



Rialtas na hÉireann  
Government of Ireland

# Annual Business Survey of Economic Impact (ABSEI) 2020

Prepared by the Department of Enterprise, Trade and Employment

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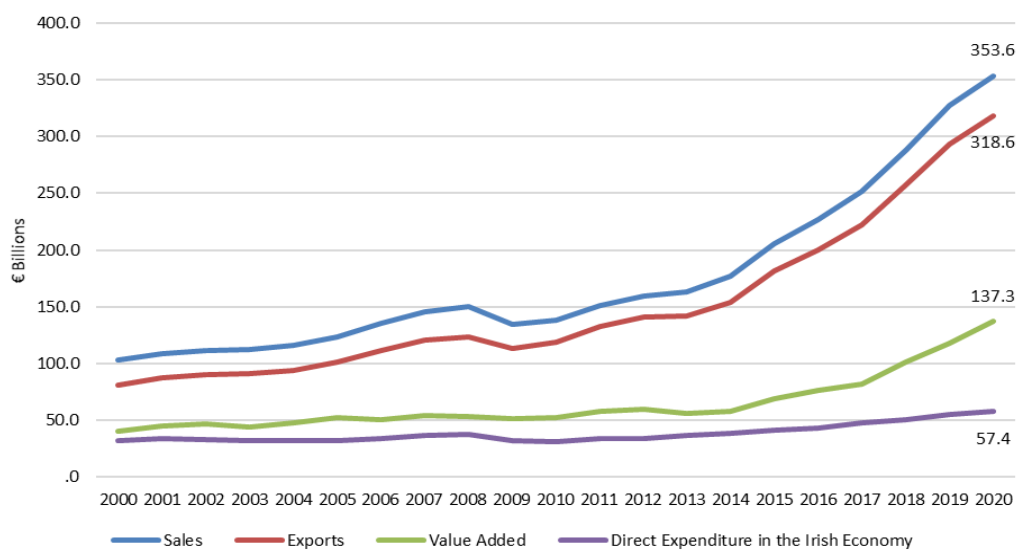
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## Executive Summary

The Annual Business Survey of Economic Impact is a survey of approximately 4,200 client companies of Enterprise Ireland, IDA Ireland and Údarás na Gaeltachta employing ten or more employees in Ireland<sup>1</sup> and comprises the Manufacturing and Information, Communication and Other Internationally Traded Services sectors (see Appendix 2). All data is in current prices.

### E.1 Key Business Indicators for all Agency Client Companies (current prices), 2000-2020



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 2020.

Agency client companies reported a rise in sales and exports in 2020 over the previous year. This continues a substantial upward trend in results following the downturn in the economy in 2009.

- Total sales amounted to €353.6 billion in 2020 which represents an increase of 8.0% in current prices on the previous year's figure of €327.3 billion.
- Total exports in 2020 amounted to €318.6 billion, an increase of 8.6% on the previous year of €293.3 billion.
- Value added (sales less materials and services costs) has also increased over this time-series and in 2020 amounted to €137.3 billion, up 16.8% on the previous year with 87.8% of this value being generated in foreign owned firms.

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

- Direct Expenditure in the Irish Economy (Payroll, Irish Materials, Irish Services) has increased over 2019 by 4.5% to €57.4 billion in 2020.

**E.2 Summary Table of Key Business Indicators (current prices), 2020**

	2020 (€bn)			Share of Total 2020		
	Foreign-owned	Irish-Owned	All	Foreign-owned	Irish-Owned	All
Sales	306.7	46.9	353.6	86.7%	13.3%	100%
Exports	294.5	26.6	321.0	91.7%	8.3%	100%
Value Added	120.6	16.7	137.3	87.8%	12.2%	100%
Direct Expenditure	29.8	27.6	57.4	52.0%	48.0%	100%

Note: Rounding may affect totals

This table shows sales, exports, value added and direct expenditure for 2020 by ownership.

- Total sales for agency-assisted companies in 2020 amounted to €353.6 billion.
  - Foreign-owned companies account for €306.7 billion, an increase of 9.9% over the previous year. This represents 86.7% of total sales by Agency clients in 2020.
  - Sales for Irish-owned firms increased by 6.3% between 2019 and 2020, amounting to €46.9 billion or 13.3% of total sales.
- Total exports for agency clients amounted to €321.0 billion in 2020, a 10.4% increase over 2019 exports, with €294.5 billion exports by Foreign-owned companies and €26.6 billion exports by Irish-owned companies in 2020.
- Value added was €120.6 billion in 2020 with 87.8% of this value being generated in foreign owned firms.
- Irish owned client companies have €27.6 billion of direct expenditure in the Irish economy compared with €29.8 billion for foreign owned companies.

**E.3 Export Intensity of Irish and Foreign-owned Companies, 2000-2020**

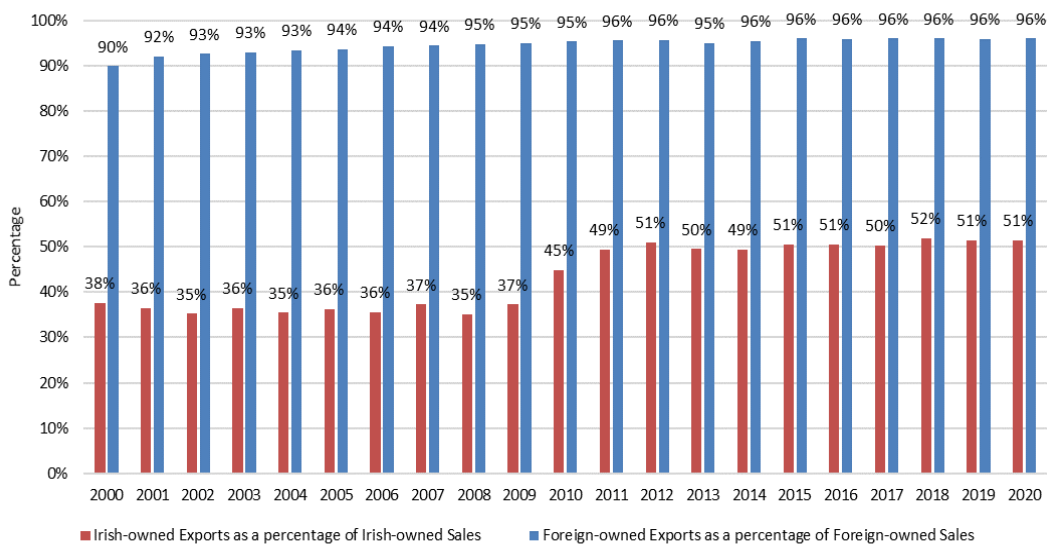
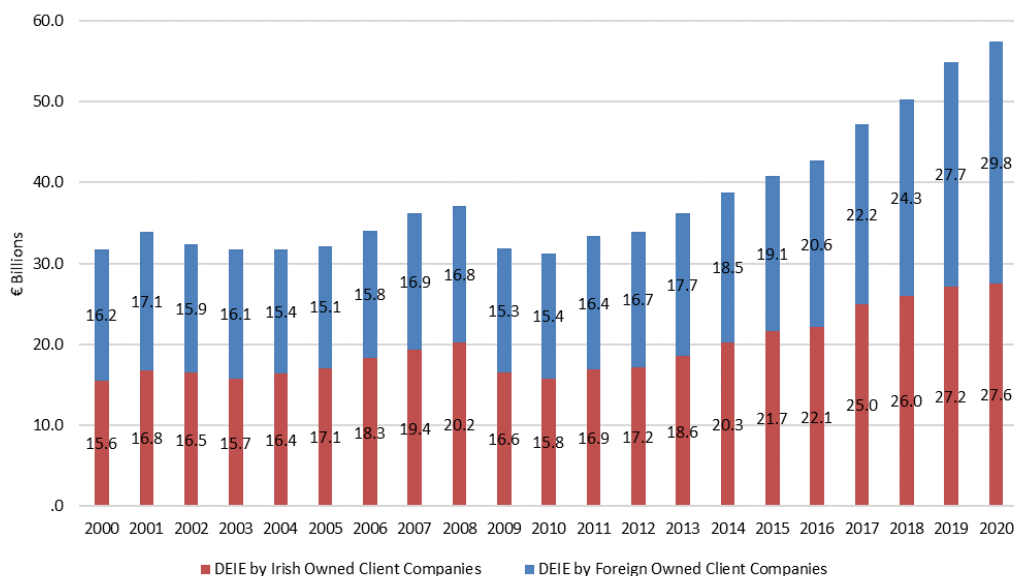


Figure E.3 above illustrates the export intensity (exports as a percentage of total sales) of Irish-owned and Foreign-owned firms over the period 2000 to 2020.

- Irish-owned firms have increased their export intensity from 38% in 2000 to 51% intensity in 2020.
- The vast majority of products and services produced by foreign-owned firms are destined for export, with an export intensity of 96% in 2020, at this constant level since 2014.

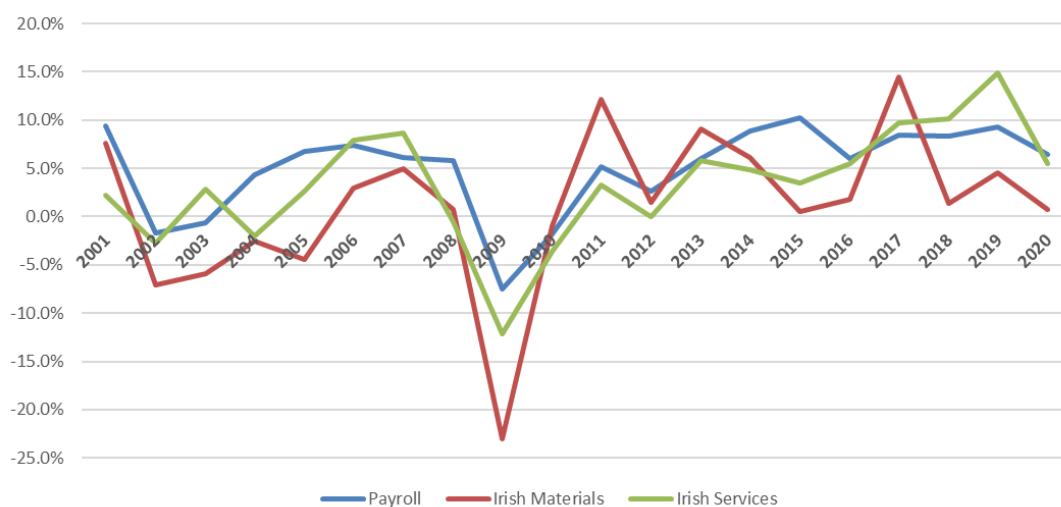
**E.4 Direct Expenditure in the Irish Economy (DEIE) by Ownership, 2000-2020**



In 2020, Direct Expenditure in the Irish Economy (DEIE) by agency-assisted firms amounted to €57.4 billion and is the highest level of direct expenditure in the twenty-one years of this time-series.

Irish-owned client companies spent approximately €27.6 billion in the Irish economy in terms of payroll and purchases of Irish materials and Irish services. Foreign owned clients spent €29.8 billion. Direct Expenditure has been increasing each year since 2009.

**E.5 All firms, year-on-year percentage change, Payroll, Irish Materials and Irish Services, 2000-2020**



In 2020, there was an increase in payroll and purchases of Irish materials and services over the 2019 figures. There was an increase in the purchases of Irish materials of 0.7% and Irish services of 5.4% and of payroll payments of 6.4%.

**E.6 Direct Expenditure as Percentage of GNP<sup>2</sup> in Irish/foreign-owned companies, 2000, 2011 and 2020**

	Irish			Foreign		
	2000	2011	2020	2000	2011	2020
<b>All Sectors</b>	16.7%	12.3%	9.8%	17.4%	11.9%	10.6%
<b>Manufacturing &amp; Other Industry</b>	14.8%	10.1%	7.9%	12.3%	7.3%	4.7%
<b>Infor., Comm. &amp; Other Services</b>	1.9%	2.2%	1.9%	5.1%	4.6%	5.9%

<sup>2</sup> Gross National Product (GNP) at current market prices: 2000 = €93.1bn / 2011 = €137.8bn / 2020 = €282.6bn.

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

- In 2020, the Direct Expenditure (payroll and purchases of Irish materials & services) of Irish-owned firms in the Irish economy amounted to 9.8% of Ireland’s Gross National Product (GNP). In 2000, this figure was 16.7% and 12.3% in 2011, as growth in direct expenditure did not keep pace with growth in GNP.
  - Direct Expenditure of the Irish-owned Manufacturing sectors as a percentage of GNP reduced from 14.8% to 10.1% between 2000 and 2011 and decreased in 2020 to 7.9%. The Services sectors has remained static at 1.9% of GNP in both 2000 and 2020.
- Direct Expenditure by foreign–owned firms as a percentage of GNP stands at 10.6% in 2020 down from 17.4% in 2000.
  - Direct Expenditure as a percentage of GNP in the foreign-owned Information, Communication & Internationally-Traded Services sectors was at 5.1% in 2000. In 2011 it decreased to 4.6% before increasing to 5.9% in 2020. The manufacturing sectors have decreased their share from 12.3% in 2000 to 4.7% in 2020.

