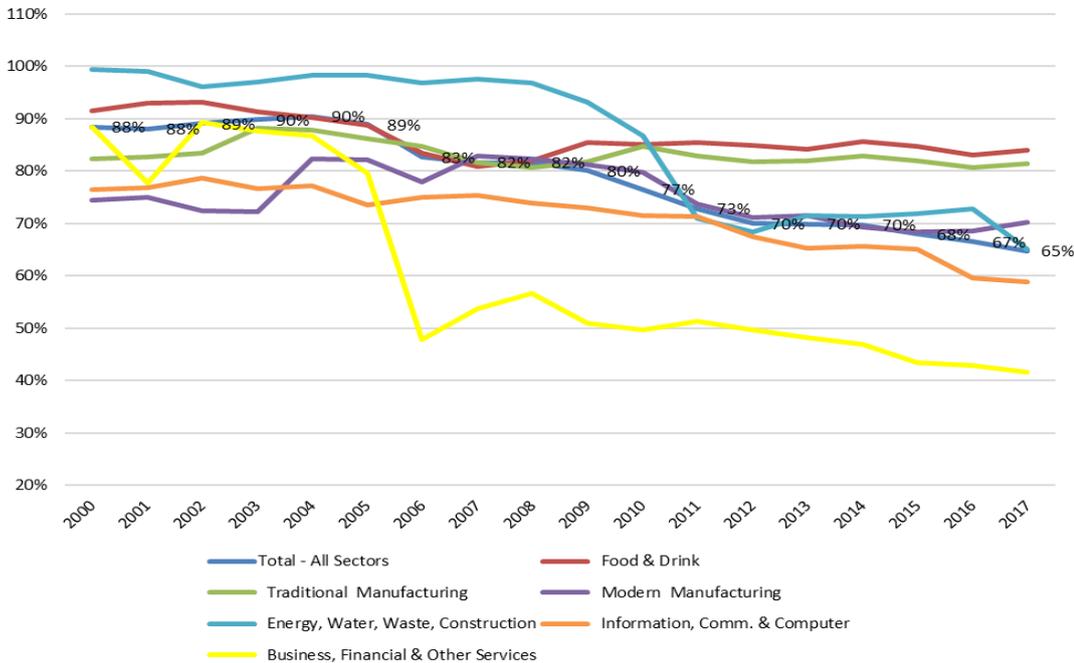
The bar chart below sets out the position by sector for 2000, 2008 and 2017:

- The Food & Drink sector purchased the majority or 77.6% of its materials in Ireland in 2017. This represents a decline from the 2000 and 2008 figures of 83% and 82%. (Absolute value was €8,279m).
- 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 91%, but in 2017 the percentage of Irish sourced materials was 67% (Absolute value was €1,020m).
- The Traditional Manufacturing sector share of Irish-sourced materials stood at 48% in 2000 and has decreased since and its purchases of Irish-sourced materials now represent 38% of total materials outlay in 2017. (Absolute value was €1,658m).
- The total value of Irish materials purchased by the services sectors amounted to €519m in 2017, 36.6% of their total spend on materials.

Irish-Sourced Materials as a Share of Total Material Purchased, 2000, 2008, 2017



2.11 Irish-Sourced Services as a Share of All Service Purchased, 2000-2017



This graph shows the share of total services sourced in Ireland by Irish-owned Manufacturing and Services firms. At 67%, the majority of services' purchases were sourced in Ireland in 2017 though this represents a decline from 88% from 2000.

The bar-chart below shows that purchases of Irish services ranged between 42% in the Business, Finance & Other Services sector to 84% in the Food and Drink sectors in 2017. 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 84% in 2017. (Absolute value was €1,318m).

Traditional Manufacturing has maintained its share of Irish services purchases at approximately 80% through 2000, 2008 and 2015. (Absolute value was €1,021 million).

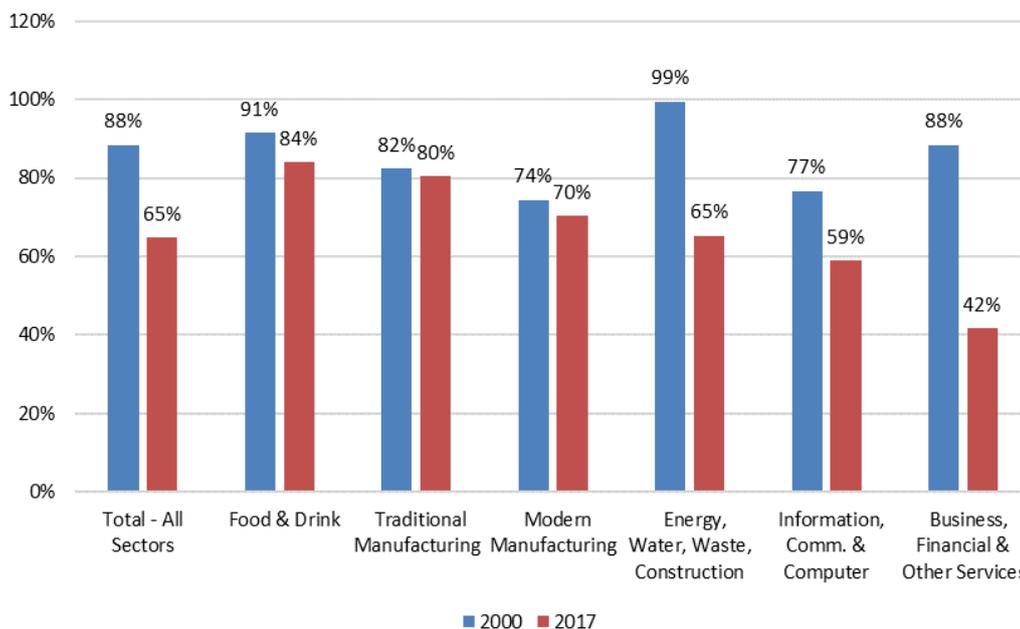
The Modern Manufacturing sector’s share of services sourced in Ireland dropped from 74% in 2000 to 70% in 2017. (Absolute value was €163 million).

The Information, Communications and Computer sector’s share of services purchases sourced in Ireland fell from 77% in 2000 to 59% in 2017. (Absolute value was €494 million).

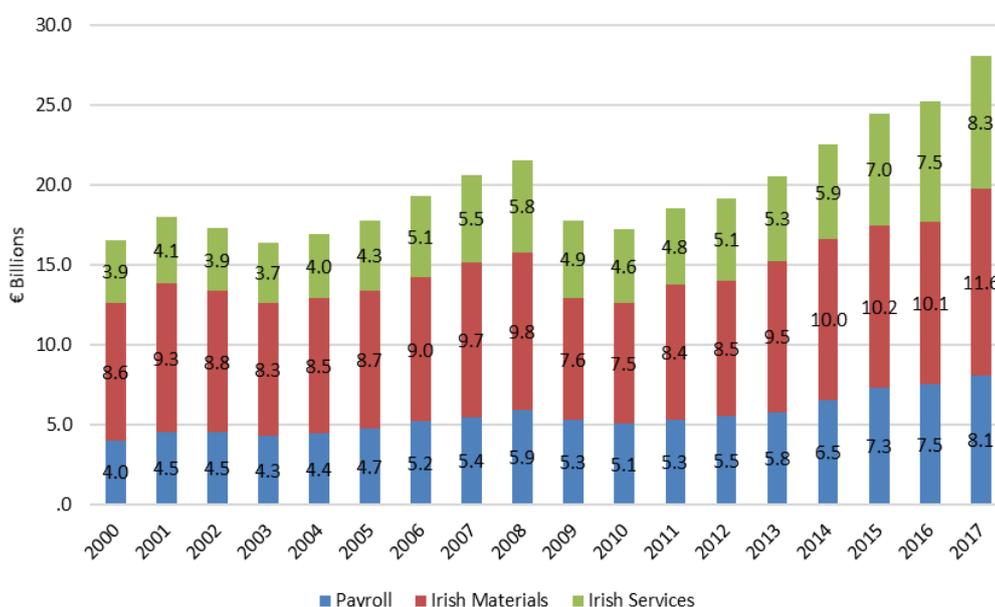
The Business, Financial and Other Services sector sourced 42% of their services requirements in Ireland in 2017, down from 88% in 2000. (Absolute value was €864 million).

The Energy, Water, Waste & Construction sectors sourced 65% of their services in Ireland at a value of €1,563m.

Irish-Sourced Services as a Share of All Service Purchased, 2000 and 2017



2.12 Total Direct Expenditure in the Irish Economy by Irish-Owned Companies, 2000-2017



This chart summarises the total expenditure in the domestic economy by Irish-owned manufacturing and services firms throughout the period 2000-2017.

- In total, Irish-owned firms spent €28.0 billion in the domestic economy in 2017, comprising of:
 - €8.1 billion on payroll;
 - €11.6 billion on Irish raw materials;
 - €8.3 billion on Irish services.

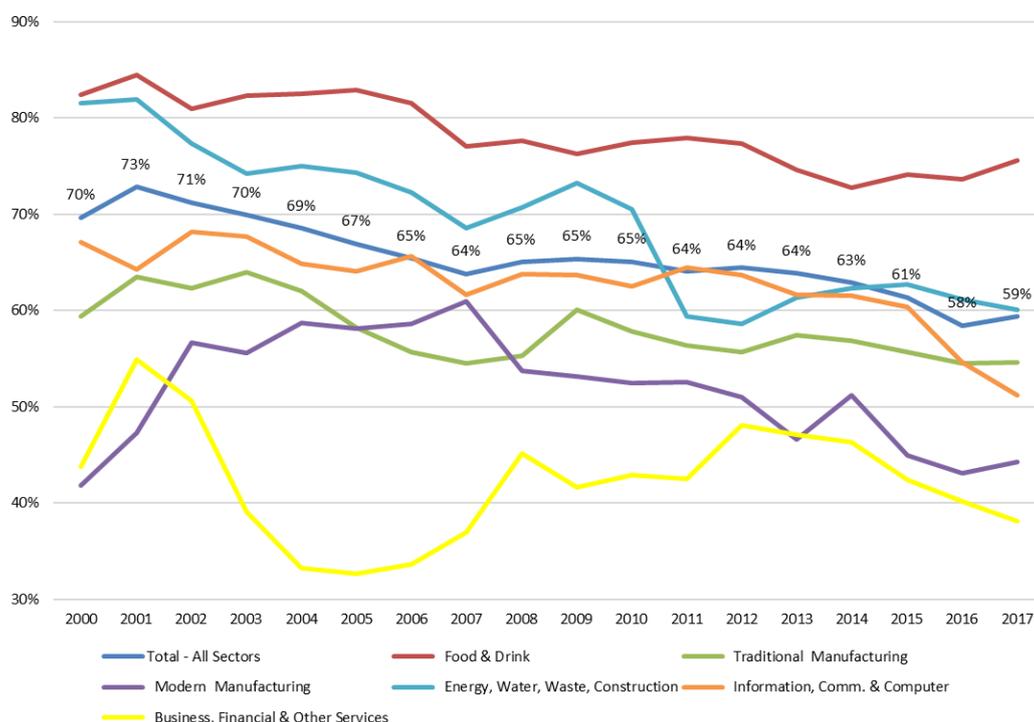
This represents an annual increase in 2017 of 11.3% over 2016 returns.