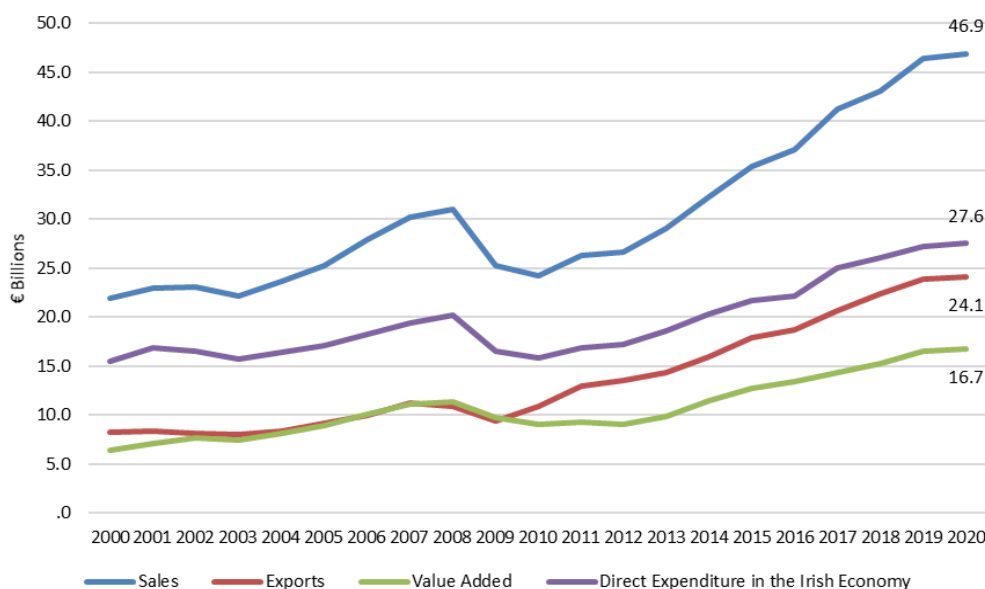
**E.7 Value Added as percentage of GNP in Irish/foreign-owned companies, 2000, 2011 and 2020**

	Irish			Foreign		
	2000	2011	2020	2000	2011	2020
<b>All</b>	6.9%	6.7%	5.9%	36.8%	35.2%	42.7%
<b>Manufacturing &amp; Other Industry</b>	5.0%	3.9%	3.8%	26.1%	24.1%	20.0%
<b>Infor., Comm. &amp; Other Services</b>	1.9%	2.8%	2.2%	10.6%	11.1%	22.7%

- Value added (sales less the cost of materials and services) in Irish owned companies has decreased as a percentage of GNP from 6.9% in 2000 to 5.9% in 2020.
  - While the manufacturing sectors have seen value added decreased between 2000 and 2020 from 5.0% to 3.8%, the services sectors have increased their percentage share of GNP from 1.9% in 2000 to 2.2% in 2020.
- For foreign-owned companies, value added as a percentage of GNP decreased from 36.8% in 2000 to 35.2% in 2011 before increasing to 42.7% in 2020.
  - The Services sectors have increased value added from their 2000 level of 10.6% of GNP to 22.7% of GNP in 2020.
  - The Manufacturing sectors have decreased value added as a percentage of GNP from 26.1% in 2000 to 20.0% in 2020.

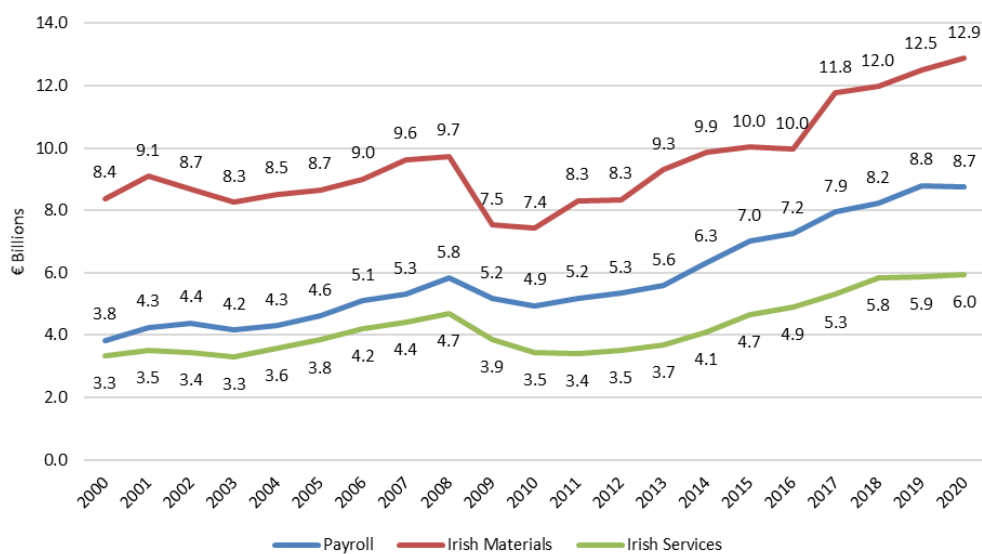


**E.8 Key Business Indicators for Irish-Owned Companies, 2000-2020 (current prices)**



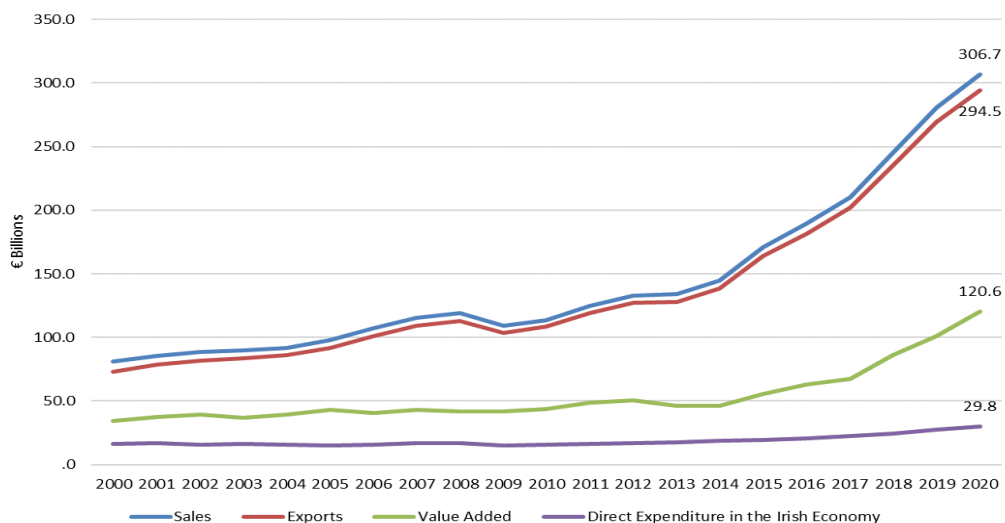
- Sales by Irish owned firms in 2020 showed an increase of 0.9% on the previous year. Total sales stood at €46.9 billion in 2020.
- Exports were also slightly up for Irish firms in 2020 over 2019 with growth of 0.8% and amounted to €24.1 billion in 2020.
- Value-added and direct expenditure have also continued their upward trend with value added at €16.7 billion (up 1.0%) and direct expenditure reaching €27.6 billion (up 1.4%) in 2020.

**E.9 Direct Expenditure in the Irish Economy for Irish-owned client's companies, 2000-2020**



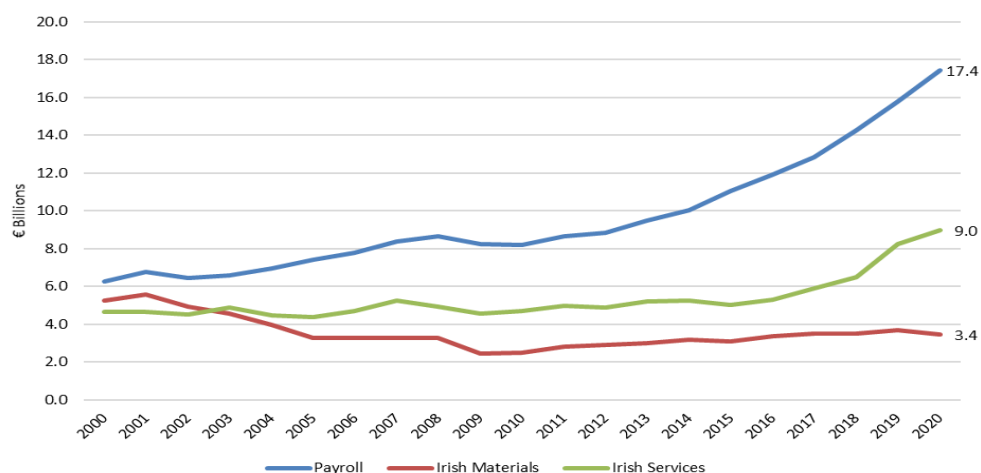
- Irish-owned firms spent €27.5 billion in 2020 in the Irish economy with the largest proportion of this expenditure being on Irish materials. The breakdown of expenditure in 2020 was €8.7 billion on payroll, €12.9 billion on Irish raw materials and €6.0 billion on Irish services.

**E.10 Key Business Indicators for Foreign-Owned Companies, 2000-2020 (current prices)**



- Sales by foreign-owned companies have increased by 9.2% and exports by 9.3% in 2020 over 2019 to €306.7 billion and €294.5 billion respectively. On a per annum basis between 2000 and 2020, sales increased by 6.9% and exports by 7.2%.
- Value added increased by 19.4% between 2019 and 2020 to €120.6 billion.
- Direct expenditure reached €29.8 billion in 2020, a 7.5% increase over the previous year.

**E.11 Direct Expenditure in the Irish Economy by Foreign-owned companies, 2000-2020**



- Foreign firms spend less on Irish materials and more on payroll and Irish services than Irish firms. In 2020, direct expenditure by foreign firms amounted to €29.8 billion, comprising €17.4 billion on payroll, €9.0 billion on services purchased in Ireland and €3.6 billion on materials purchased in Ireland.

## Chapter 1: Introduction

### 1.1 Background

This report presents the findings of the Annual Business Survey of Economic Impact for 2020.

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

The report provides aggregated estimates for all Irish-owned and foreign-owned client firms across a range of variables and provides an overview of the evolution of manufacturing and services sectors for the past twenty years (2000-2020 inclusive). All data is presented in current prices.

### 1.2 Methodology

- The population comprises all agency client firms in manufacturing and services sectors in Ireland with 10 or more employees. A schedule of the services industries that are eligible for assistance under the Industrial Development Acts is listed in Appendix 2. Also included in the population are a small number of High-Potential Start-Up (HPSU) companies where there is an expectation that their employment will exceed 10 in the following surveys.
- Approximately 4,200 client companies in total were surveyed. To allow for non-responses, aggregated results are developed by sector using a combined weighting and imputation system<sup>3</sup>.
- Fieldwork was carried out throughout 2020/2021.
- All figures in this report are in nominal values (current prices).
- Compound Annual Growth Rate (CAGR). Throughout this report the percentage change between 2000-2011 and 2000-2020 is calculated using the compound annual growth rate (CAGR). The CAGR is used to calculate a constant rate of change over the time period.
- Rounding - figures in this report are rounded to assist the reader. While the figures are easier to comprehend, some figure and percentages will not add-up to the total.

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

### Data Revisions

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

### 1.3 Detailed aggregated results, 2000-2020

Aggregated data from the Annual Business Survey is available for the period 2000-2020. These results are available in excel format on the Department of Enterprise, Trade and Employment (DETE) website. To access these excel files please go to publications section on the DETE web-site at:

<https://enterprise.gov.ie/en/Publications/ABSEI-2020.html>

The files contain the following indicators:

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

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

Results are broken down by<sup>4</sup>:

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

All monetary amounts are provided in current prices.

#### 1.4 ISSCOP in ABSEI

As outlined in its Statement of Strategy 2021-2023 document, the Department of Enterprise, Trade and Employment is committed to upholding its values of independence, equality, integrity, and impartiality, and to maintaining the highest standards of professionalism, honesty, objectivity and quality. The Department has signed a statement of commitment<sup>5</sup> to the principles set out in the Irish Statistical System Code of Practice (ISSCOP)<sup>6</sup>. In subscribing to these principles, the Department demonstrates its commitment to improving trust and confidence in the independence, integrity and accountability of the Statistical System and in the credibility and quality of the statistics that we produce and disseminate.

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

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

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

<sup>5</sup> <https://enterprise.gov.ie/en/What-We-Do/The-Business-Environment/Surveys-and-Data/ISSCoP-for-Official-Statistics.pdf>

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

### 1.5 Management and Use of Data

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

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

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

For further information on this survey please contact:

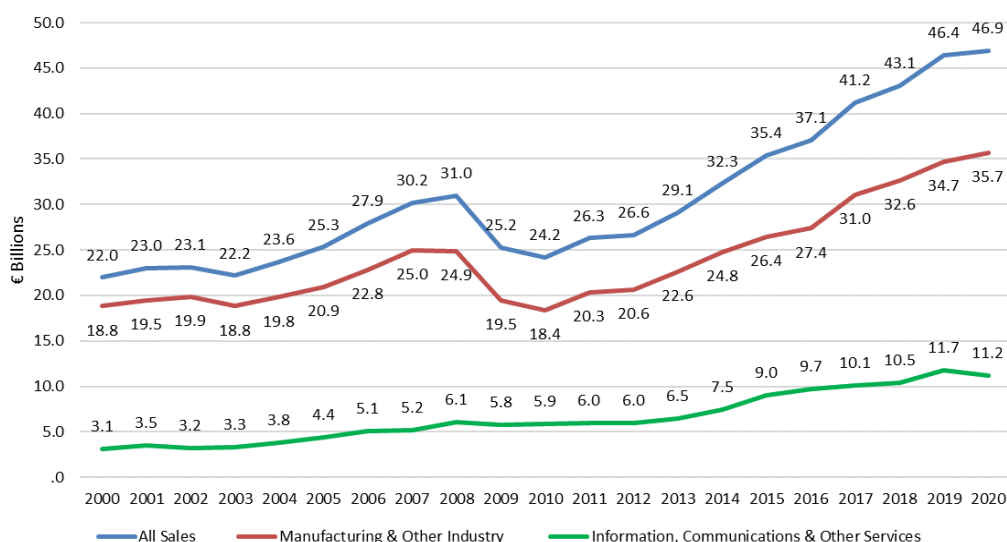
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### Acknowledgement

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

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

### 2.1 Sales - Irish-owned Client Companies, 2000-2020



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

The dark blue line on this graph tracks the growth in the sales up to 2008 and the subsequent decline in sales reaching a low in 2010. In each of the subsequent years, Irish-owned companies have increased their sales:

- Total sales in 2020, stood at €46.9 billion for all manufacturing and services companies and is the highest level of sales recorded over the course of this survey. This represents an 0.9% increase over the 2019 figure of €46.4 billion at current prices.
- In the manufacturing & other Industry sector, sales reached the high points of €25.0 billion in 2007 and 24.9 billion in 2008 but then dropped significantly in 2009 to €19.5 billion and to €18.4 billion in 2010. Sales in manufacturing companies have recovered in each of the past ten years and in 2020 sales amounted to €35.7 billion at current prices, their highest ever level.
- Sales in the services sectors returned a decrease of 4.9% in 2020 when compared to 2019. In 2020 sales in the service sectors amounted to 11.2 billion.

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

	2000	2011	2019	2020	Per Annum Change 2000-20	Per Annum Change 2011-20	Per Annum Change 2019-20
	€m	€m	€m	€m	%	%	%
<b>Total All Sectors</b>	21,963	26,290	46,447	46,878	3.9%	6.6%	0.9%
<b>Manufacturing &amp; Other Industry</b>	18,823	20,306	34,700	35,710	3.3%	6.5%	2.9%
Food, Drink & Primary Production	9,227	10,893	16,131	16,266	2.9%	4.6%	0.8%
Traditional Manufacturing	5,914	4,919	8,727	8,645	1.9%	6.5%	-0.9%
Modern Manufacturing	1,191	1,263	2,300	2,667	4.1%	8.7%	16.0%
Energy, Water, Waste, Construction	2,492	3,231	7,543	8,132	6.1%	10.8%	7.8%
<b>Infor, Comm. &amp; Other Services</b>	3,140	5,983	11,747	11,169	6.6%	7.2%	-4.9%
Information, Comm. & Computer	1,224	1,896	4,040	3,829	5.9%	8.1%	-5.2%
Bus., Financial & Other Services	1,916	4,087	7,707	7,340	6.9%	6.7%	-4.8%

Total sales of Irish-owned manufacturing and service companies amounted to €46.9 billion in 2020 representing an 0.9% increase over the previous year's figures. In 2020 there was an increase in sales of 2.9% in the Manufacturing sector and a decrease of 4.9% in Services sector.

The largest sector for Irish-owned clients is the Food, Drink & Primary Production sector with sales of €16.3 billion in 2020 – an increase of 0.8% over 2019 and of 2.9% per annum increase over the 2000 figure of €9.2billion.

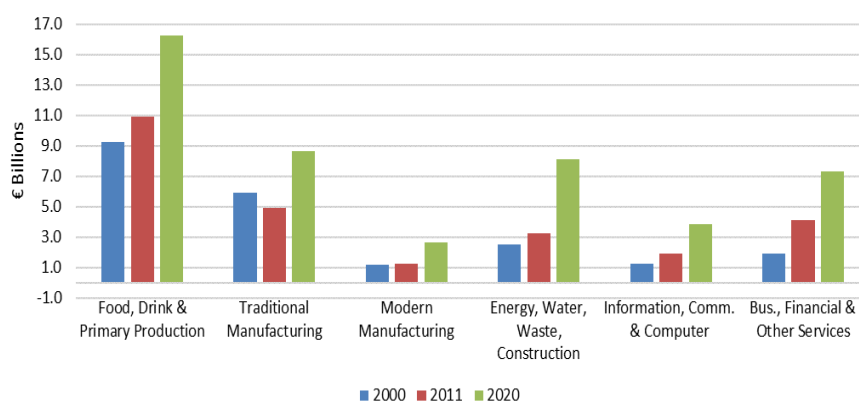
Traditional Manufacturing saw a decrease in sales of 0.9% over 2019 with sales of €8.6 billion. There has been a per annum increase of 1.9% over the 2000 figure of €5.9 billion.

Modern Manufacturing increased by 16.0% in 2020 to reach €2.6 billion.

Information, Communications & Other Services fell 4.9% over 2019 to 11.2 billion and had a per annum increase of 6.6% from the 2000 figure. The Business & Financial & Other sector decreased sales to €7.3 billion in 2020 from €7.7 billion in 2019. This represented an annualised increase of 6.9% since 2000.



Sales by sector - Irish-owned Client Companies



### 2.3 Changing Composition of Sales and Employment in Irish-owned Client Companies, 2000 and 2020

	Sales		Employment	
	2000	2020	2000	2020
<b>Manufacturing &amp; Other Industry</b>	<b>85.7%</b>	<b>76.2%</b>	<b>81.6%</b>	<b>67.7%</b>
Food & Drink	42.0%	34.7%	29.4%	23.9%
Traditional Manufacturing	26.9%	18.4%	40.1%	24.7%
Modern Manufacturing	5.4%	5.7%	7.8%	7.2%
Energy, Water, Waste, Construction	11.3%	17.3%	4.3%	11.8%
<b>Information, Communications &amp; Other Services</b>	<b>14.3%</b>	<b>23.8%</b>	<b>18.4%</b>	<b>32.3%</b>
Information, Communications & Computer	5.6%	8.2%	9.0%	14.7%
Business, Financial & Other Services	8.7%	15.7%	9.4%	17.6%

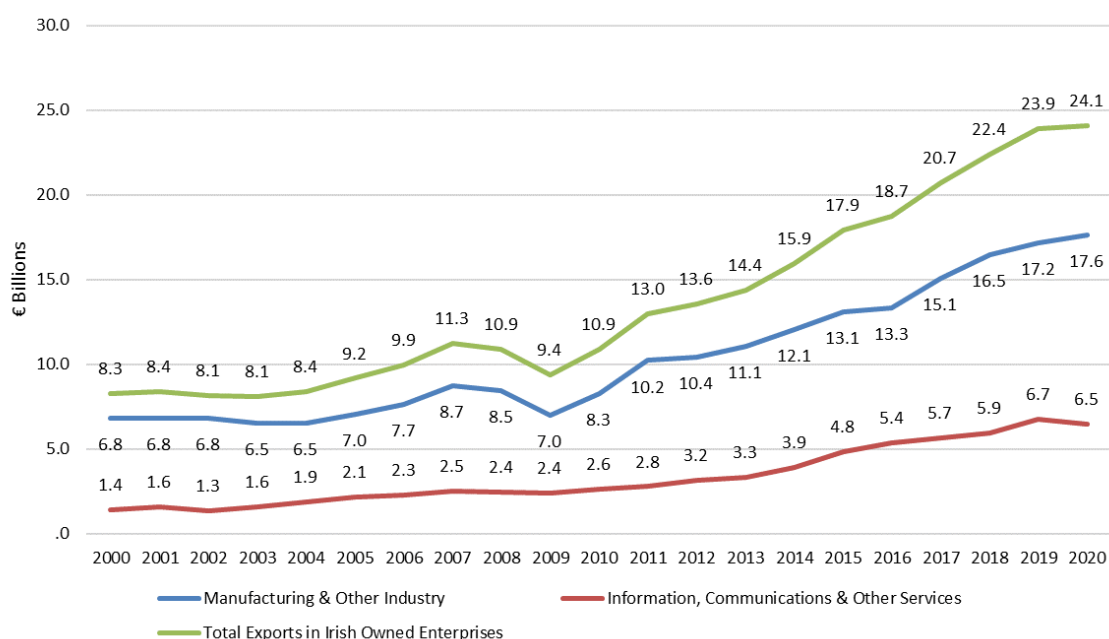
This table provides an overview of sales and employment across a number of broad industry groups to illustrate the changing composition of Irish-owned industry between 2000 and 2020.

- The majority of Irish-owned companies operate in the Manufacturing sector, though the share of total sales accounted for by manufacturing has dropped from 85.7% in 2000 to 76.2% in 2020. The Food, Drink & Primary Production sector dropped its share of sales over this period from 42.0% of total Irish-owned sales to 34.7%. The Traditional Manufacturing sector accounted for 18.4% of total sales in 2020 down from 26.9% in 2000.
- The share of sales accounted for by Information, Communication and Other Services has increased from 14.3% in 2000 to 23.8% in 2020, highlighting the increasing importance of these sectors. Within this the Business, Financial and Other Services sector doubled its share of sales from 8.7% to 15.7% over the period 2000-2020.
- While the Food, Drink & Primary Production sector accounted for 34.7% of the sales in Irish-owned industry in 2020, it accounts for 23.9% of the employment. Traditional Manufacturing has witnessed

its share of employment drop from 40.1% in 2000 to 24.7% in 2020 while the Energy, Water, Waste & Construction sectors have increased their employment from 4.3% to 11.8%.

- Overall, the Information, Communication and Other Services sector continues to see its share of Irish-owned employment rise significantly from 18.4% in 2000 to 32.3% in 2020.

#### 2.4 Exports in Irish-owned Client Companies, 2000-2020



This graph shows the level of exports by agency-assisted Irish-owned companies during the twenty years of this survey and shows the upward trend in the level of exports since 2010 and exports amounted to €24.1 billion in 2020.

Exports from the Irish-owned Manufacturing sectors in 2020 amounted to €17.6 billion, which represented 73.1% of all exports in that year. Service exports at €6.5 billion in same year represent 26.9% of total exports.

- Total exports in 2020 stood at €24.1 billion for all Manufacturing and Services companies and is the highest level of exports recorded over the course of this survey. This represents a 5.5% per annum change over the 2000 figure of €8.3 billion.
- In the Manufacturing sector, exports have increased steadily since a low in 2009 of €7.0 billion and amounted to €17.6 billion in 2020. This represents a 4.9% per annum increase on the 2000 figure of €6.8 billion and an 6.2% average per annum increase over the figure in 2011 of €10.2 billion. Exports in the Manufacturing sectors increased by 2.7% in 2020 over 2019.

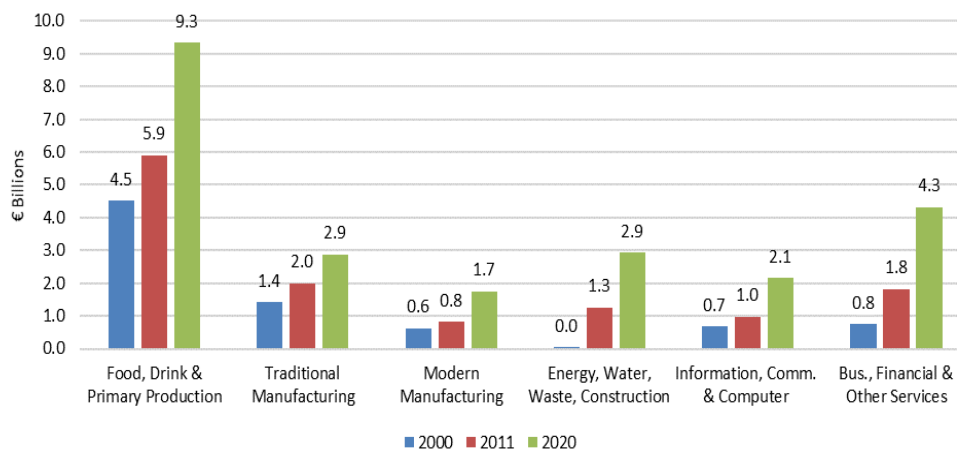
- The value of exports in the Services sector amounted to €1.4 billion in 2000 and has consistently grown in the intervening years to €6.5 billion by 2020. This represents a per annum change of 7.8% between the 2000 and 2020 export figures. Services exports fell by 4.1% between 2019 and 2020.

## 2.5 Exports by Sector in Irish-owned Companies, 2000, 2011, 2019 and 2020

	2000	2011	2019	2020	Per Annum Change 2000-19	Per Annum Change 2011-2020	Per Annum Change 2019-20
	€m	€m	€m	€m	%	%	%
<b>Total - All Sectors</b>	<b>8,250</b>	<b>12,994</b>	<b>23,899</b>	<b>24,086</b>	<b>5.5%</b>	<b>7.1%</b>	<b>0.8%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>6,821</b>	<b>10,221</b>	<b>17,162</b>	<b>17,626</b>	<b>4.9%</b>	<b>6.2%</b>	<b>2.7%</b>
Food, Drink & Primary Production	4,515	5,891	9,195	9,335	3.7%	5.2%	1.5%
Traditional Manufacturing	1,412	1,991	2,981	2,871	3.6%	4.2%	-3.7%
Modern Manufacturing	630	819	1,589	1,746	5.2%	8.8%	9.9%
Energy, Water, Waste, Construction	46	1,258	2,694	2,923	23.1%	9.8%	8.5%
<b>Infor., Comm. &amp; Other Services</b>	<b>1,429</b>	<b>2,773</b>	<b>6,737</b>	<b>6,461</b>	<b>7.8%</b>	<b>9.9%</b>	<b>-4.1%</b>
Information, Comm. & Computer	679	967	2,272	2,148	5.9%	9.3%	-5.5%
Bus., Financial & Other Services	750	1,807	4,465	4,313	9.1%	10.1%	-3.4%

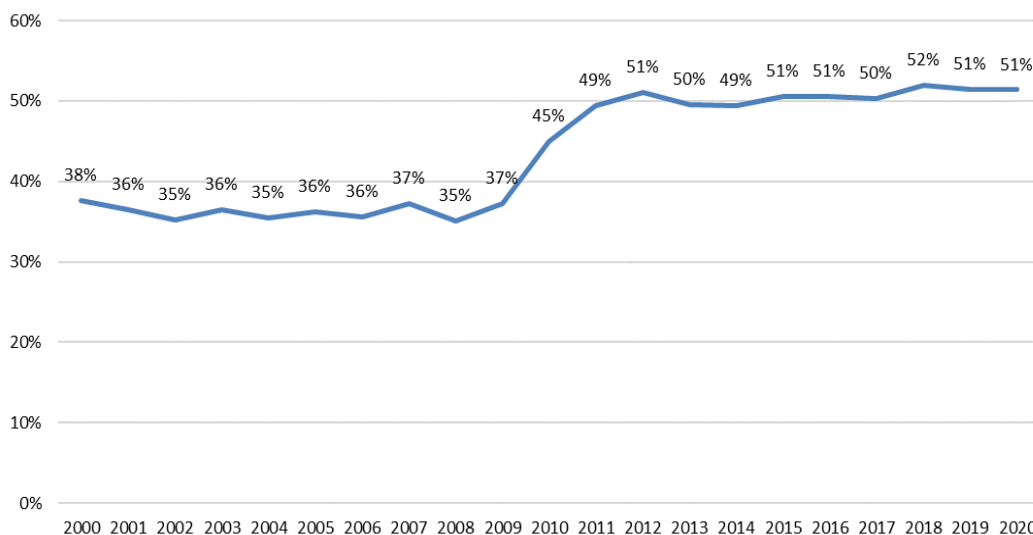
This table provides an overview of the export performance within the Irish-owned client companies in Manufacturing and Information, Communications and Other Services sectors.