- Direct expenditure has increased from €16.5 billion in 2000 and shows an overall nominal increase of 3.2% per annum between 2000 and 2017. Over the period 2000 to 2017:
 - Expenditure on payroll increased at 4.2% per annum.
 - Expenditure on materials sourced in Ireland has increased by 1.8% per annum.
 - Expenditure on services sourced in Ireland has increased by 4.5% per annum.
- The composition of direct expenditure has changed over this series. In 2000 payroll made up 24%, Irish materials were 52% and Irish services were 24% of total Irish economy expenditure. In 2017, these shares have changed, with payroll now making up 29%, Irish materials accounting for 41% and Irish services accounting for 30% 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, 2000-2017

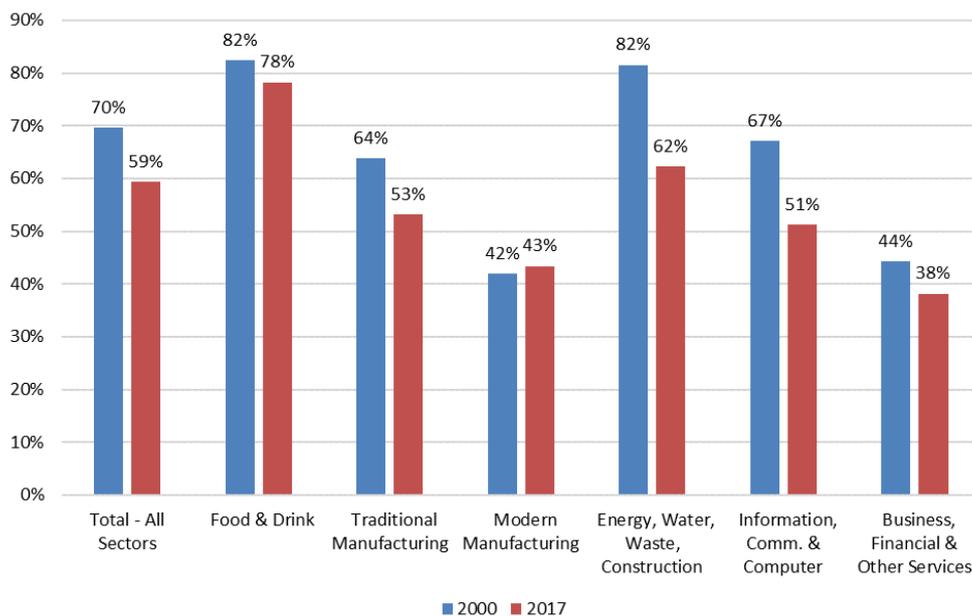


This chart shows the trend in direct expenditure in the economy as a percentage of sales for all Irish-owned firms and for the broad aggregated sectors.

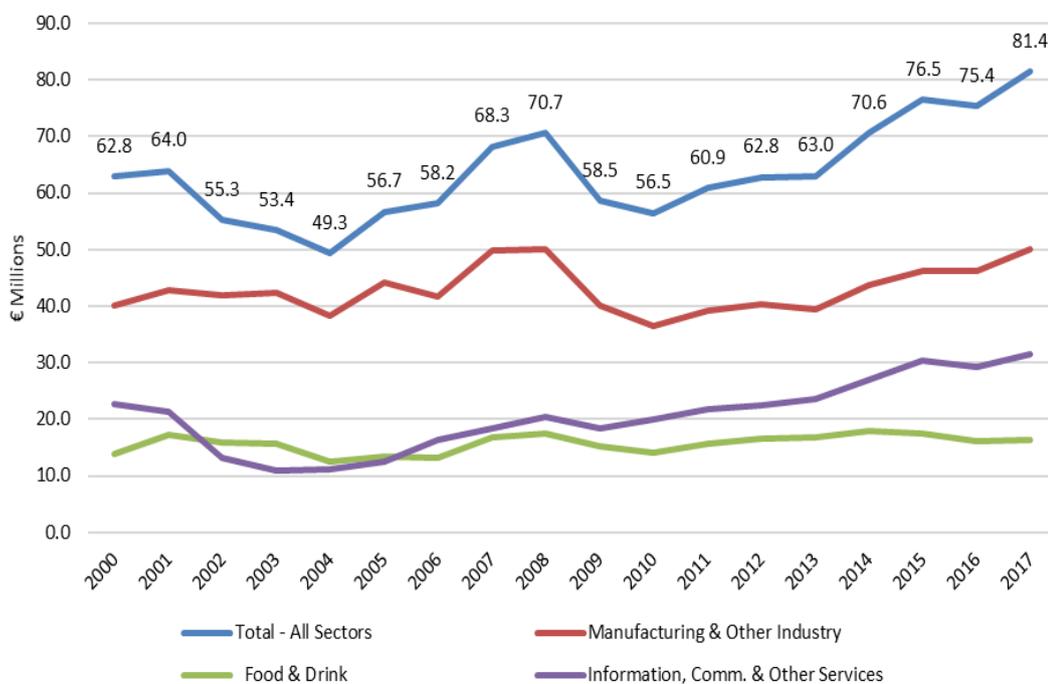
Total direct expenditure as a percentage of sales stood at 70% in 2000. By 2008 this percentage had reduced to 65% and in 2017 stands at 59%.

- The Food and Drink sector maintained the highest share of direct expenditure as a percentage of sales at 78% in 2017 down from 82% in 2000.
- The Energy Water, Waste and Construction sector also saw a fall-off on this metric from 82% in 2000 to 62% in 2017.
- In percentage terms direct expenditure in the Information, Communications and Computer Services sector stood at 67% of sales in 2000 and decreased to 51% in 2017.
- 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, 2000-2017



Total expenditure on training amounted to €81.4 million in 2017. This is the highest amount Irish-owned companies spent on formal structured training in the time series.

- The manufacturing and other sectors spent €50.0 million on training in 2017, accounting for 61.4% of total training expenditure.
- Expenditure on training in the services sectors also increased in 2017 to €31.4 million.

The sector with the largest spend on training is the Food & Drink sector.

- The Food & Drink sector spent €16.3 million on training in 2017 which represents 20.1% of all training expenditure by all Irish-owned client companies.

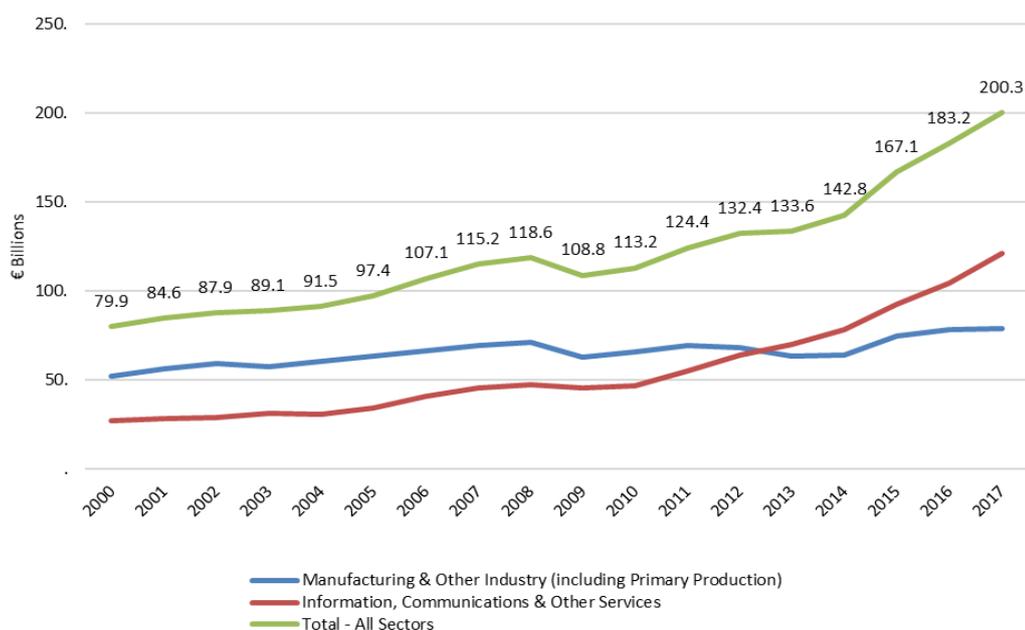
Overall expenditure on training per person employed in Irish-owned companies increased from €485k in 2016 to €498k in 2017.

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, 2000-2017



Total sales of foreign-owned agency assisted companies increased by 9.3% per annum in nominal terms over 2016, amounting to €200.3 billion in 2017.