Exports by Sector in Irish-owned Companies, 2000, 2011, 2020



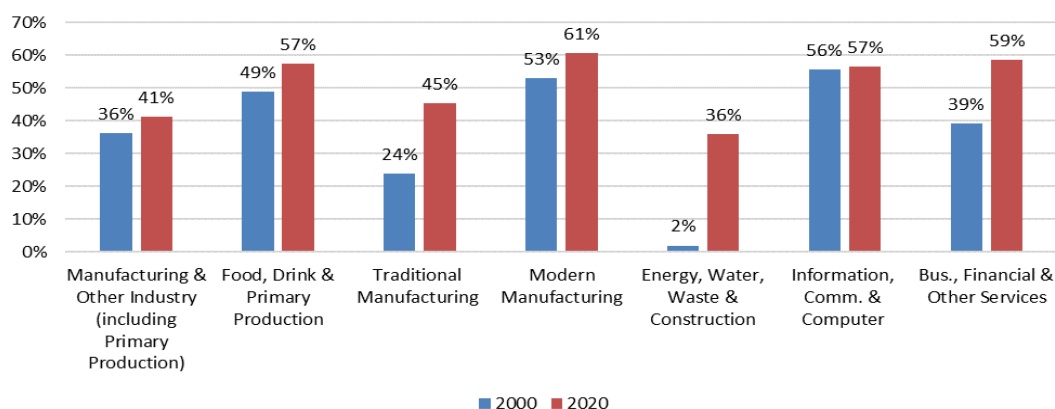
- The Food, Drink & Primary Production sector accounted for 38.7% of all exports of Irish-owned client firms in 2020. This sector has increased exports from €4.5bn in 2000 to €9.3bn in 2020, a per annum increase of 3.7% in current prices.
- Exports in Traditional Manufacturing decreased by 3.7% in 2020 over 2019 to €2.9 billion and now accounts for 11.9% of total exports.
- Modern Manufacturing reported an increase of 9.9% to €1.7 billion in 2020 compared to 1.6 billion in 2019. Modern Manufacturing accounts for 7.2% of Irish-owned firms total exports.
- The Energy, Water, Waste & Construction sector increased by 8.5% to €2.9 billion in the year to 2020 with 93.5% of this increase being in the construction sector. Energy, Water, Waste & Construction accounts for 12.1% of total exports.
- Exports of Information, Communication & Computer services among Irish-owned firms reported a decrease of 5.5% to stand at €2.1 billion in 2020. Exports of Information, Communication & Computer services returned a per annum growth of 5.9% since 2000 and this sector now accounts for 8.9% of total exports.
- In 2020, the Business, Financial and Other Services sectors exports declined by 3.4% when compared to 2019. Exports in this sector amounted to €4.3 billion and the sector now accounts for 17.9% of total exports.

**2.6 Exports as a percentage of Total Sales in Irish-owned Companies, 2000–2020**



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 five years. The above graph shows that the total export intensity of Irish-owned industry has increased from 38% in 2000 to 51% in 2020 and highlights the growing importance to Irish businesses of export markets.

**Exports as a percentage of Total Sales in Irish-owned Companies by Sector, 2000 and 2020**



This chart compares the export intensity of Irish-owned industry by sector for 2000 and 2020.

- The Food, Drink & Primary Production sector accounted for 38.8% of all export sales by Irish-owned companies in 2020 and has an export intensity of 57% in 2020, which is an increase on its 2000 intensity ratio of 49%.

- The sectors with the highest export intensity at 61% in 2020 are in Modern Manufacturing (Chemicals, Medical Devices and Computer, Electronic & Optical Products).
- The Business, Financial and Other Services sectors are next with 59% of all sales being exported in 2020, compared with 39% in 2000.

**2.7 Value Added in Irish-Owned Companies, 2000-2020**

	Total Value Added			Value Added as % of Sales		Value Added per Person Employed		
	2000	2020	Per Annum Change 2000-20	2000	2020	2000	2020	Per Annum Change 2000-20
	€m	€m	%	%	%	€k	€k	%
<b>Total - All Sectors</b>	<b>6,443</b>	<b>16,727</b>	<b>4.9%</b>	<b>25.7%</b>	<b>28.8%</b>	<b>46.5</b>	<b>96.9</b>	<b>3.7%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>4,669</b>	<b>10,636</b>	<b>4.2%</b>	<b>28.6%</b>	<b>38.6%</b>	<b>43.6</b>	<b>110.3</b>	<b>4.8%</b>
Food & Drink	1,437	3,277	4.2%	15.6%	20.1%	35.3	79.3	4.1%
Traditional Manufacturing	2,129	3,520	2.5%	36.0%	40.7%	38.3	82.4	3.9%
Modern Manufacturing	403	1,047	4.9%	33.9%	39.3%	37.4	84.6	4.2%
Energy, Water, Waste, Construction	699	2,792	7.2%	28.1%	34.3%	117.7	136.9	0.8%
<b>Info./Comm./ Other Services</b>	<b>1,775</b>	<b>6,091</b>	<b>6.4%</b>	<b>56.5%</b>	<b>54.5%</b>	<b>69.4</b>	<b>109.1</b>	<b>2.3%</b>
Information, Comm. & Computer	673	2,543	6.9%	55.0%	66.4%	54.0	100.0	3.1%
Business, Fin. & Other Services	1,101	3,548	6.0%	57.5%	48.3%	84.1	116.7	1.7%

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

- The total value added of Irish-owned Manufacturing and Information, Communication and Other Services is estimated at €16.7 billion in 2020. Total value added is estimated to have grown by .9% per annum in nominal terms over the period 2000-2020.
- Across all Irish-owned Manufacturing and Information, Communication and Other Services sectors, value added as a percentage of sales has increased from 25.7% in 2000 to 28.8% in 2020.
- Overall, value added per person employed in Manufacturing and Information, Communication and Other Services is estimated at €96,900 in 2020, an increase of 3.9% 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 2020

	Total Payroll			Payroll per Employee		
	2000	2020	Per annum change 2000-20	2000	2020	Per annum change 2000-20
	€m	€m	%	€k	€k	%
<b>Total - All Sectors</b>	<b>3,827</b>	<b>8,739</b>	<b>4.2%</b>	<b>27.6</b>	<b>50.6</b>	<b>3.1%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>3,015</b>	<b>5,486</b>	<b>3.0%</b>	<b>28.1</b>	<b>56.9</b>	<b>3.6%</b>
Food, Drink & Primary Production	1,076	1,758	2.5%	26.4	42.5	2.4%
Traditional Manufacturing	1,355	2,017	2.0%	24.4	47.2	3.4%
Modern Manufacturing	266	616	4.3%	24.6	49.7	3.6%
Energy, Water, Waste, Construction	319	1,095	6.4%	53.7	53.7	0.0%
<b>Info./Comm./Other Services</b>	<b>812</b>	<b>3,252</b>	<b>7.2%</b>	<b>31.8</b>	<b>58.3</b>	<b>3.1%</b>
Information, Comm./ Computer	480	1,530	6.0%	38.5	60.2	2.3%
Business, Financial & Other Services	333	1,722	8.6%	25.4	56.7	4.1%

This table shows that the total amount paid by Irish-owned Manufacturing and Information, Communication and Other Services on payroll (including taxes etc.) was approximately €8.7 billion in 2020.

Total payroll has increased at a rate of 4.2% per annum over the period 2000-2020. Payroll in the Manufacturing sector and the Information, Communication and Other Services sector increased from €3.8 billion in 2000 to €8.7 billion in 2020. Manufacturing and Other Industry firms accounts for 62.7% (€5.5 billion) of total payroll. The Information, Communication and Other Internationally Traded Services firms account for 37.2 % (€3.2 billion) in 2020.

Payroll per employee in Irish-owned Manufacturing and Information, Communication and Other Services sectors averaged at €50,621 in 2020, representing an increase of 3.1% per annum over the period 2000 to 2020.

- In the Manufacturing & Other Industry sector, payroll per employee increased from €28,133 in 2000 to €56,904 in 2020. This is a per annum increase of 3.6%.
- In the Information, Communication and Other Services sectors, payroll per employee increased by 3.1% per annum going from €31,787 in 2000 to €58,257 in 2020.
- The highest average payroll per employee figure in 2020, was €60,161 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, 2020

	Materials Purchased 2020			Services Purchased 2020		
	Total Materials	Irish Materials	Irish as % Total	Total Services	Irish Services	Irish as % Total
	€m	€m	%	€m	€m	%
<b>Total - All Sectors</b>	<b>20,481</b>	<b>12,872</b>	<b>62.8%</b>	<b>9,670</b>	<b>5,952</b>	<b>61.6%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>18,899</b>	<b>11,134</b>	<b>58.9%</b>	<b>3,065</b>	<b>2,482</b>	<b>81.0%</b>
Food, Drink & Primary Production	11,314	9,021	79.7%	1,675	1,388	82.9%
Traditional Manufacturing	4,064	1,766	43.5%	1,061	862	81.2%
Modern Manufacturing	1,290	347	26.9%	329	232	70.5%
Energy, Water, Waste, Construction	2,230	1,171	52.5%	3,109	1,930	62.1%
<b>Information, Comm. &amp; Other Services</b>	<b>1,582</b>	<b>566</b>	<b>35.8%</b>	<b>3,495</b>	<b>1,541</b>	<b>44.1%</b>
Information, Comm. & Computer	473	153	32.3%	813	519	63.8%
Business, Financial & Other Services	1,109	414	37.3%	2,682	1,022	38.1%

Total raw materials purchases amounted to approximately €20.4 billion in 2020, of which €12.8 billion (62.8%) was sourced in Ireland.

- Within the Food, Drink & Primary Production sector, Irish raw materials at €9.0 billion accounted for 79.7% of the total materials spend in that sector. Of all the Irish raw materials purchases by Irish-owned firms, the majority or 70.1% related to the Food and Drink sector in 2020.
- Within the Traditional Manufacturing sectors, 43.5% of materials were sourced in Ireland in 2020, amounting to over €1.8 billion in value.
- For Modern Manufacturing, 26.9% of total materials purchases were Irish materials, amounting to €347 million.
- In the Energy, Water, Waste & Construction sectors 52.5% of all materials were bought in Ireland in 2020.

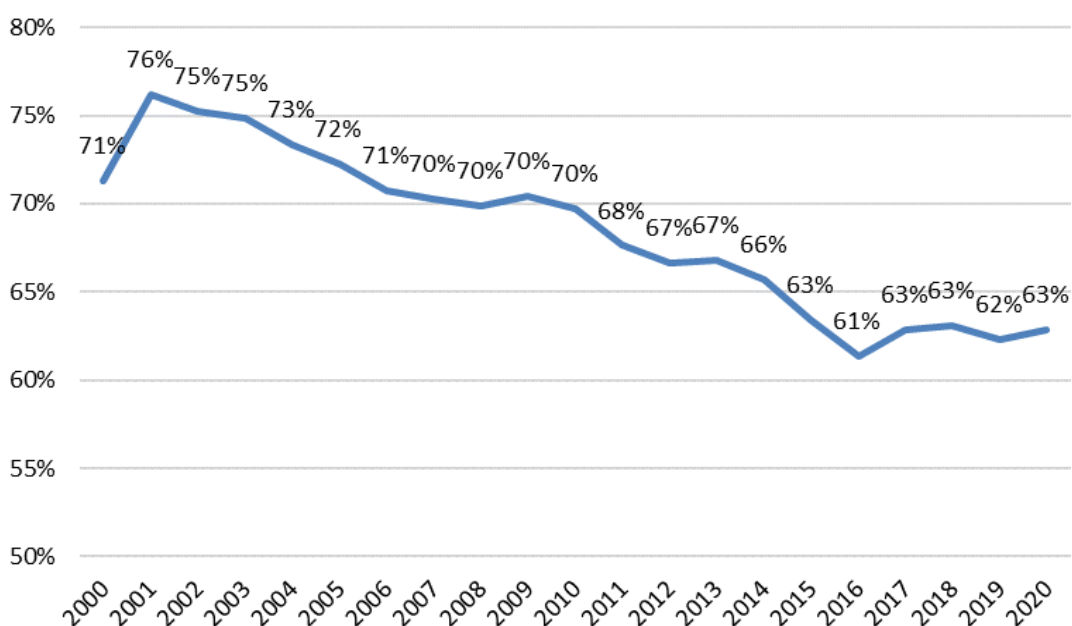
In addition to raw materials, Irish-owned Manufacturing and Information, Communication and Other Services firms spent a further €9.6 billion on services in 2020, with 61.6%, or €5.9 billion sourced in Ireland.

- The proportion of Irish services purchased by Irish-owned firms, ranges from 38.1% for Business, Financial and Other Services firms to 82.9% for Food, Drink & Primary Production firms.
- Overall, the €12.8 billion of materials purchased in Ireland in 2020 continue to significantly outweigh the services purchased in Ireland which stand at €5.9 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, 2000-2020**

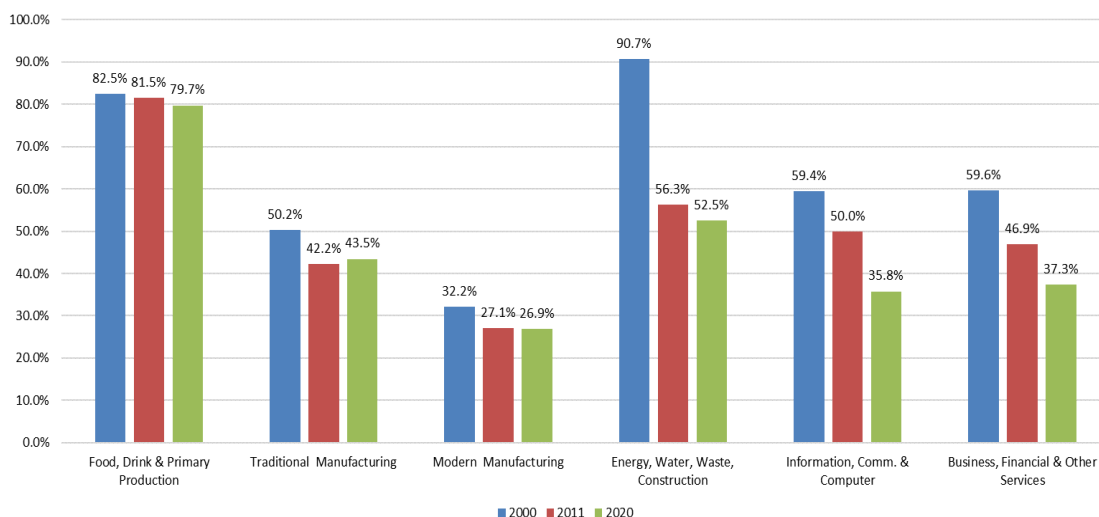


This graph maps out the share of total materials sourced in Ireland by Irish-owned Manufacturing and Services firms. In 2020, 63% of all materials purchased were sourced in Ireland compared with 71% in 2000. The 2020 returns showed a increase of 1.0% over the 2019 figures.

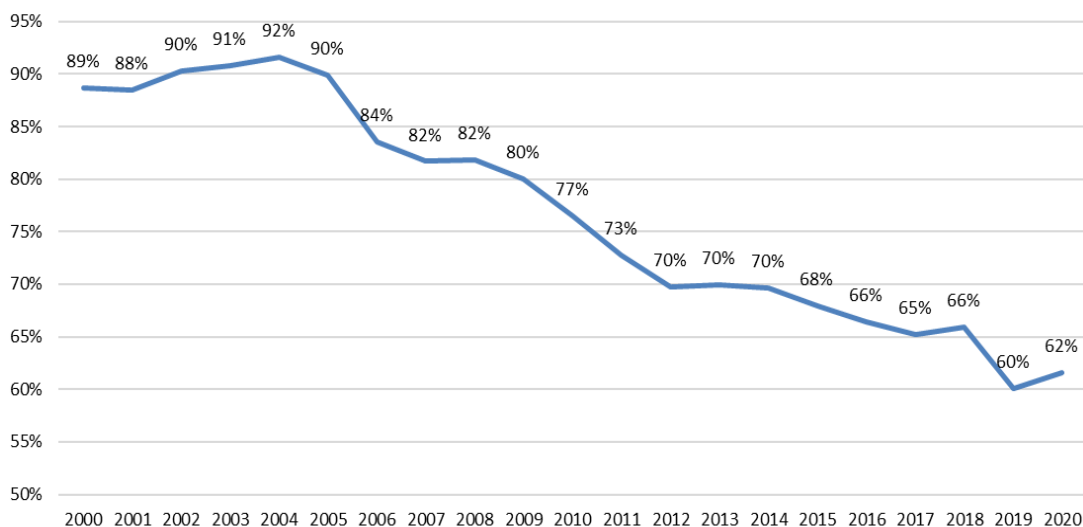
The bar chart below sets out the position by sector for 2000, 2011 and 2020:

- The Food, Drink & Primary Production sector purchased the majority or 79.7% of its materials in Ireland in 2020. This represents a decline from the 2000 and 2011 figures of 82.5% and 81.5%. (Absolute value was €9,021m).
- There has also been a decline in the percentage of materials sourced in Ireland by the Energy, Waste, Water & Construction sectors, in 2000 the figure was 90.7%, but in 2020 the percentage of Irish sourced materials was 52.5% (Absolute value was €950m).
- The Traditional Manufacturing sector share of Irish-sourced materials stood at 50.2% in 2000 and has decreased since and its purchases of Irish-sourced materials now represent 43.5% of total materials outlay in 2020. (Absolute value was €1,171m).
- The total value of Irish materials purchased by the services sectors amounted to €566m in 2020, 35.8% of their total spend on materials.

**Irish-Sourced Materials as a Share of Total Material Purchased, 2000, 2011, 2020**



**2.11 Irish-Sourced Services as a Share of All Service Purchased, 2000-2020**



This graph shows the share of total services sourced in Ireland by Irish-owned Manufacturing and Services firms. At 62%, the majority of services purchases were sourced in Ireland in 2020 though this represents a decline from 89% from 2000.

The bar chart below shows that purchases of Irish services ranged between 44% in the Business, Finance & Other Services sector to 83% in the Traditional Manufacturing sector in 2020. Since 2000, the percentage of services purchased in Ireland has decreased across most sectors.

The Food and Drink sector’s share of Irish services purchases has decreased from 91% in 2000 to 83% in 2020. (Absolute value was €1,388m).

Traditional Manufacturing increased its share of Irish services purchases to 83% in 2020 from 82% in 2000. (Absolute value was €918 million).

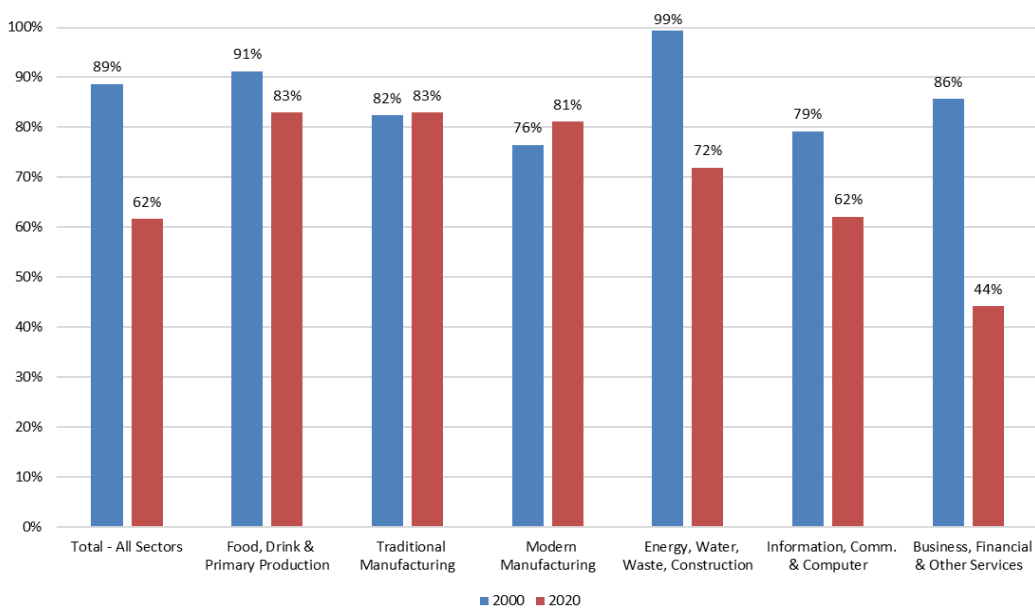
The Modern Manufacturing sector’s share of services sourced in Ireland increased from 76% in 2000 to 81% in 2020. (Absolute value was €176 million).

The Information, Communications and Computer sector’s share of services purchases sourced in Ireland fell from 79% in 2000 to 62% in 2020. (Absolute value was €519 million).

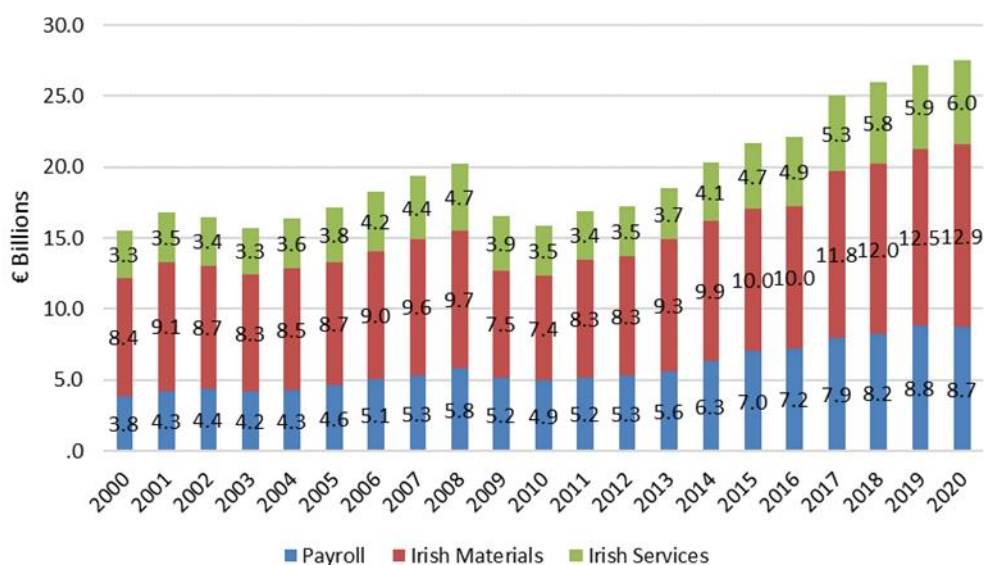
The Business, Financial and Other Services sector sourced 44% of their services requirements in Ireland in 2020, down from 86% in 2000. (Absolute value was €1,022 million).

The Energy, Water, Waste & Construction sectors sourced 70% of their services in Ireland at a value of €1,930m.

**Irish-Sourced Services as a Share of All Service Purchased, 2000 and 2020**



2.12 Total Direct Expenditure in the Irish Economy by Irish-Owned Companies, 2000-2020



This chart summarises the total expenditure in the domestic economy by Irish-owned manufacturing and services firms throughout the period 2000-2020.

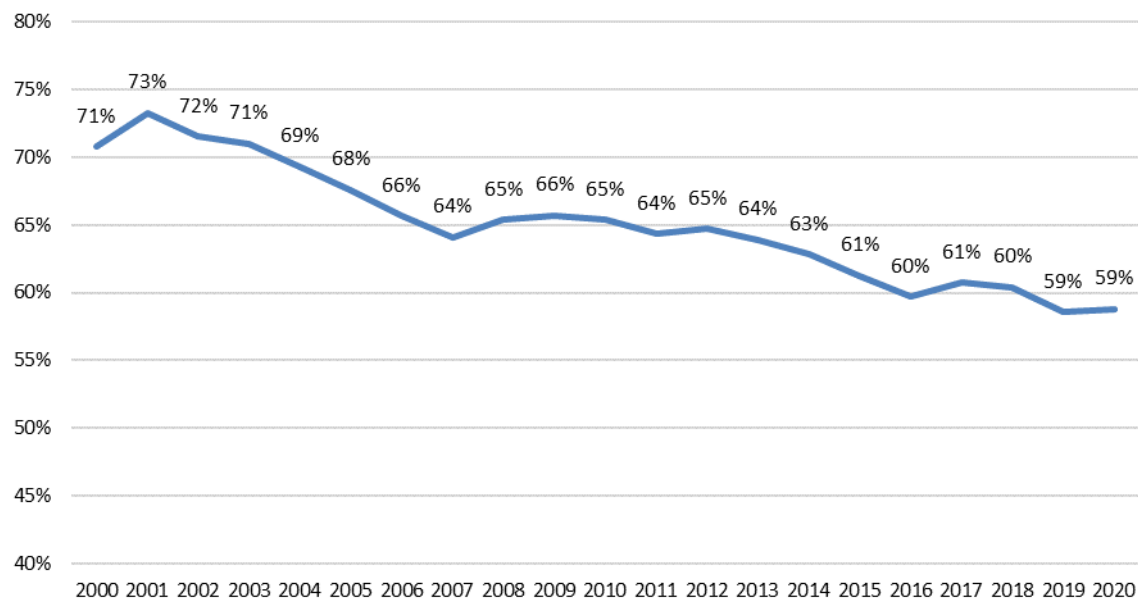
- In total, Irish-owned firms spent €27.6 billion in the domestic economy in 2020, comprising of:
  - €8.7 billion on payroll;
  - €12.9 billion on Irish raw materials;
  - €6.0 billion on Irish services.

This represents an annual increase in 2020 of 1.4% over 2019 returns.