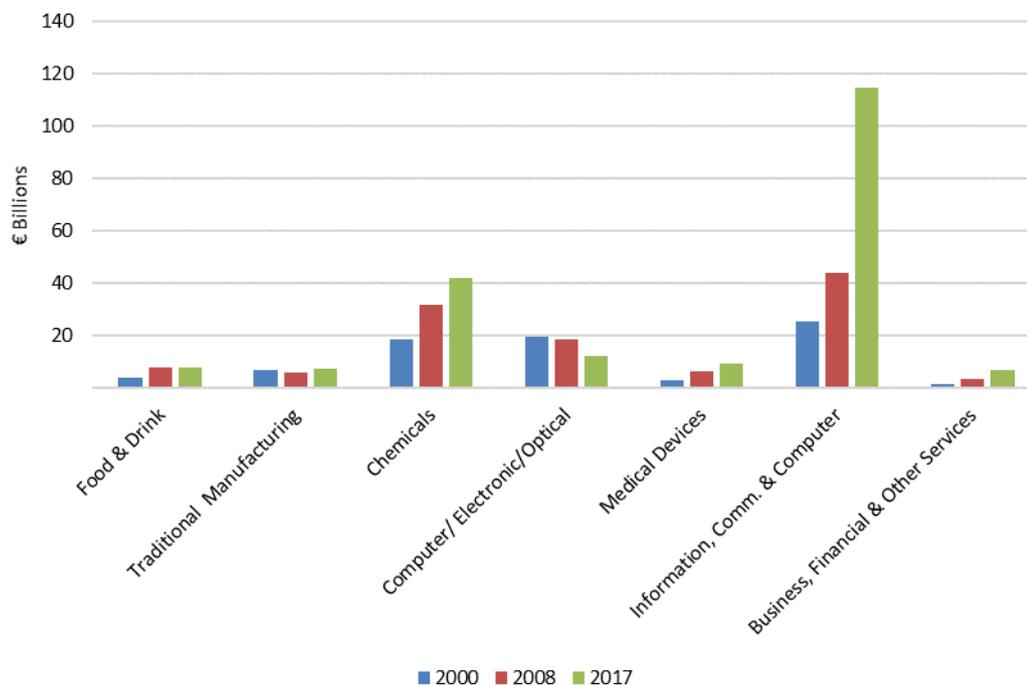
- Manufacturing and Other Industry sectors accounted for €78.9 billion of total sales, equating to 39.4% of all sales in foreign-owned companies.
 - Sales in the Manufacturing sectors increased by 0.6% in 2017 over the previous year.
 - The per annum average increase over the eighteen years from 2000-2017 for Manufacturing sectors is 2.4%. Sales have fluctuated since 2008 but the last four years saw a substantial recovery in the value of total sales.
- For the first time in 2013, sales in the Internationally-traded Services⁷ sectors exceeded those of the Manufacturing sectors and this trend has continued.
 - Internationally-traded Services sales have steadily increased from €27.4 billion in 2000 to €121.4 billion in 2017. This is a per annum average increase of 9.1% over that eighteen-year period.
 - The 2017 sales figure of €121.4 billion represents an increase of 15.9% over the 2016 sales figure of €104.8 billion.

⁷ Agency client companies in the International Financial Services sector are not included in this survey. For a full list of the services sectors see Appendix 2

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

	2000	2008	2016	2017	Per Annum Change 2000-17	Per Annum Change 2008-17	Per Annum Change 2016-17
	€m	€m	€m	€m	%	%	%
Total - All Sectors	79,911	118,594	183,180	200,289	5.6%	7.0%	9.3%
Manufacturing & Other Industry	52,463	71,180	78,379	78,851	2.4%	2.5%	0.6%
Food & Drink	4,107	7,801	7,757	7,901	3.9%	1.9%	1.9%
Traditional Manufacturing	6,746	6,085	7,093	7,300	0.5%	6.5%	2.9%
Chemicals	18,658	32,112	41,349	41,851	4.9%	1.6%	1.2%
Computer/ Electronic/Optical	19,630	18,776	12,941	12,241	-2.7%	3.3%	-5.4%
Medical Devices	3,298	6,338	9,176	9,493	6.4%	3.7%	3.5%
Infor., Comm. & Other Services	27,448	47,415	104,801	121,438	9.1%	11.4%	15.9%
Infor., Comm. & Computer	25,698	44,065	98,909	114,497	9.2%	11.7%	15.8%
Bus., Financial & Other	1,750	3,349	5,892	6,941	8.4%	7.7%	17.8%

Sales by sector - Foreign-owned Companies, 2000, 2008, 2017



Between 2000 and 2017, the Information, Communications and Computer Services sector, recorded a per annum growth of 9.1% and at €121.4 billion represented 60.6% of total sales by foreign-owned client firms in 2017.

- The Chemicals sector accounted for 20.9% of total sales in 2017. Sales in the sector totalled €41.9 billion in 2017, a per annum increase of 4.9% over the 2000 sales figure of €18.7 billion.
- The Computer, Electronic and Optical Products sector reported sales of €12.2 billion in 2017, a 5.4% decrease over the 2016 figure of €12.9 billion. This is a sector that has seen a per annum decrease of 2.7% since 2000.

3.3 Changing Composition of Sales and Employment in Foreign-owned Client Companies 2000 and 2017

	Sales		Employment ⁸	
	2000	2017	2000	2017
Manufacturing & Other Industry	65.7%	39.4%	73.4%	50.7%
Food & Drink	5.1%	3.9%	6.2%	3.7%
Traditional Manufacturing	8.9%	3.6%	25.5%	10.8%
Chemicals	23.3%	20.9%	13.4%	12.3%
Computer, Electronic & Optical Products	24.6%	6.1%	19.0%	8.0%
Medical Devices	4.1%	4.7%	9.2%	15.8%
Information, Comm. & Other Services	34.3%	60.6%	26.6%	49.3%
Information, Comm. & Computer	32.2%	57.2%	24.2%	38.3%
Business, Financial & Other Services	2.2%	3.5%	2.4%	11.0%

This table traces the evolution of the foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services base over the period 2000 to 2017.

In terms of sales, the relative importance of manufacturing activity has decreased, accounting for 39.4% of all sales in 2017, down from 65.7% in 2000. The Information, Communication & Other Services now accounts for 60.6% of sales, up from 34.3% in 2000.

In 2017, the following two sectors made up 78.1% of total sales of foreign-owned companies:

- Information, Communication and Computer Services sector (57.2%)
- Chemicals sector (20.9%)

⁸ Employment shares in this table are calculated on the basis of data from the ABSEI and are not directly comparable with the results of the DBEI 'Annual Employment Survey'. The DBEI Annual Employment Survey is a census of employment in all agency-assisted companies as at 31st October. The ABSEI is based on a survey of agency-assisted companies with 10+ employees and is undertaken in the first two quarters of the year.

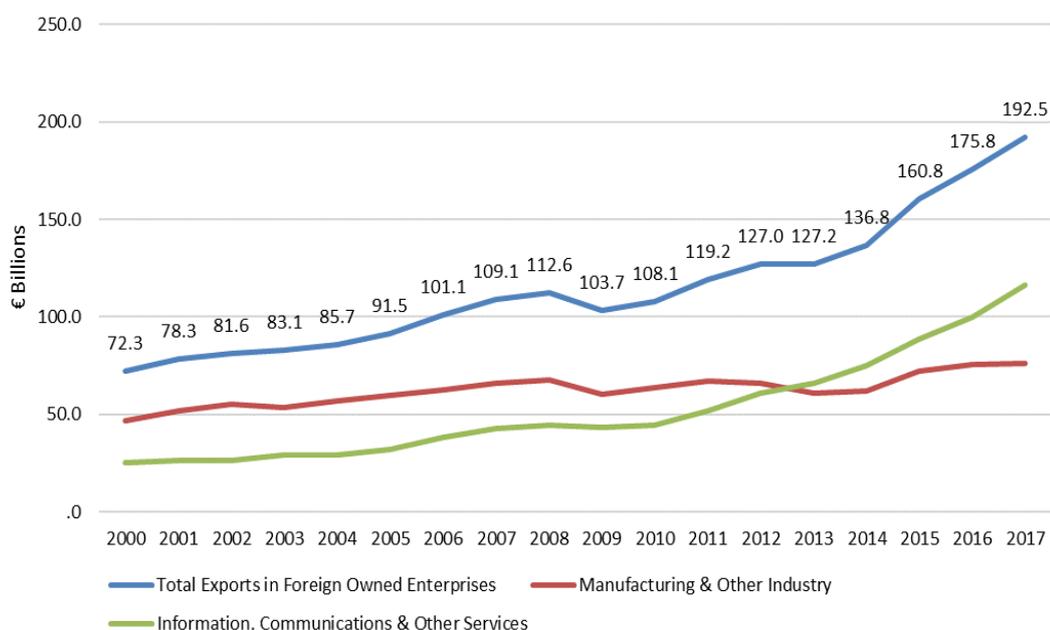
In terms of employment, a different pattern emerges, with Manufacturing accounting for just over half of employment (50.7%) in 2017.

- The Medical Devices sector has 15.8% of employment, up from 9.2% in 2000.
- The Chemicals sector is the next most significant in terms of employment with 12.3% which is a decrease on the 2000 figure of 13.4%.

In Internationally-traded Services:

- The Information, Communications and Computer Services sector has the highest share of total employment, at 38.3% in 2017, up from 24.2% in 2000.

3.4 Exports in Foreign-owned Client Companies, 2000-2017



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

The 2017 export sales figure of foreign-owned companies in Ireland at €192.5 billion equates to 96% of the total reported sales by these firms.

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

- Exports in the Services sectors increased by 16.2% in 2017 over the 2016 figure of €100.2 billion and with the exception of 2009 have recorded increases in every year since 2004.
 - The Information, Communications and Computer Services sector accounted for 60.5% of all export sales in 2017 at €116.4 billion.

- This important sector has seen an annual average increase of 9.4% in the eighteen-year period between 2000 and 2017.
- The Manufacturing sectors accounted for 39.5% of all exports in foreign-owned companies in Ireland in 2017 and amounted to €76.1 billion.
 - Manufacturing exports increased by 0.6% in the last year over the 2016 export sales figure of €75.6 billion.
 - The average annualised increase in Manufacturing exports since 2000 is 2.9% from a base of €46.9 billion in current prices, with notable decreases in 2009, 2012 and 2013 before recovering in 2014, 2015, 2016 and 2017.