- Direct expenditure has increased from €15.6 billion in 2000 to 27.6 billion in 2020 and represents an overall nominal increase of 2.9% per annum between 2000 and 2020. Over the period 2000 to 2020:
  - Expenditure on payroll increased at 4.2% per annum.
  - Expenditure on materials sourced in Ireland has increased by 2.2% per annum.
  - Expenditure on services sourced in Ireland has increased by 2.9% per annum.
- The composition of direct expenditure has changed over this series. In 2000 payroll made up 25%, Irish materials were 54% and Irish services were 21% of total Irish economy expenditure. In 2020, these shares have changed, with payroll now making up 32%, Irish materials accounting for 47% and Irish services accounting for 21% 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, 2000-2020**

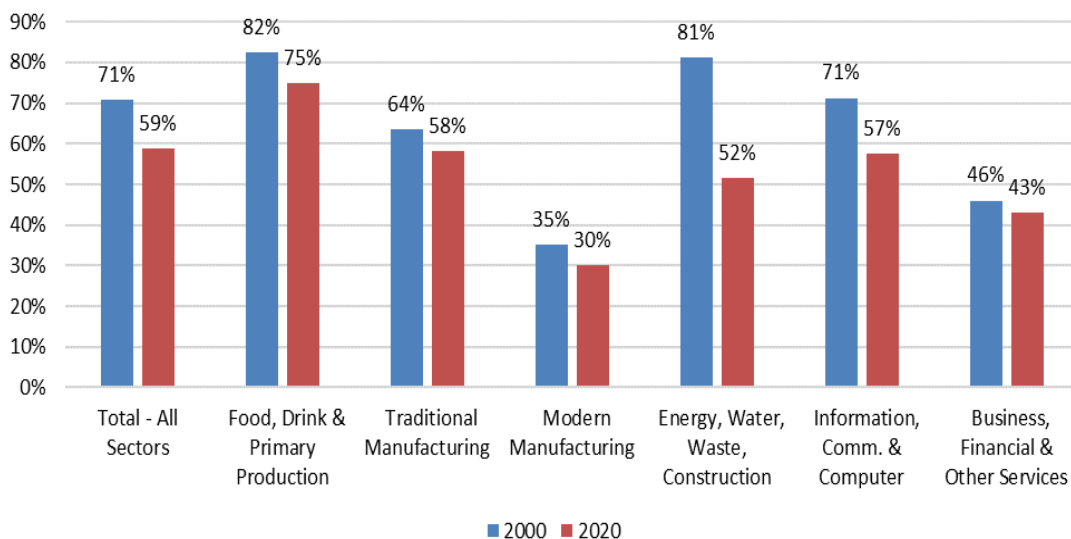


This chart shows the trend in direct expenditure in the economy as a percentage of sales for all Irish-owned firms and for the broad aggregated sectors.

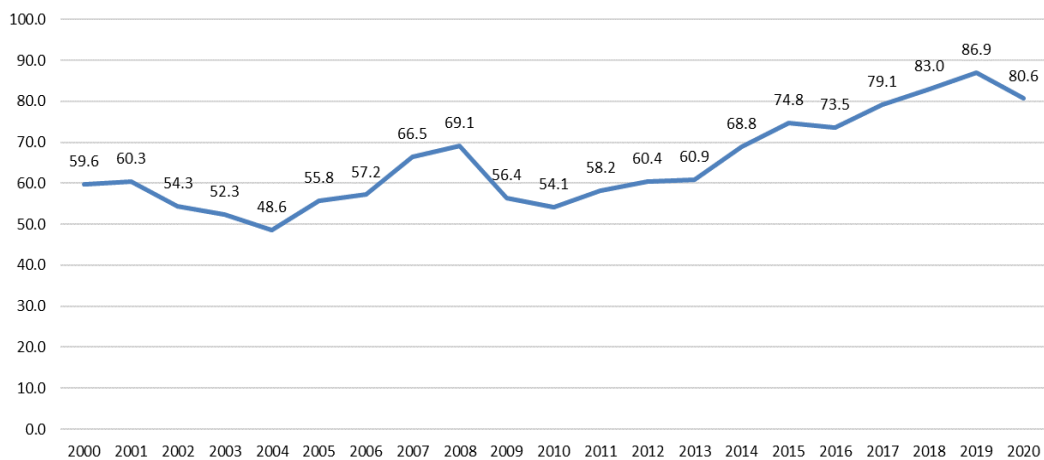
Total direct expenditure as a percentage of sales stood at 71% in 2000. By 2011 this percentage had reduced to 64% and in 2020 stands at 59%.

- The Food, Drink & Primary Production sector maintained the highest share of direct expenditure as a percentage of sales at 75% in 2020 down from 82% in 2000.
- The Energy Water, Waste and Construction sector also saw a fall-off on this metric from 81% in 2000 to 52% in 2020.
- In percentage terms direct expenditure in the Information, Communications and Computer Services sector stood at 71% of sales in 2000 and decreased to 57% in 2020.
- 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**



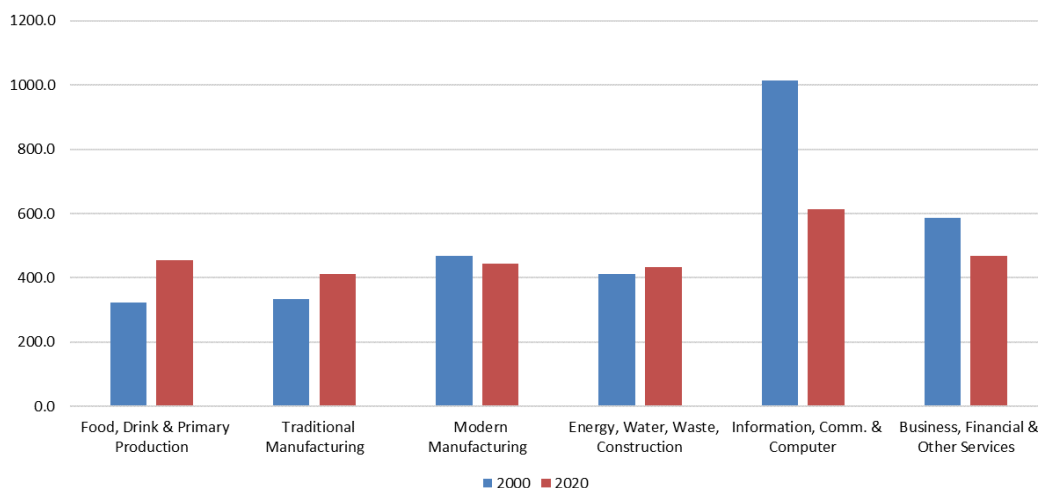
**2.14 Formal Structured Training in Irish-owned Companies, 2000-2020**



Total expenditure on training amounted to €80.6 million in 2020. This represents a fall in formal structured training of 7.5% when compared to the 2019 return of 86.9 million.

The manufacturing and other sectors spent €41.9 million on training in 2020, accounting for 52.0% of total training expenditure. Expenditure on training in the services sectors also increased in 2020 to €29.9 million.

**Formal Structured Training per person employed in Irish-owned Companies by Sector, 2000-2020**



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

- The Traditional Manufacturing sector spent €17.6 million on training in 2020 which represents 21.8% of all training expenditure by all Irish-owned client companies.
- The next highest spending sector was Food, Drink & Primary Production with €18.8 million in 2020.
- Overall expenditure on training per person employed in Irish-owned companies decreased from €518 in 2019 to €467 in 2020. Since 2000 expenditure on training per person has increased from €430 to €467.
- The biggest change in training per person employed was in the IT Services sector where it decreased from €1,014 in 2000 to €615 in 2020, a decline of 39.4%. Energy, Water, Waste and Construction sector increased expenditure on training per person employed by 5.1% between 2000 and 2020 to €434.

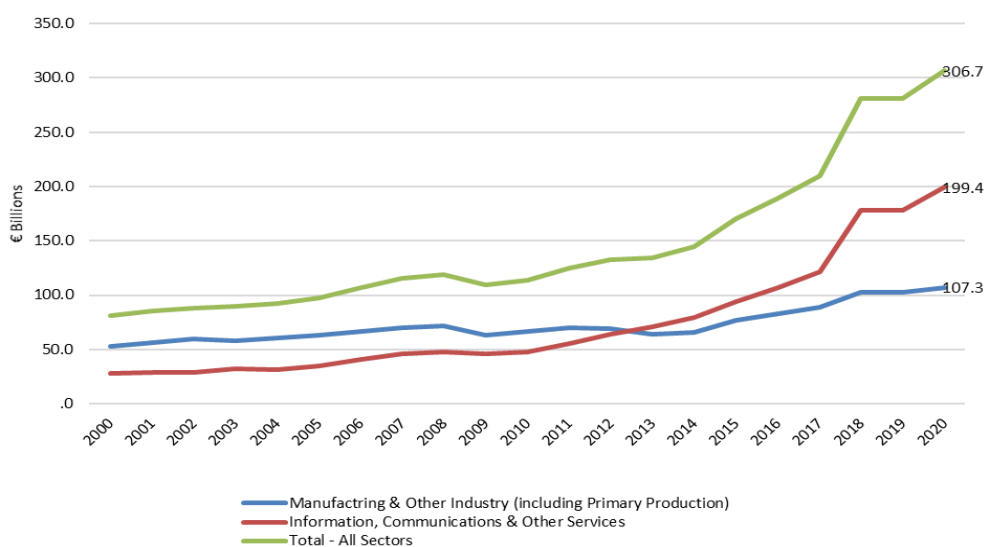
### Definition of Training

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, 2000-2020



Total sales of foreign-owned agency assisted companies increased by 9.2% per annum in nominal terms over 2019, amounting to €306.7 billion in 2020.

- Manufacturing and Other Industry sectors accounted for €107.3 billion of total sales, equating to 35% of all sales in foreign-owned companies.
  - Sales in the Manufacturing sectors increased by 4.8% in 2020 over the previous year.
  - The per annum average increase over the twenty-one years from 2000-2020 for Manufacturing sectors is 3.8%. Sales have fluctuated since 2011 but the last seven years saw a substantial recovery in the value of total sales.
- Energy, Water, Waste and Construction sector saw total sales increase from €68.3 billion in 2000 to €322.1 billion in 2020. This represents a sectoral increase of 371.5%.
  - Construction sector was the largest driver in Energy, Water, Waste and Construction with total sales accounting for 90% of the sector.
  - Total Sales decreased in the Energy sector from €18 million in 2019 to total sales of €16 million in 2020.

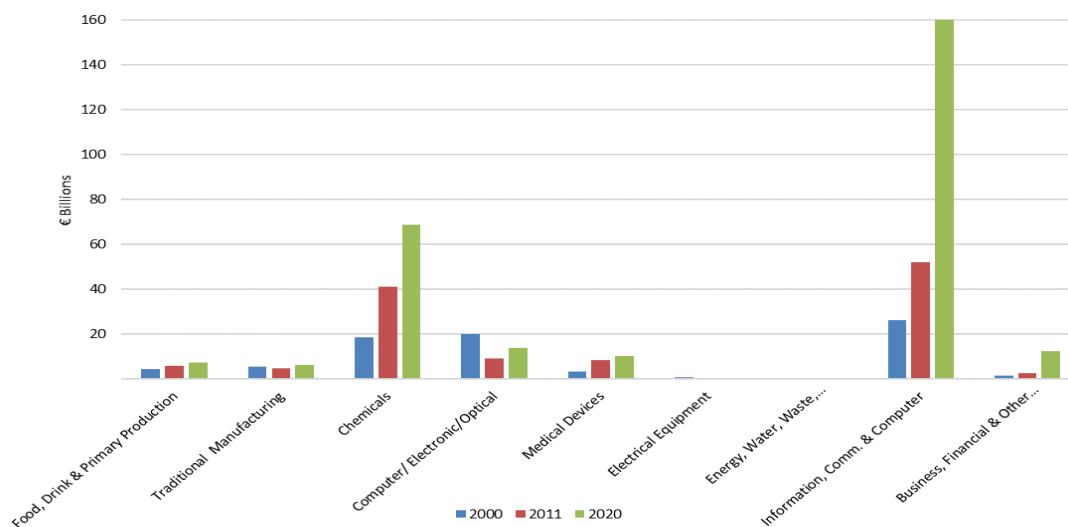
- Sales in the Internationally-traded Services<sup>7</sup> sectors have continued to exceed those of the Manufacturing sectors and this trend has continued since 2013.
  - Internationally-traded Services sales have steadily increased from €27.9 billion in 2000 to €199.4 billion in 2020. This is a per annum average increase of 10.3% over that twenty-one-year period.
  - The 2020 sales figure of €199.4 billion represents an increase of 11.8% over the 2019 sales figure of €178.4 billion.

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

	2000	2011	2019	2020	Per Annum Change 2000-20	Per Annum Change 2011-20	Per Annum Change 2019-20
	€m	€m	€m	€m	%	%	%
<b>Total - All Sectors</b>	<b>81,009</b>	<b>124,923</b>	<b>280,851</b>	<b>306,702</b>	<b>6.9%</b>	<b>10.5%</b>	<b>9.2%</b>
<b>Manufacturing &amp; Other Industry</b>	<b>53,132</b>	<b>69,800</b>	<b>102,412</b>	<b>107,286</b>	<b>3.6%</b>	<b>4.9%</b>	<b>4.8%</b>
Food & Drink	4,334	5,883	7,452	7,317	2.7%	2.5%	-1.8%
Traditional Manufacturing	5,723	4,787	6,134	6,159	0.4%	2.8%	0.4%
Chemicals	18,697	41,284	63,814	68,927	6.7%	5.9%	8.0%
Computer/ Electronic/Optical	19,955	9,064	13,757	14,135	-1.7%	5.1%	2.8%
Medical Devices	3,354	8,340	10,716	10,191	5.7%	2.3%	-4.9%
<b>Infor., Comm. &amp; Other Services</b>	<b>27,878</b>	<b>55,123</b>	<b>178,440</b>	<b>199,416</b>	<b>10.3%</b>	<b>15.4%</b>	<b>11.8%</b>
Infor., Comm. & Computer	26,168	52,311	166,216	186,869	10.3%	15.2%	12.4%
Bus., Financial & Other	1,710	2,812	12,224	12,546	10.5%	18.1%	2.6%

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

Sales by sector - Foreign-owned Companies, 2000, 2011, 2020



Between 2000 and 2020, the Information, Communications and Computer Services sector, recorded a per annum growth of 10.3% and at €186.8 billion represented 60.9% of total sales by foreign-owned client firms in 2020.

- The Chemicals sector accounted for 22.5% of total sales in 2020. Sales in the sector totalled €68.9 billion in 2020, a per annum increase of 6.7% over the 2000 sales figure of €18.6 billion.
- The Computer, Electronic and Optical Products sector reported sales of €14.1 billion in 2020, an increase of 2.8% over the 2019 figure of €13.7 billion. This is a sector that has seen a per annum decrease of -1.7% since 2000.