3.5 Exports by Sector in Foreign-owned Companies, 2000, 2008, 2016 and 2017

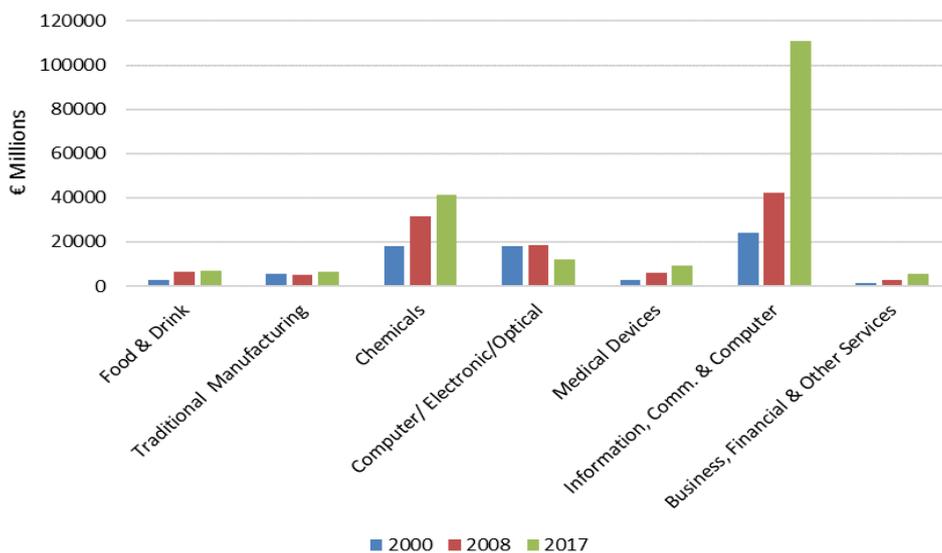
	2000	2008	2016	2017	Per Annum Change 2000-17	Per Annum Change 2008-17	Per Annum Change 2016-17
	€m	€m	€m	€m	%	%	%
Total All Sectors	72,262	112,577	175,837	192,521	5.9%	6.1%	9.5%
Manufacturing & Other Industry	46,904	67,848	75,612	76,089	2.9%	1.3%	0.6%
Food & Drink	2,537	6,276	6,713	6,854	6.0%	1.0%	2.1%
Traditional Manufacturing	5,352	5,173	6,219	6,428	1.1%	2.4%	3.3%
Chemicals	17,860	31,687	40,864	41,380	5.1%	3.0%	1.3%
Computer, Electronic & Optical	18,170	18,481	12,711	12,010	-2.4%	-4.7%	-5.5%
Medical Devices	2,963	6,205	9,046	9,357	7.0%	4.7%	3.4%
Infor., Comm. & Other Services	25,358	44,729	100,225	116,432	9.4%	11.2%	16.2%
Infor., Comm. & Computer	24,048	42,090	95,687	110,838	9.4%	11.4%	15.8%
Bus., Financial & Other Services	1,310	2,640	4,538	5,594	8.9%	8.7%	23.3%

The Information, Communications & Computer services sector had the largest level of exports in 2017 at €110.8 billion. This is an increase of 15.8% over 2016 and an 9.4% annual increase in nominal terms since 2000 when exports stood at €24.0 billion.

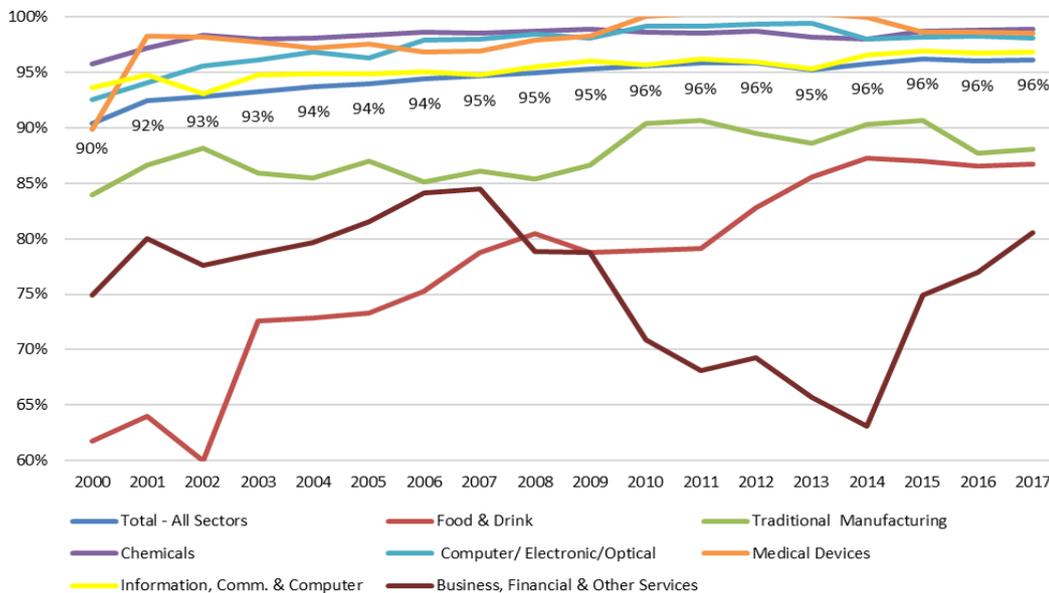
Exports in the Chemicals sector were also significant in 2017 at €41.4 billion an increase of 1.3% over 2016 and an averaged increase of 5.1% since 2000.

The Computer, Electronic & Optical sector saw a 5.5% decrease in 2017 over 2016 with exports of €12.0 billion. This sector’s exports experienced an average annual decrease of 2.4% between 2000 and 2017.

Exports by Sector in Foreign-owned Companies, 2000, 2008, and 2017

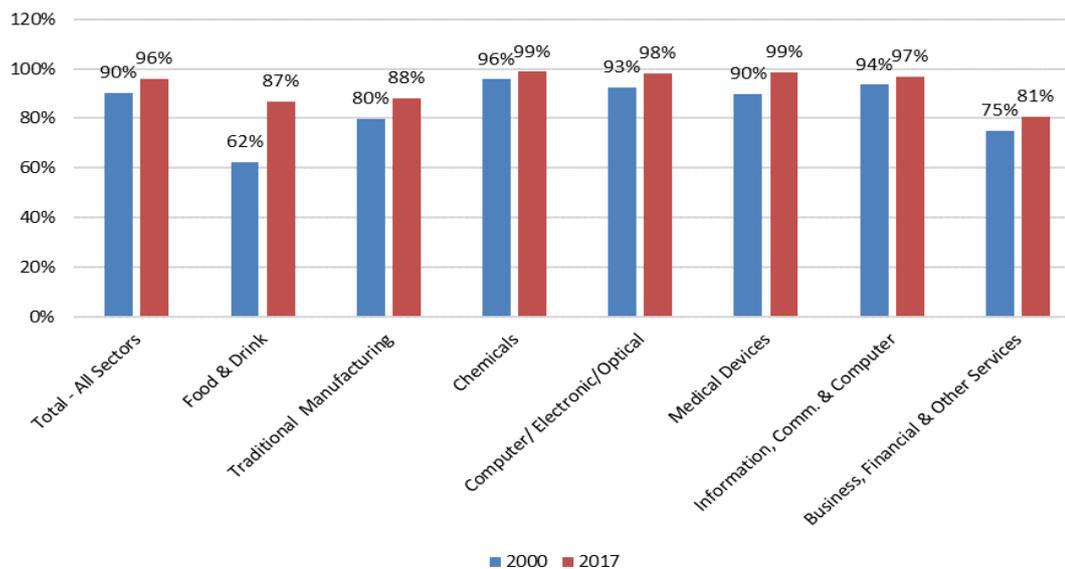


3.6 Exports as a percentage of Total Sales in Foreign-owned Companies, 2000-2017



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

Exports as a percentage of Total Sales in Foreign-owned Companies, 2000, 2017



- The foreign-owned high-tech manufacturing sectors of: Chemicals, Computer, Electronic & Optical Products and Medical Devices produce goods almost exclusively for export with approximately 99% and 99% of all sales being exported respectively.
- The Information, Communication and Computer Services sector exported 97% of their services in 2017, up from 94% in 2000.
- The Food & Drink sector, with an 87% share of sales for export in 2017, increased its proportion of exports from 62% in 2000.
- Similarly, the Traditional Manufacturing sector has increased its proportion of sales for export, from 80% in 2000 to 88% in 2017.

3.7 Value Added in Foreign-owned Companies, 2000-2017

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2017	Per Annum Change 2000-17	2000	2017	2000	2017	Per Annum Change 2000-17
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	33,859	61,930	3.6%	42.4%	30.9%	202.4	374.6	3.7%
Manu./ Other Industry	24,093	34,931	2.2%	45.9%	44.3%	196.2	416.6	4.5%
Food & Drink	1,897	3,797	4.2%	46.2%	48.1%	182.3	614.6	7.4%
Traditional Manu.	2,361	2,938	1.3%	35.0%	40.2%	55.4	164.1	6.6%
Chemicals	10,502	17,093	2.9%	56.3%	40.8%	469.6	843.3	3.5%
Computer, Electronic & Optical	7,464	6,923	-0.4%	38.0%	56.6%	234.5	525.5	4.9%
Medical Devices	1,858	4,172	4.9%	56.3%	43.9%	120.3	159.3	1.7%
Inform./ Comm. & Other Services	9,766	26,999	6.2%	35.6%	22.2%	219.3	331.4	2.5%
Information/ Comm. & Computer	8,486	22,925	6.0%	33.0%	20.0%	209.4	362.3	3.3%

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2017	Per Annum Change 2000-17	2000	2017	2000	2017	Per Annum Change 2000-17
	€m	€m	%	%	%	€k	€k	%
Business, Fin. & Other Services	1,280	4,074	7.0%	73.2%	58.7%	319.5	224.2	-2.1%

The total value added of foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €61.9 billion in 2017.

Although total value added grew at a rate of 3.6% per annum in nominal terms over the period 2000-2017, there are differences at sectoral level. There was growth of 6.2% per annum in value added in the Information, Communication and Other Internationally Traded Services sectors over this period and growth of 2.2% per annum in the manufacturing sectors.

Across all foreign-owned sectors, value added as a percentage of sales has dropped from 42.4% in 2000 to 30.9% in 2017.