### 3.3 Changing Composition of Sales and Employment in Foreign-owned Client Companies 2000 and 2020

	Sales		Employment	
	2000	2020	2000	2020
<b>Manufacturing &amp; Other Industry</b>	<b>65.6%</b>	<b>35.0%</b>	<b>71.9%</b>	<b>44.8%</b>
Food, Drink & Primary Production	5.3%	2.4%	6.8%	3.4%
Traditional Manufacturing	7.1%	1.9%	20.1%	7.9%
Chemicals	23.1%	22.5%	13.1%	12.5%
Computer, Electronic & Optical Products	24.6%	4.6%	18.8%	5.9%
Medical Devices	4.1%	12.6%	8.9%	14.6%
Electrical Equipment	1.2%	0.7%	3.7%	0.5%
Energy, Waste, Water, Construction	0.1%	0.4%	0.5%	0.2%
<b>Information, Comm. &amp; Other Services</b>	<b>34.4%</b>	<b>65.0%</b>	<b>28.1%</b>	<b>55.2%</b>
Information, Comm. & Computer	32.3%	60.9%	24.2%	40.6%
Business, Financial & Other Services	2.1%	4.1%	3.9%	14.6%

This table traces the evolution of the foreign-owned Manufacturing and Information, Communication and Other Services Internationally Traded Services base over the period 2000 to 2020.

In terms of sales, the relative importance of manufacturing activity has decreased, accounting for 35% of all sales in 2020, down from 65.6% in 2000. The Information, Communication & Other Services now accounts for 65.0% of sales, up from 34.4% in 2000.

In 2020, the following two sectors made up 83.4% of total sales of foreign-owned companies:

- Information, Communication and Computer Services sector (60.9%)
- Chemicals sector (22.5%)

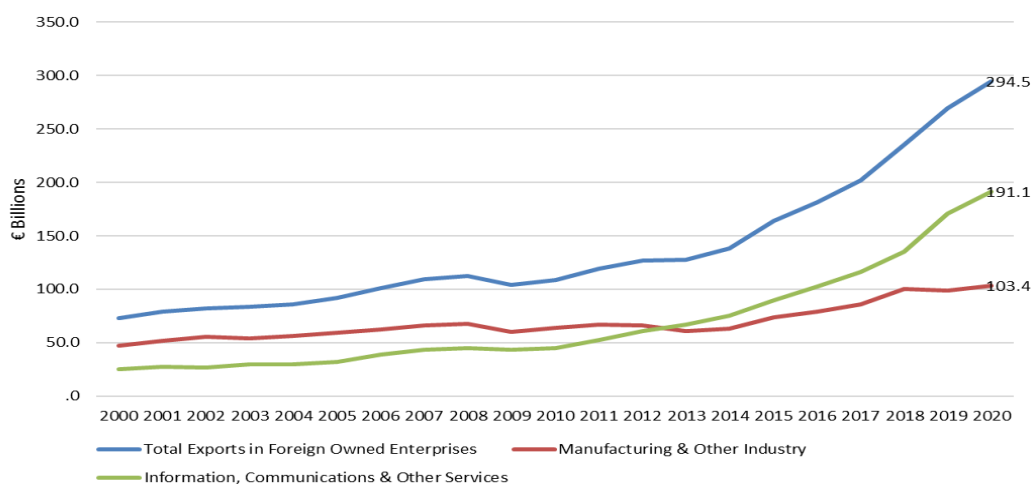
In terms of employment, a different pattern emerges, with Manufacturing accounting for less than half of employment (44.8%) in 2020.

- The Medical Devices sector has 14.6% of employment, up from 8.9% in 2000.
- The Chemicals sector is the next most significant in terms of employment with 12.5% which is a decrease on the 2000 figure of 13.1%.

In Internationally-traded Services:

- The Information, Communications and Computer Services sector has the highest share of total employment, at 40.6% in 2020, up from 24.2% in 2000.

### 3.4 Exports in Foreign-owned Client Companies, 2000-2020



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

The 2020 export sales figure of foreign-owned companies in Ireland at €294.5 billion equates to 95.6% 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 11.9% in 2020 over the 2019 figure of €191.1 billion and with the exception of 2009 have recorded increases in every year since 2000.
  - The Information, Communications and Other Services sector accounted for 64.9% of all export sales in 2020 at €191.1 billion.
  - This important sector has seen an annual average increase of 10.6% in the twenty-one-year period between 2000 and 2020.
- The Manufacturing sectors accounted for 35.1% of all exports in foreign-owned companies in Ireland in 2020 and amounted to €103.4 billion.

- Manufacturing exports increased by 9.3% in 2020 over the 2019 export sales figure of €98.7 million.
- The average annualised increase in Manufacturing exports since 2000 is 4.0% from a base of €47.3 billion in current prices rising to 103.4 billion in 2020.

## 3.5 Exports by Sector in Foreign-owned Companies, 2000, 2011, 2019 and 2020

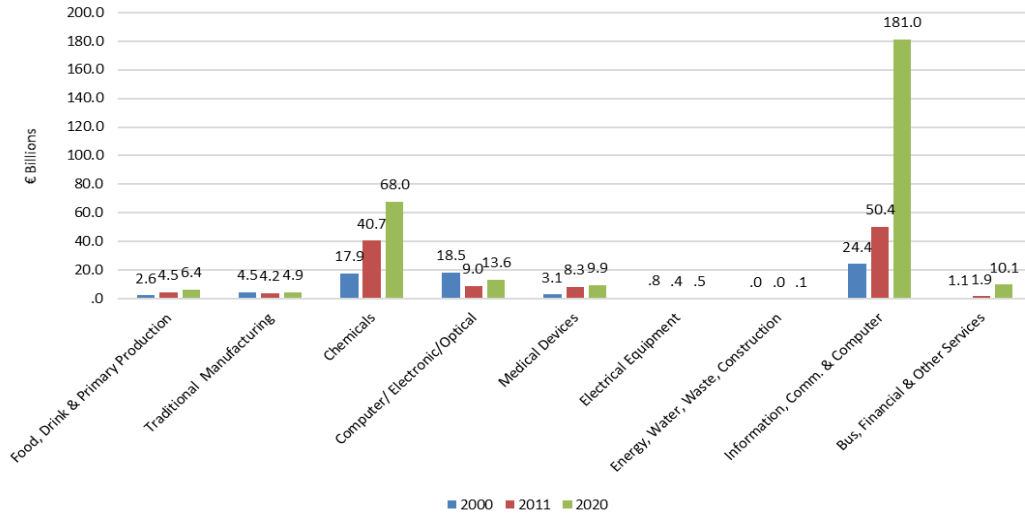
	2000	2011	2019	2020	Per Annum Change 2000-20	Per Annum Change 2011-20	Per Annum Change 2019- 20
	€m	€m	€m	€m	%	%	%
Total All Sectors	72,814	119,388	269,434	294,466	7.2%	10.6%	9.3%
<b>Manufacturing &amp; Other Industry</b>	<b>47,342</b>	<b>67,093</b>	<b>98,672</b>	<b>103,409</b>	<b>4.0%</b>	<b>4.9%</b>	<b>4.8%</b>
Food, Drink & Primary Production	2,566	4,534	6,432	6,397	4.7%	3.9%	-0.6%
Traditional Manufacturing	5,339	4,526	5,381	5,396	0.1%	2.0%	0.3%
Chemicals	17,899	40,676	62,984	67,982	6.9%	5.9%	7.9%
Computer, Electronic & Optical	18,461	8,988	13,319	13,645	-1.5%	4.7%	2.4%
Medical Devices	3,054	8,325	10,506	9,897	6.1%	1.9%	-5.8%
Energy, waste, water, construction	252	237	364	717	5.4%	13.1%	96.9%
<b>Infor., Comm. &amp; Other Services</b>	<b>25,472</b>	<b>52,295</b>	<b>170,761</b>	<b>191,057</b>	<b>10.6%</b>	<b>15.5%</b>	<b>11.9%</b>
Infor., Comm. & Computer	24,400	50,417	160,542	180,967	10.5%	15.3%	12.7%
Bus., Financial & Other Services	1,072	1,878	10,220	10,091	11.9%	20.5%	-1.3%

The Information, Communications & Computer services sector had the largest level of exports in 2020 at €180.9 billion. This is an increase of 12.7% over 2019 and an 10.5% annual increase in nominal terms since 2000 when exports stood at €24.4 billion.

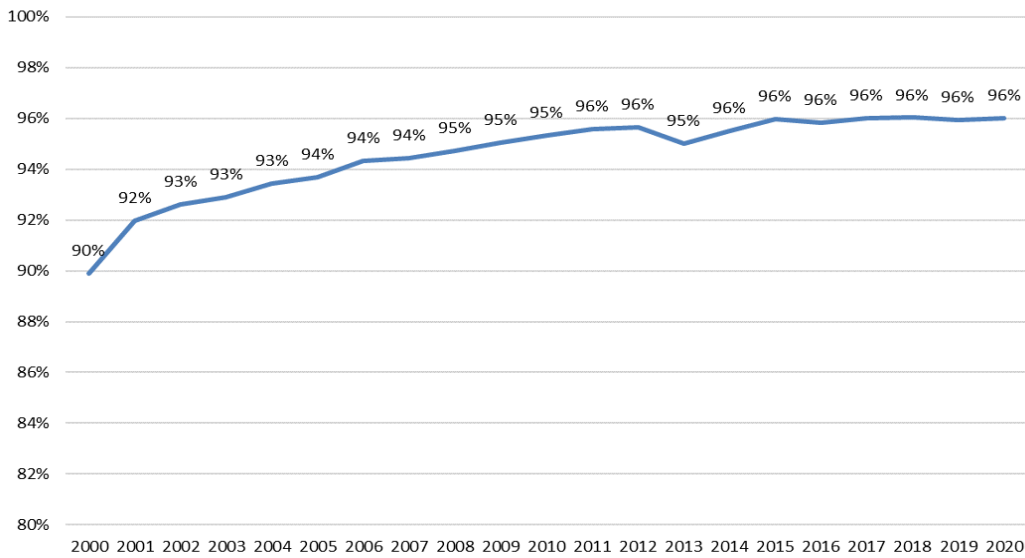
Exports in the Chemicals sector were also significant in 2020 at €67.9 billion, an increase of 7.9% in 2020 over 2019 and an average annual increase of 6.9% since 2000.

The Computer, Electronic & Optical sector saw an increase of 2.4% 2020 over 2019 with exports of €13.6 billion. This sector's exports experienced an average annual decrease of 1.5% between 2000 and 2020.

**Exports by Sector in Foreign-owned Companies, 2000, 2011, and 2020**



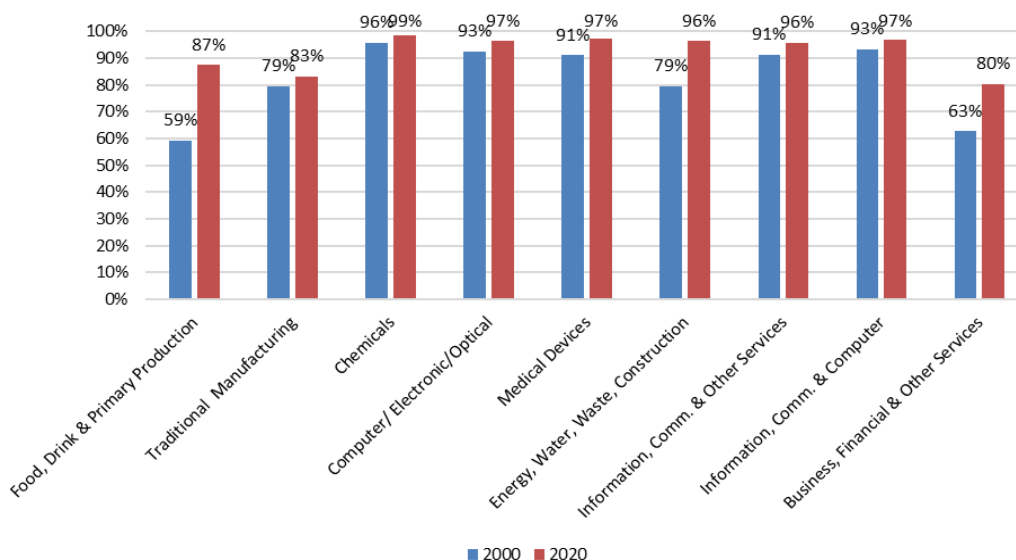
**3.6 Exports as a percentage of Total Sales in Foreign-owned Companies, 2000-2020**



- The total export intensity of foreign-owned industry has increased from 90% in 2000 to 96% in 2011. Following a decrease to 95% in 2013 it has remained stable at 96% since then.
- All sectors have increased their export intensity since 2000.



Exports as a percentage of Total Sales in Foreign-owned Companies, 2000, 2020



- The foreign-owned high-tech manufacturing sectors of: Chemicals produce goods almost exclusively for export with approximately 99% of all sales being exported.
- Computer, Electronic and Optical and Medical Devices exported 97% of their manufactured goods for export.
- The Information, Communication and Computer Services sector also exported 97% of their services in 2020, up from 93% in 2000.
- The Food, Drink & Primary Production sector, with an 87% share of sales for export in 2020, increased its proportion of exports from 59% in 2000.
- Similarly, the Traditional Manufacturing sector has increased its proportion of sales for export, from 79% in 2000 to 83% in 2020.