Overall, value added per person employed in Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €374,637 in 2017, an increase of 3.7% 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 2017

	Total Payroll			Payroll per Employee		
	2000	2017	Per annum change 2000- 17	2000	2017	Per annum change 2000- 17
	€m	€m	€m	€k	€k	%
Total - All Sectors	6,082.9	12,268.8	4.2%	36.4	74.2	4.3%
Manufacturing & Other Industry	4,301.4	6,001.8	2.0%	35.0	71.6	4.3%
Food & Drink	432.9	504.6	0.9%	41.6	81.7	4.0%
Traditional Manufacturing	1,274.3	1,025.8	-1.3%	29.9	57.3	3.9%
Chemicals	946.5	1,830.6	4.0%	42.3	90.3	4.6%
Computer Electronic Optical	1,201.5	948.1	-1.4%	37.7	72.0	3.9%
Medical Devices	435.3	1,680.1	8.3%	28.2	64.1	5.0%
Info./ Comm./Other Services	1,781.5	6,267.0	7.7%	40.0	76.9	3.9%
Information, Comm. & Computer	1,597.6	4,898.8	6.8%	39.4	77.4	4.0%
Business, Financial & Other Services	183.9	1,368.2	12.5%	45.9	75.3	3.0%

The total payroll bill of foreign-owned firms amounted to €12.3 billion in 2017 with manufacturing accounting for €6.0 billion (48.9%) and services contributing the balance of €6.3 billion (51.1%).

Total payroll per person employed averaged €77,441 in 2017, representing an increase of 4.6% per annum in nominal terms over the period 2000-2017.

Payroll per employee in the Information, Communication and Other Internationally Traded Services sector and the Manufacturing sectors averaged €82,556 and €72,735 respectively in 2017.

The Chemicals sector had the highest average payroll per capita of all sectors in 2017 at €91,079, followed by Food and Drink with €81,700 and Information, Computer and Computer Services with €77,400.

Definition - Payroll

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

3.9 Materials & Services Purchased by Foreign-Owned Companies, 2017

	Materials Purchased 2017			Services Purchased 2017		
	Total Materials	Irish Materials	Irish as % of Total	Total Services	Irish Services	Irish as % of Total
	€m	€m	%	€m	€m	%
Total - All Sectors	26,143	3,314	12.7%	112,216	5,747	5.1%
Manufacturing & Other Industry	18,307	2,785	15.2%	25,613	2,672	10.4%
Food & Drink	1,698	778	45.8%	2,407	663	27.5%
Traditional Manufacturing	3,616	555	15.4%	745	351	47.1%
Chemicals	7,678	507	6.6%	17,079	922	5.4%
Computer/Electronic/Optical Prod.	2,796	251	9.0%	2,522	274	10.9%
Medical Devices	2,503	694	27.7%	2,819	457	16.2%
Infor./Comm. & Other Services	7,835	529	6.7%	86,603	3,075	3.6%
Information, Comm. & Computer	7,506	497	6.6%	84,065	2,584	3.1%
Business/Financial & Other Services	329	32	9.8%	2,538	491	19.4%

In overall terms, foreign-owned industry spent €26.1 billion on materials, of which €3.3 billion or 12.7% relates to materials sourced in Ireland (either by indigenous suppliers or other foreign-owned multinationals in the country).

- The largest proportion of Irish-sourced materials is found in the Food & Drink sector where 45.8% of all materials purchased were sourced in Ireland. In monetary terms, this amounted to €778 million spent in Ireland in 2017.
- The Medical Devices sector sourced 27.7% of their materials in Ireland.

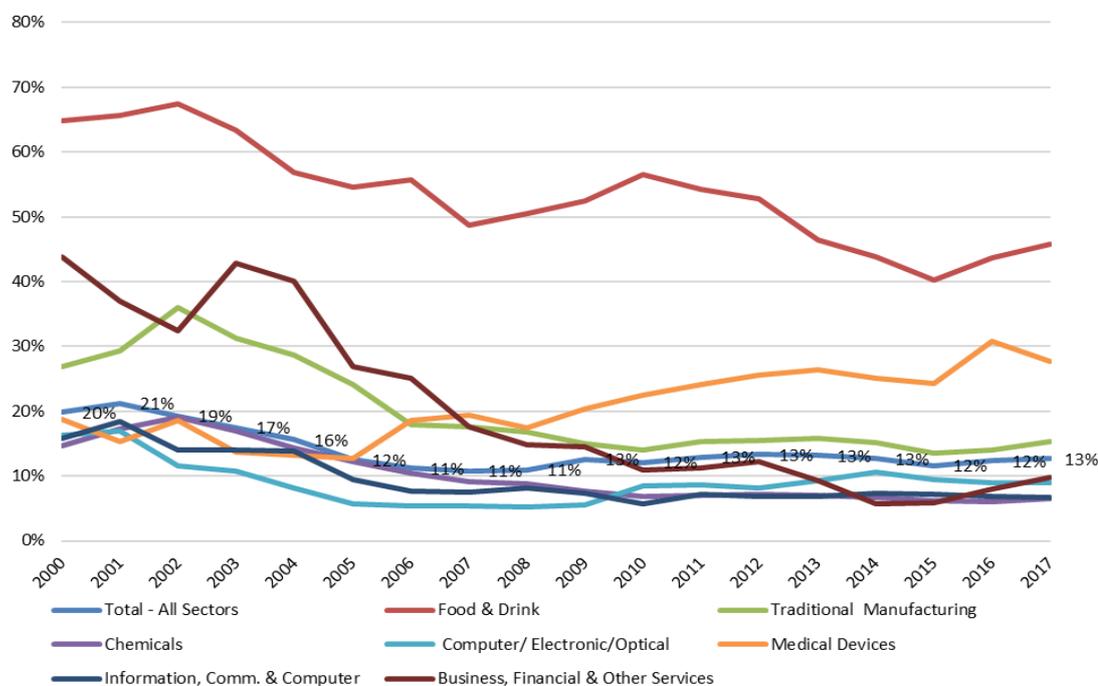
Foreign-owned industries spend, on services sourced in Ireland, amounted to €5.7 billion in 2017 or 5.1% of total services. The total spend on services amounted to €112.2 billion - it should be noted that this figure includes royalty payments.

- The services sector with the highest spend on Irish services was the Information, Communication and Computer sector which spent €2.6 billion or 3.1% of a total spend of €84.1 billion on services in 2017.
- Traditional Manufacturing had the highest proportion on Irish-sourced services at 47.1% 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, 2000-2017



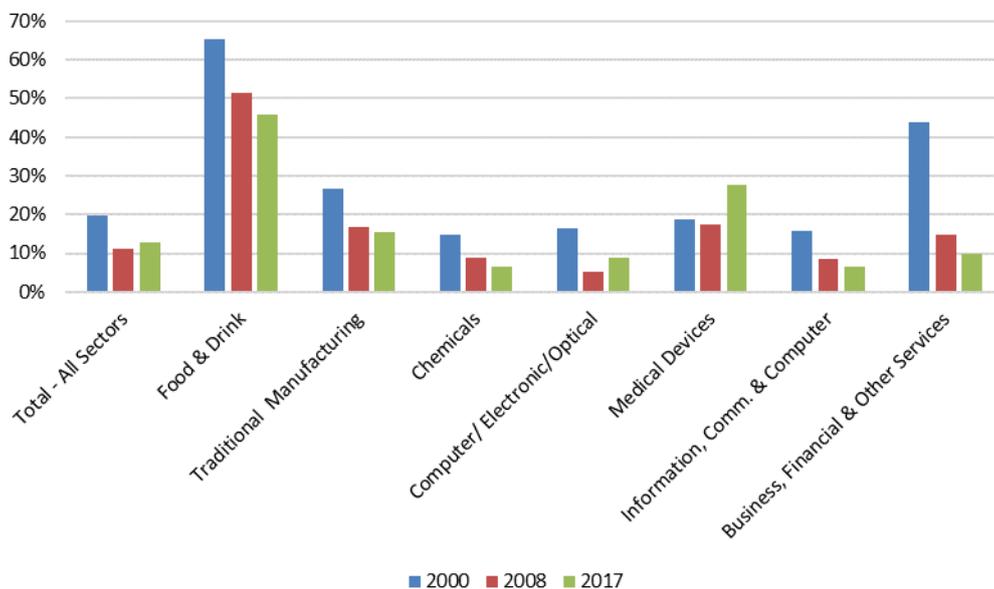
This graph depicts trends in the share of materials purchased by foreign-owned companies that were sourced in Ireland. The trend in the share of materials purchased in Ireland was in decline for all sectors between 2000 and 2006. The percentage of materials purchased in Ireland was at its lowest level in 2006 and 2007 at 11% and stands at 13% in 2017.

The sector with the largest share of materials purchased in Ireland is the Food & Drink sector with 46%, though this share has dropped from 50% in 2008 and 65% in 2000. (Absolute value €778m).

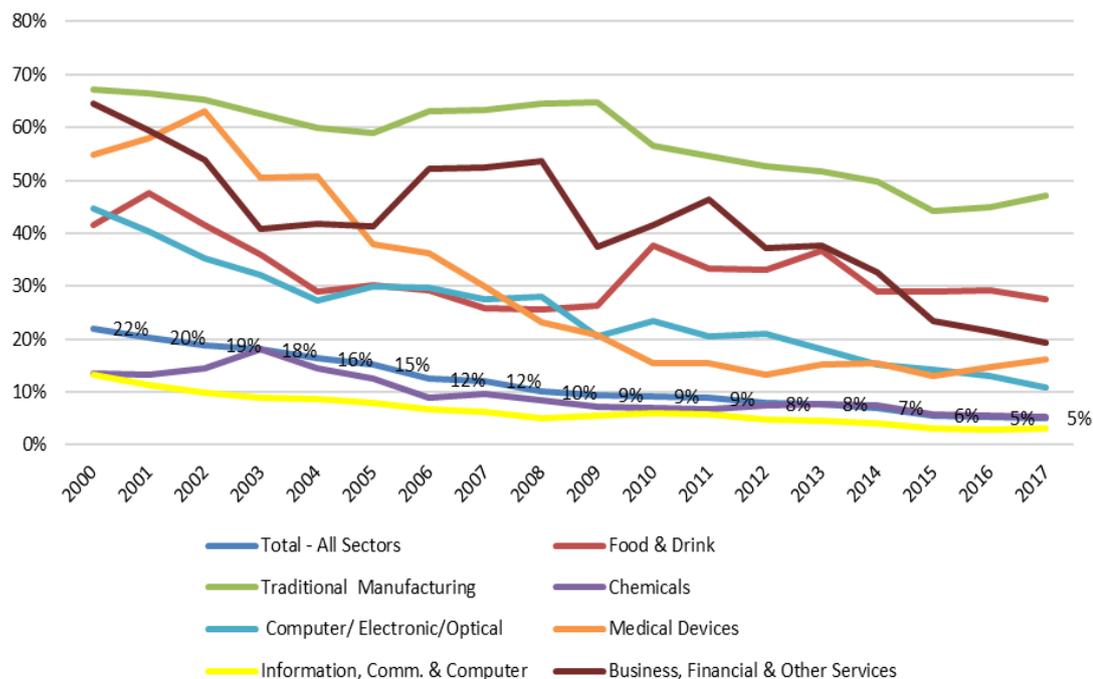
The Traditional Manufacturing sector’s share of Irish materials has decreased steadily over the period of this time-series from 27% in 2000 to 15% in 2017. (Absolute value €556m).

The one sector that has increased its share of Irish materials between 2000 and 2017 is the Medical Devices sector going from 19% to 28% (Absolute value was €694m).

Irish-Sourced Materials as a Share of All Materials Purchased by Foreign-Owned Client Companies



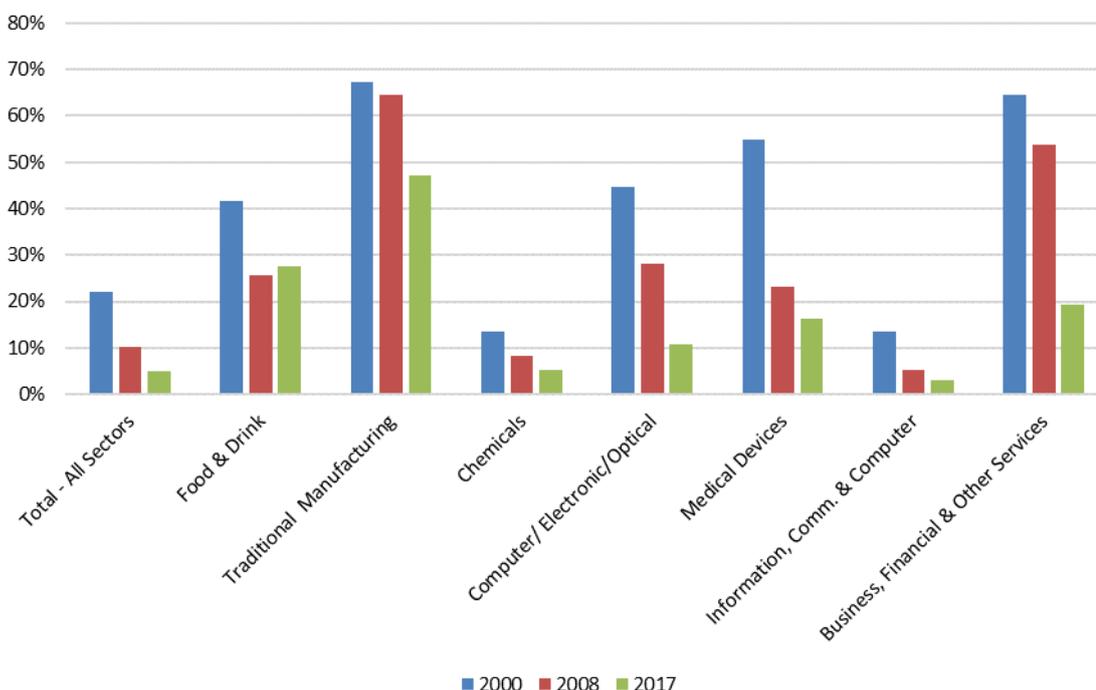
3.11 Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000-2017



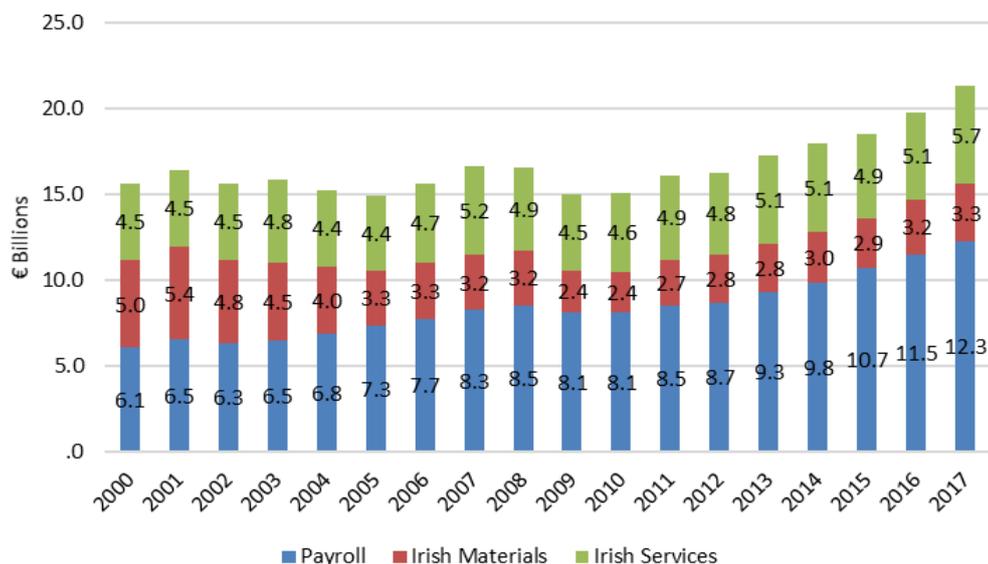
This graph shows the share of total services sourced in Ireland by foreign-owned Manufacturing and Services firms. In 2000, 22% of all services purchased by foreign-owned firms were sourced in Ireland - this figure has declined to 5% in 2017.

- Traditional Manufacturing dropped its share of Irish service purchases from 67% in 2000 to 47% in 2017 but remains the highest performing sector as regards Irish-sourced services. (Absolute value was €352 million).
- The Medical Devices sector's share of services sourced in Ireland dropped from 55% in 2000 to 16% in 2017. (Absolute value was €457 million).
- The Computer, Electronic and Optical Products sector has also decreased its share of Irish services purchases from 45% in 2000 to 11% in 2017. (Absolute value €274 million).
- The Information, Communications and Computer Services sector's share of service purchases sourced in Ireland fell from 13% in 2000 to 3% in 2017. (Absolute value €2.6 billion).
- The only sector to increase its share of Irish sourced services since 2008 was the Food & Drink sector which moved from 26% in 2008 to 28% in 2017 though this is a decline on the 2000 figure of 41%.
- The percentage of Irish services purchased by the Chemical sector dropped from 14% in 2000 to 5% in 2017. (Absolute value €922 million).

Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000, 2008, 2017



3.12 Total Direct Expenditure in the Irish Economy by Foreign-Owned Companies, 2000-2017



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 €21.3 billion in 2017, comprising €12.3 billion on payroll, €3.3 billion on materials produced in Ireland and €5.7 billion on services purchased in Ireland.

- Direct expenditure by foreign-owned firms was up 7.7% in 2017 from €19.8 billion in 2016.
- Direct expenditure has increased from €15.7 billion in 2000 and shows an overall nominal increase of 1.8% per annum between 2000 and 2017.
- Over the period 2000 to 2017:
 - Payroll has increased by 4.2% per annum;
 - Expenditure on materials sourced in Ireland has decreased by 2.4% per annum;
 - Expenditure on services sourced in Ireland has increased by 1.4% per annum.

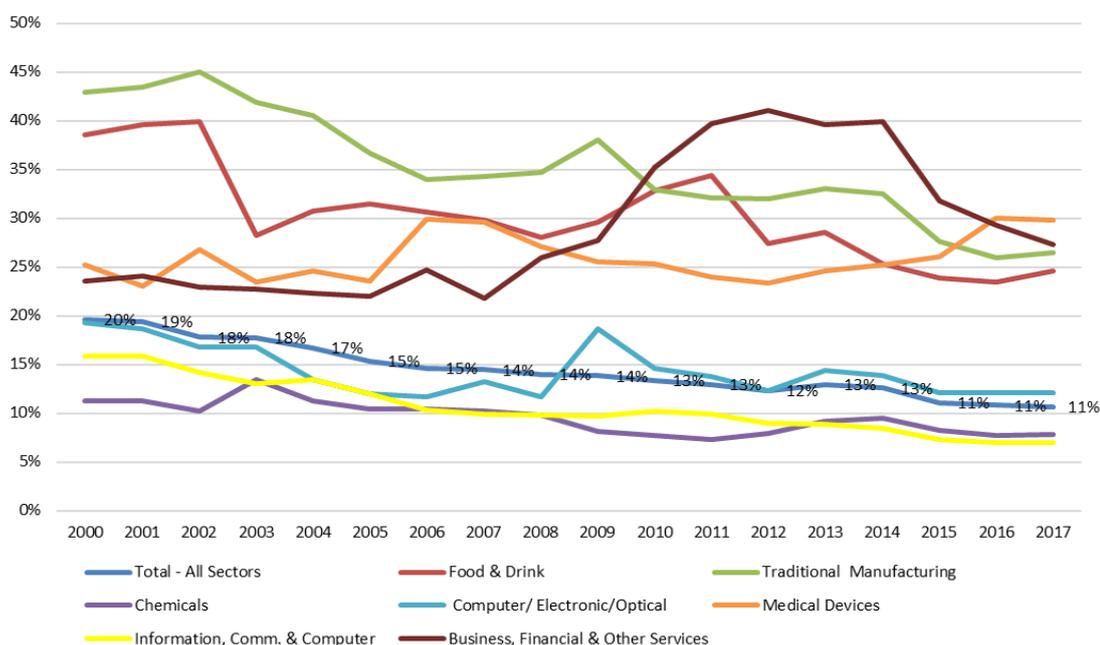
The composition of direct expenditure by foreign companies has also changed since 2000:

- In 2000 payroll made up 39%, Irish materials 32% and Irish services 29% of total Irish economy expenditure;
- In 2017, payroll accounts for 58% of total expenditure in the Irish economy, with Irish materials and Irish services accounting for 16% and 27% 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, 2000-2017



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 2000-2017.

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 11% in 2017.

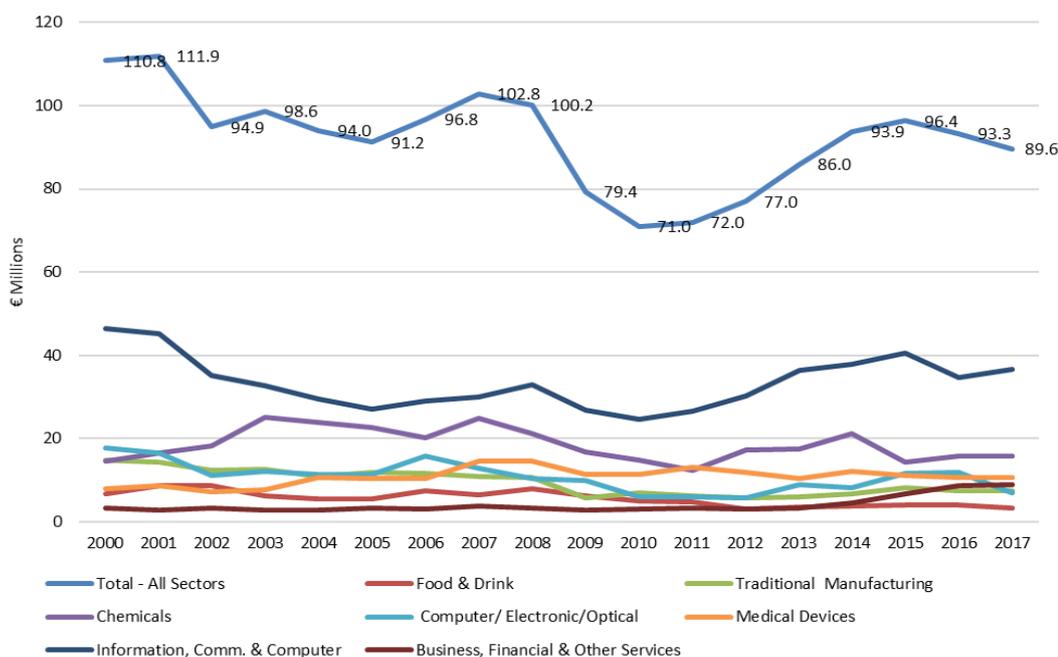
Only one sector has gone against this aggregate trend - Business, Financial and Other Services sector has increased its percentage from 24% in 2000 to 27% in 2017 (Value €1,892m).

The Information, Communication and Computer Services Sector decreased its Direct Expenditure as a percentage of sales from 16% in 2000 to 7% in 2017. In absolute terms this is the sector with the greatest direct expenditure in the Irish economy with a spend of €7.9 billion in 2017 accounting for 37% of total direct expenditure by foreign firms in the economy in 2017.

The next highest contributor in absolute terms is the Chemicals sector with a total expenditure of €3.3 billion in 2017. This represents 8% of sales in that sector in 2017 and is only slightly lower than 2000 when direct expenditure stood at 11% of sales.

Direct Expenditure in Traditional Manufacturing has fallen from 43% in 2000 to 27% in 2017. In absolute terms total expenditure stood at €1.8 billion in 2017.

3.14 Formal Structured Training in Foreign-owned Companies, 2000-2017



Total expenditure on structured, formal training in foreign-owned companies in 2017 amounted to €89.6 million. Expenditure on training increased between 2010 and 2015 from a low of €71.0 million in 2010 to reach €96.4 million in 2015. It has since decreased again to €89.6m in 2017.

Spending on training has not recovered to the rates reported in the early years of this survey when total funding for training reached €111.9 million in 2001.

- The Manufacturing sectors spent €44.1 million or 54% of total expenditure on structured training in foreign-owned companies, broadly equivalent to its share of payroll expenditure of 48.9%.
 - Within Manufacturing, the chemicals sector is responsible for 35.9% of this expenditure in 2017 at €15.9 million.
- The Services sectors spend on training in 2017 was €45.5 million.
 - The Computer Programming sector spends most on training within Services with €36.7 million in 2017 or 80.7% of total services spend in that year.
- Overall expenditure on training per person employed in foreign-owned companies declined from €595k in 2016 to €542k in 2017.

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.2⁹. (Nomenclature statistique des Activités économiques dans la Communauté Européenne)

To highlight broad trends in the report, sectors have been amalgamated into smaller groups¹⁰.

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

Manufacturing and Other Industry

Food/Drink & Primary Production:

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

Traditional Manufacturing:

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

Modern Manufacturing:

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

Energy, Water, Waste & Construction

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

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

Information, Communication & Computer:

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

Business, Financial & Other Services:

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

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

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

⁹ NACE Rev 2 – For more detail on NACE codes go to the Central Statistics Office web-site:

¹⁰ 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 2010¹¹.

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

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

¹¹ <http://www.irishstatutebook.ie/eli/2010/si/81/made/en/print>

Appendix 3: Sample Questionnaires

Enterprise Ireland Questionnaire

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

Company name:

Annual Business Report 17/18

Company address:

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



Ref no:

Please return a completed form via e-mail to abr@insightsc.ie or by post to: Annual Business Survey Unit, Strategic Policy Division, Department of Business, Enterprise & Innovation, 23 Kildare St, Dublin 2, D02 TD30



An Roinn Gré, Fiontar agus Nuálaíocht
Departments of Business, Enterprise and Innovation

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

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

SALES AND EXPORTS	
-------------------	--

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

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

	Actual 2016 (€000's)	Actual 2017 (€000's)	Forecast 2018 (€000's)
DOMESTIC SALES			
Q1a1 - MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2 - SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

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

	Actual 2016 (€000's)	Actual 2017 (€000's)	Forecast 2018 (€000's)
EXPORT SALES			
Q1b1 - MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1b2 - SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

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

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

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

SALES TO PUBLIC SECTOR			
Q1d1 - DOMESTIC SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales in Q1a attributed to the public sector.			
Q1d2 - EXPORT SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of export sales in Q1b attributed to the public sector.			

DOMESTIC SALES TO FOREIGN OWNED COMPANIES BASED IN IRELAND			
Q1e1 - MANUFACTURED GOODS	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales in Q1a1 made to foreign owned companies based in Ireland.			
Q1e2 - SERVICES	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales in Q1a2 made to foreign owned companies based in 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

Q1f2 - GLOBAL SALES € € €
If Yes to Q1f1 above, please indicate the value of total group sales (inclusive of total sales given in Q1c).

Q1f3 - INTER-COMPANY SALES % % %
If Yes to Q1f1, please state the proportion (best estimate) of the total turnover in Q1c above invoiced to other affiliates or business units of your parent company.

Q1g - DISTRIBUTION SALES € € €
In addition to the sales of goods and services produced by your own enterprise (i.e. Q1c) please record the value of goods resold without further processing (i.e. distribution sales or sales of other companies' products).

Q1h - NEW PRODUCT SALES PERCENTAGE (%) %
What proportion of the value of sales in 2017 was accounted for by products which were introduced by the company over the last 3 years, i.e. by products which were substantially different to those previously supplied by your company?

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

EXPORT MARKETS

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

Q2b - Please provide a breakdown of your exports in 2016, 2017 and your forecasted exports 2018. Please note that the total of these figures should be the same as those outlined in Q1b.

	Actual 2016 (€000's)	Actual 2017 (€000's)	Forecast 2018 (€000's)		Actual 2016 (€000's)	Actual 2017 (€000's)	Forecast 2018 (€000's)
England & Wales				Bahrain			
Northern Ireland				Egypt			
Scotland				Ghana			
UK				Israel			
				Jordan			
Austria				Kenya			
Belgium/Luxembourg				Kuwait			
Bulgaria				Libya			
Croatia				Morocco			
Cyprus				Nigeria			
Czech Republic				Oman			
Denmark				Qatar			
Estonia				Saudi Arabia			
Finland				South Africa			
France				Tunisia			
Germany				UAE			
Greece				M. EAST & AFRICA			
Hungary							
Iceland				Afghanistan			
Italy				Australia			
Latvia				Bangladesh			
Lithuania				China			
Malta				Hong Kong			
Netherlands				India			
Norway				Indonesia			
Poland				Iran			
Portugal				Japan			
Romania				Malaysia			
Russia				Myanmar			
Slovakia				New Zealand			
Slovenia				Pakistan			
Spain				Philippines			
Sweden				Singapore			
Switzerland				South Korea			
Turkey				Taiwan			
Ukraine				Thailand			
EUROPE				Vietnam			
				ASIA			
Argentina				Other Markets - use separate sheet if necessary			
Brazil							
Canada							
Chile							
Colombia							
Mexico							
Peru							
Uruguay							
USA							
Venezuela							
AMERICAS				OTHER MARKETS			
				TOTAL MARKETS			

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

1) 2) 3)

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

Q2d - Please list the markets where you had a physical presence in 2017 (i.e. an office or staff permanently located there)

--

EMPLOYMENT

Q3a - COMPANY STAFF

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

	Actual 2016	Actual 2017	Forecast 2018
Full-Time: <i>Employed on a full-time basis for at least nine months with the exception of agency workers (see Q3b)</i>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
Other: <i>All other employees with the exception of agency workers (see Q3b), can be part-time, short-term, temporary or other.</i>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
TOTAL COMPANY STAFF	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" 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 2016	Actual 2017	Forecast 2018
Full-Time: <i>Employed on a full-time basis for at least nine months</i>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
Other: <i>All other classification of agency worker, can be part-time, short-term, temporary or other.</i>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>
TOTAL AGENCY STAFF	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" 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 2016	Actual 2017	Forecast 2018
Full-Time Employees Only:	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>	<input style="width: 80%;" type="text"/>

EXPENDITURE ITEMS

	Actual 2016 (€000's)	Actual 2017 (€000's)
Q4 - PAYROLL	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>

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].

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

Q5a - MATERIALS	€ <input style="width: 80%;" type="text"/>	€ <input style="width: 80%;" type="text"/>
------------------------	--	--

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

Q5b - MATERIALS SOURCED IN IRELAND (%)	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
---	--	--

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

Q5c - MATERIALS SOURCED FROM AFFILIATES (%)	<input style="width: 80%;" type="text"/> %	<input style="width: 80%;" type="text"/> %
--	--	--

If Yes to Q1f1, please estimate the proportion of materials and components in Q5a sourced from other affiliates or business units of your parent company.

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

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).

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

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

CORPORATION TAX

Q10 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2016-2019?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2016 (actual)			
2017 (estimate)			
2018 (forecast)			
2019 (forecast)			

TRAINING

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

Q11 - TRAINING € **Actual 2016 (€000's)** € **Actual 2017 (€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).

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

RESEARCH, DEVELOPMENT & INNOVATION

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

	Actual 2016	Actual 2017
Q12a - IN-HOUSE RD&I (NUMBER EMPLOYED)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

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

	(€000's)	(€000's)
Q12b - RD&I EXPENDITURE (IN-HOUSE)	€ <input style="width: 100%;" type="text"/>	€ <input style="width: 100%;" 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.

	€ <input style="width: 100%;" type="text"/>	€ <input style="width: 100%;" type="text"/>
--	---	---

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

	€ <input style="width: 100%;" type="text"/>	€ <input style="width: 100%;" type="text"/>
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Please combine Q12b and Q12c

	<input style="width: 100%;" type="text"/> %	<input style="width: 100%;" type="text"/> %
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Q12e - PERCENTAGE OF GLOBAL RD&I

If Yes to Q1f1, what proportion (%) of your global RD&I expenditure does your RD&I expenditure from Ireland (as outlined in Q12d above) represent?

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:

	2015	2016	2017
Yes	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
No	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>

Q12g - INTELLECTUAL PROPERTY

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

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

Q12h - IRISH KNOWLEDGE DEVELOPMENT BOX

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

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

Q12i1 - Relationship with Higher Education: Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2017?

- Yes
- No
- Don't Know

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

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

RESEARCH PRIORITISATION

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

- 1 - No relevance,
- 2 - Directly relevant to my business,
- 3 - Relevant to my business and actively **engaged in research** in the area.

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

Further Information on the Priority Areas is available at <http://insightsc.ie/download/1862/>

IMPACT OF BREXIT

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

Q14a - BREXIT IMPACT

On a scale where 1=Reduction, 2=No change, 3=Increase and 4=Don't know, how is Brexit likely to impact on your business in 2018, in terms of:

	1	2	3	4	
a-					Profitability
b-					Revenue
c-					Ability and appetite to invest
d-					Employment
e-					Supply chain
f-					Other, please specify: <input style="width: 200px; height: 30px;" type="text"/>

Q14b - BREXIT ACTION PLAN

What actions do you plan to take in 2018 to address anticipated Brexit related risks and opportunities (tick all that apply)

a-	<input type="checkbox"/>	Geographical market diversification
b-	<input type="checkbox"/>	Strengthen business in the UK
c-	<input type="checkbox"/>	Improve operational competitiveness
d-	<input type="checkbox"/>	Invest in R&D
e-	<input type="checkbox"/>	Improve financial management
f-	<input type="checkbox"/>	Develop strategic partnerships
g-	<input type="checkbox"/>	Scenario planning in relation to additional cost and resource implications, e.g. tariffs
h-	<input type="checkbox"/>	Do nothing
i-	<input type="checkbox"/>	Other, please specify: <input style="width: 200px; height: 30px;" type="text"/>

IDA Ireland Questionnaire

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

Company name:

Annual Business Report 17/18

Company address:

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



An Roinn Gnó, Fiontar agus Malairíochta
Department of Business, Enterprise and Innovation

Ref no:

Please return a completed form via e-mail to abr@insightsc.ie or by post to: Annual Business Survey Unit, Strategic Policy Division, Department of Business Enterprise & Innovation, 23 Kildare St, Dublin 2, D02 TD30

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

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

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

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

	Actual 2016 (€000's)	Actual 2017 (€000's)	Forecast 2018 (€000's)
EXPORT SALES			
Q1a1) MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2) SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

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

DOMESTIC SALES

Q1b1) MANUFACTURED GOODS	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1b2) SERVICES	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1c) TOTAL SALES i.e. (Q1a + Q1b)	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

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

SALES TO PUBLIC SECTOR

Q1d1) EXPORT SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of export sales in Q1a attributed to the public sector.			
Q1d2) DOMESTIC SALES TO PUBLIC SECTOR	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Estimated percentage of domestic sales in Q1b attributed to the public sector.			

Q1e - INTER-COMPANY SALES	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
Of the total turnover in Q1c above, please state the proportion (best estimate) invoiced to other affiliates or business units of your parent company.			

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

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

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

EXPORT MARKETS

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

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

	2016		2017	
	Goods	Services	Goods	Services
United Kingdom (inc. Northern Ireland)	%	%	%	%
Other EU Countries*	%	%	%	%
Other European Countries	%	%	%	%
North America, i.e. USA and Canada	%	%	%	%
Asia	%	%	%	%
Elsewhere	%	%	%	%
Total	100%	100%	100%	100%

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

EMPLOYMENT

Q3a - COMPANY STAFF

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

	Actual 2016	Actual 2017	Forecast 2018
Full-Time: <i>Employed on a full-time basis (or on a contract of at least nine months) with the exception of agency workers.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: <i>All other employees with the exception of agency workers, can be part-time, short-term, temporary or other.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL COMPANY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>
% Company Staff Earning €40,000+ per annum	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %

Q3b - AGENCY STAFF

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

	Actual 2016	Actual 2017	Forecast 2018
Full-Time: <i>Employed as an agency worker on a full-time basis (or on a contract of at least nine months).</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other: <i>All other classification of agency worker, can be part-time, short-term, temporary or other.</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL AGENCY STAFF	<input type="text"/>	<input type="text"/>	<input type="text"/>
Q3c - GLOBAL EMPLOYMENT	<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.

CURRENT EXPENDITURE

	Actual 2016 (€000's)	Actual 2017 (€000's)
Q4 - PAYROLL	€ <input type="text"/>	€ <input type="text"/>
<i>Wages, salaries, pensions and other payroll costs for employees within the Republic of Ireland [include all bonuses, PRSI, other taxes and levies but exclude redundancy payments and agency staff payroll costs].</i>		
Please record costs associated with total sales excluding cost of distribution sales (Q1f) .		
Q5a - MATERIALS	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of materials and components used directly in the production of goods and services [exclude goods purchased for re-distribution only or any capital expenditure].</i>		
Q5b - MATERIALS SOURCED IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of materials and components in Q5a produced in Republic of Ireland.</i>		
Q6a - SERVICES not including Royalties	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all bought-in services, e.g. agency fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services, professional fees etc.</i>		
Q6b - SERVICES SOURCED IN IRELAND not including Royalties (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of services in Q6a sourced in Republic of Ireland.</i>		
Q6c - ENERGY	€ <input type="text"/>	€ <input type="text"/>
<i>Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.</i>		
Q7a - ROYALTIES not to be included in Q6a-Services above	€ <input type="text"/>	€ <input type="text"/>
<i>Estimated value of royalty payments, i.e. include international payments of franchising fees and the royalties paid for the use of registered trademarks, use of intangible, non-produced, non-financial assets and proprietary rights (such as patents, copyrights and industrial processes and designs) and with the use, through licensing agreements, of produced originals or prototypes (such as manuscripts, and cinematographic works and sound recordings).</i>		
Q7b - ROYALTIES PAID IN IRELAND (%)	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of royalties in Q7a paid to companies located in Republic of Ireland (whether inter-company or otherwise)</i>		
Q8 - ALL OTHER EXPENSE ITEMS	€ <input type="text"/>	€ <input type="text"/>
<i>Sum of all other expense items appearing in Profit and Loss Account of your Republic of Ireland operation (e.g. rent, leasing costs, interest payments, depreciation and foreign exchange costs etc.).</i>		

TRAINING

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

	Actual 2016	Actual 2017
Q9 - TRAINING	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all formal structured training, in-house and external (excluding salary of those being trained, on-the-job training costs and apprentice training).</i>		

CAPITAL EXPENDITURE

	Actual 2016 (€000's)	Actual 2017 (€000's)
Q10 - CAPITAL EXPENDITURE	€ <input type="text"/>	€ <input type="text"/>
<i>Please outline the cost of any expenditure on fixed assets (i.e. assets with a useful life extending beyond the taxable year) associated with the companies operation in the Republic of Ireland. You should include in the appropriate category leased items of fixed capital where the lease is on a financial basis, exclude operational leases.</i>		

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

	2016	2017
Building & Structures	%	%
Machinery & Equipment	%	%
Other	%	%
Total	100%	100%

CORPORATION TAX

Q11 - Corporation Tax

Did (or will) your company pay Corporation Tax in Ireland from 2016-2019?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2016 (actual)			
2017 (estimate)			
2018 (forecast)			
2019 (forecast)			

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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 (<http://www.insightsc.ie/download/1865>).

Q12a - IN-HOUSE RD&I EMPLOYMENT

Q12a1 - RESEARCHERS/TECHNICIANS

**Actual
2016**

**Actual
2017**

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

Q12a2 - SUPPORT STAFF

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

Q12b - RD&I EXPENDITURE (IN-HOUSE)

(€000's)	(€000's)
€ <input style="width: 100px;" type="text"/>	€ <input style="width: 100px;" 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: 100px;" type="text"/>	€ <input style="width: 100px;" type="text"/>
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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: 100px;" type="text"/>	€ <input style="width: 100px;" type="text"/>
--	--

Please estimate the total expenditure on RD&I, i.e. Q12b plus Q12c

Q12e - PERCENTAGE OF GLOBAL RD&I

<input style="width: 100px;" type="text"/> %	<input style="width: 100px;" 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 Q1e, 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:

	2015	2016	2017
Yes			
No			

Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX

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

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

	Have applied
	Will apply
	Not relevant to my business

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

Q12h - INTELLECTUAL PROPERTY

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

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

Q12i1 - RELATIONSHIP WITH HIGHER EDUCATION:

Did you have an established working relationship with a higher education institution (or institutions) for RD&I undertaken in 2017?

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

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

RESEARCH PRIORITISATION

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

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

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

Further Information on the Priority Areas is available here (<http://www.insightsc.ie/download/1862.pdf>)

IMPACT OF BREXIT

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

Q14a - CURRENT BREXIT IMPACT

On a scale where 1=Reduction, 2=No change, 3=Increase and 4=Don't know, how is Brexit likely to impact on your business in 2018, in terms of:

	1	2	3	4	
a-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mandate in Ireland
b-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Revenue
c-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ability and appetite to invest
d-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employment
e-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Competitiveness of Irish Operation
f-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other, please specify: <input style="width: 150px;" type="text"/>