## 3.7 Value Added in Foreign-owned Companies, 2000-2020

	Total Value Added			Value Added as % Sales		Value Added per Person Employed		
	2000	2020	Per Annum Change 2000-20	2000	2020	2000	2000	Per Annum Change 2000-20
	€m	€m	%	%	%	€k	€k	%
Total - All Sectors	34,280	120,600	6.5%	42.3%	39.3%	199.1	552.9	5.2%
<b>Manu./ Other Industry</b>	<b>24,359</b>	<b>56,566</b>	<b>4.3%</b>	<b>45.8%</b>	<b>52.7%</b>	<b>196.5</b>	<b>574.1</b>	<b>5.5%</b>
Food & Drink	1,954	3,736	3.3%	45.1%	51.1%	161.5	505.1	5.9%
Traditional Manu.	2,454	2,493	0.1%	36.6%	39.0%	51.3	121.6	4.4%
Chemicals	10,529	36,685	6.4%	56.3%	53.2%	466.1	1349.4	5.5%
Computer, Electronic & Optical	7,525	9,497	1.2%	37.7%	67.2%	232.8	739.1	5.9%
Medical Devices	1,875	4,123	4.0%	55.9%	40.5%	122.4	129.4	0.3%
Energy, Water, Waste, Construction	94	370	7.1%	35.8%	38.9%	57.0	193.8	6.3%
<b>Inform./ Comm. &amp; Other Services</b>	<b>9,921</b>	<b>64,034</b>	<b>9.8%</b>	<b>35.6%</b>	<b>32.1%</b>	<b>205.8</b>	<b>535.4</b>	<b>4.9%</b>
Information/ Comm. & Computer	8,558	56,304	9.9%	32.7%	30.1%	205.7	641.7	5.9%
Business, Fin. & Other Services	1,363	7,730	9.1%	79.7%	61.6%	206.3	242.7	0.8%

The total value added of foreign-owned Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €120.6 billion in 2020.

Although total value added grew at a rate of 6.5% per annum in nominal terms over the period 2000-2020, there are differences at sectoral level. There was growth of 9.8% per annum in value added in the Information, Communication and Other Internationally Traded Services sectors over this period and growth of 4.3% per annum in the manufacturing sectors.

Across all foreign-owned sectors, value added as a percentage of sales has dropped from 42.3% in 2000 to 39.3% in 2020.

Overall, value added per person employed in Manufacturing and Information, Communication and Other Internationally Traded Services is estimated at €552.9 in 2020, an increase of 5.2% 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 2020

	Total Payroll			Payroll per Employee		
	2000	2020	Per annum change 2000-20	2000	2020	Per annum change 2000-20
	€m	€m	€m	€k	€k	%
Total - All Sectors	6,269	17,431	5.2%	61.7	79.9	1.3%
<b>Manufacturing &amp; Other Industry</b>	<b>4,343</b>	<b>7,270</b>	<b>2.6%</b>	<b>35.1</b>	<b>74.4</b>	<b>3.8%</b>
Food, Drink & Primary Production	462	545	0.8%	39.5	74.1	3.2%
Traditional Manufacturing	1,232	995	-1.1%	35.7	57.5	2.4%
Chemicals	952	2,547	5.0%	42.1	93.7	4.1%
Computer Electronic Optical	1,224	1,049	-0.8%	37.9	81.7	3.9%
Medical Devices	436	2,077	8.1%	28.5	65.2	4.2%
Electrical Equipment	160	71	-4.0%	25.5	63.7	4.7%
Energy, Water, Waste, Construction	36	56	2.2%	44.9	108.6	4.5%
<b>Info./ Comm./Other Services</b>	<b>1,926</b>	<b>10,161</b>	<b>8.7%</b>	<b>40.0</b>	<b>84.4</b>	<b>3.8%</b>
Information, Comm. & Computer	1,682	7,485	7.8%	40.4	84.5	3.8%
Business, Financial & Other	244	2,676	12.7%	36.9	84.0	4.2%

The total payroll bill of foreign-owned firms amounted to €17.4 billion in 2020 with manufacturing accounting for €7.3 billion (41.7%) and services contributing the balance of €10.1 billion (58.3%).

Total payroll per person employed averaged €79,928 in 2020, representing an increase of 1.3% per annum in nominal terms over the period 2000-2020.

Payroll per employee in the Information, Communication and Other Internationally Traded Services sector and the Manufacturing sectors averaged €84,387 and €74,431 respectively in 2020.

The Chemicals sector had the highest average payroll per capita of all sectors in 2020 at €93,671, followed by Information, Communications and Computer Services with €84,513 and Business, Financial and Other Services at €84,035.

#### 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, 2020

	Materials Purchased 2020			Services Purchased 2020		
	Total Materials	Irish Materials	Irish as % of Total	Total Services	Irish Services	Irish as % of Total
	€m	€m	%	€m	€m	%
Total - All Sectors	28,302	3,447	12.2%	157,800	8,954	5.7%
<b>Manufacturing &amp; Other Industry</b>	<b>19,402</b>	<b>2,977</b>	<b>15.3%</b>	<b>31,318</b>	<b>2,995</b>	<b>9.6%</b>
Food & Drink	1,720	735	42.7%	1,861	503	27.0%
Traditional Manufacturing	2,977	395	13.3%	924	368	39.8%
Chemicals	8,755	487	5.6%	23,487	1,335	5.7%
Computer/Electronic/Optical Prod.	2,648	494	18.6%	1,990	206	10.4%
Medical Devices	3,057	866	28.3%	3,011	566	18.8%
Electrical Equipment	322	14	4.3%	18	10	55.7%
Energy, Water, Waste, Construction	245	-	0.0%	45	17	37.7%

<b>Infor./Comm. &amp; Other Services</b>	<b>8,899</b>	<b>470</b>	<b>5.3%</b>	<b>126,482</b>	<b>5,959</b>	<b>4.7%</b>
Information, Comm. & Computer	8,041	301	3.7%	122,524	5,017	4.1%
Business/Financial & Other Services	859	169	19.7%	3,958	942	23.8%

In overall terms, foreign-owned sector spent €28.3 billion on materials, of which €3.4 billion or 12.2% relates to materials sourced in Ireland (either by indigenous suppliers or other foreign-owned multinationals in the country).

- The largest proportion of Irish-sourced materials is found in the Food, Drink & Primary Production sector where 42.7% of all materials purchased were sourced in Ireland. In monetary terms, this amounted to €735 million spent in Ireland in 2020.
- The Medical Devices sector sourced 28.3% of their materials in Ireland.

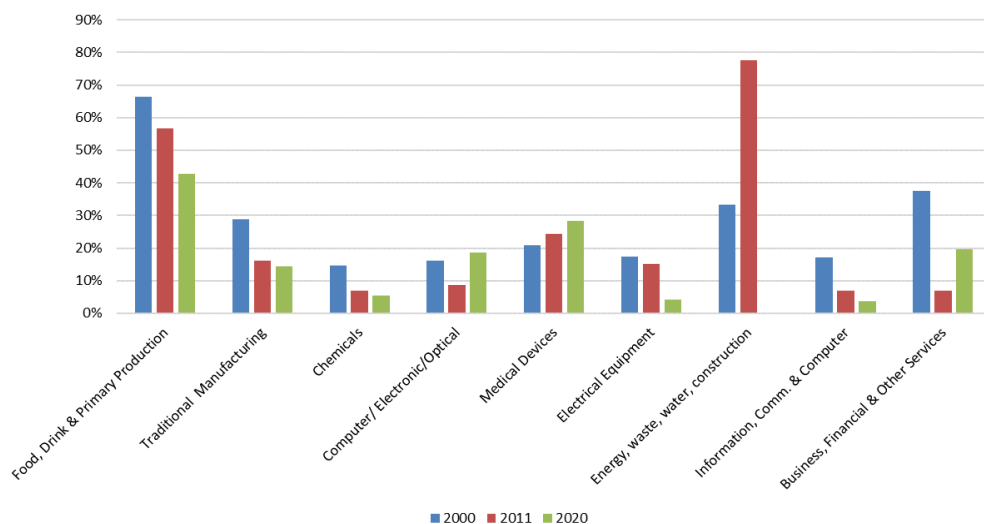
Foreign-owned sector spend on services sourced in Ireland amounted to €8.9 billion in 2020 or 5.7% of total services. The total spends on services amounted to €157.8 billion - it should be noted that this figure includes royalty payments.

- The services sector with the highest spend on Irish services was the Information, Communication and Computer sector which spent €5.0 billion or 4.1% of a total spend of €122.6 billion on services in 2020.
- Traditional Manufacturing had the highest proportion on Irish-sourced services at 39.8% 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, 2000-2020**



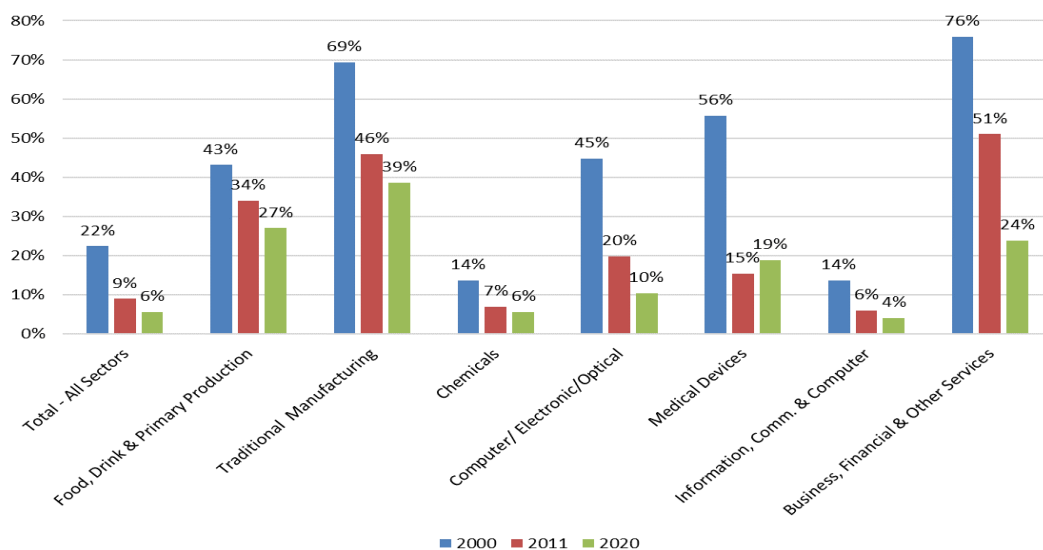
This graph depicts trends in the share of materials purchased by foreign-owned companies that were sourced in Ireland. The trend in the share of materials purchased in Ireland was in decline for all sectors between 2000 and 2011 falling from 20% to 13%. It has since fallen further and now stands at 12% in 2020.

The sector with the largest share of materials purchased in Ireland is the Food & Drink sector with 43%, though this share has dropped from 66% in 2000. (Absolute value €735.3m).

The Traditional Manufacturing sector’s share of Irish materials has decreased steadily over the period of this time-series from 29% in 2000 to 14% in 2020. (Absolute value €380.9).

The one sector that has increased its share of Irish materials between 2000 and 2020 is the Medical Devices sector going from 21% to 28% (Absolute value was €866.9m).

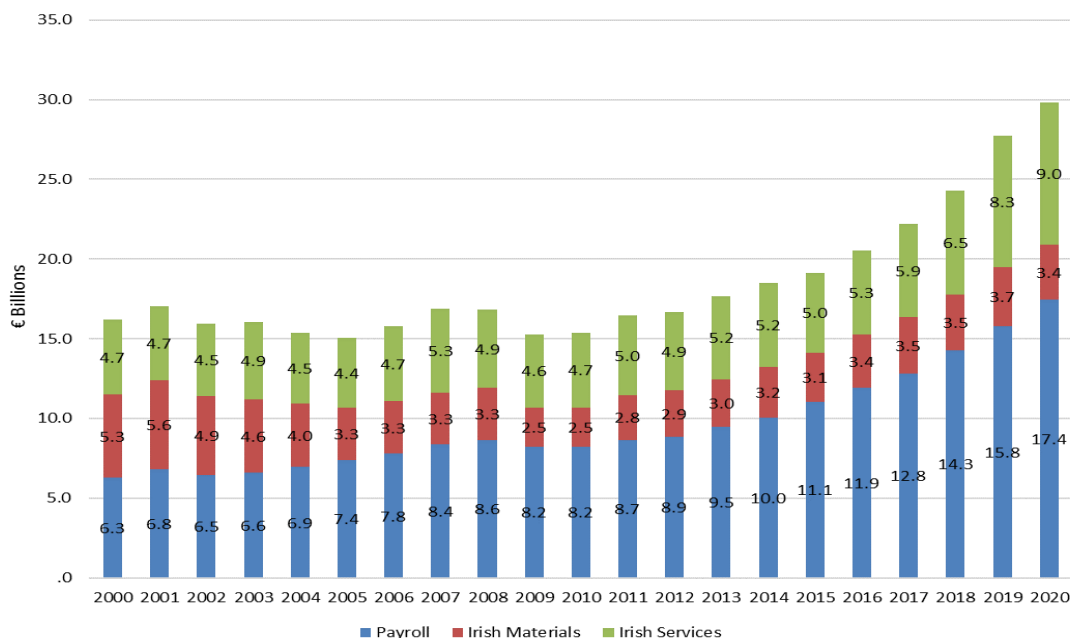
**3.11 Irish-Sourced Services as a Share of All Services Purchased by Foreign-Owned Companies, 2000-2020**



This graph shows the share of total services sourced in Ireland by foreign-owned Manufacturing and Services firms. In 2000, 22% of all services purchased by foreign-owned firms were sourced in Ireland - this figure has declined to 6% in 2020.

- Traditional Manufacturing dropped its share of Irish service purchases from 69% in 2000 to 39% in 2020 but remains the highest performing sector as regards Irish-sourced services. (Absolute value was €357.3 million).
- The Medical Devices sector’s share of services sourced in Ireland dropped from 56% in 2000 to 19% in 2020. (Absolute value was €566.2 million).
- The Computer, Electronic and Optical Products sector has also decreased its share of Irish services purchases from 45% in 2000 to 10% in 2020. (Absolute value €206.3 million).
- The Information, Communications and Computer Services sector’s share of service purchases sourced in Ireland fell from 14% in 2000 to 4% in 2020. (Absolute value 5.1 billion 2020).
- The Food & Drink sector declined from the 2000 figure of 43% to 27% in 2020 (Absolute value €503.1 million).
- The percentage of Irish services purchased by the Chemical sector dropped from 14% in 2000 to 6% in 2020. (Absolute value €1.3 billion).

**3.12 Total Direct Expenditure in the Irish Economy by Foreign-Owned Companies, 2000-2020**



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 €29.8 billion in 2020, comprising €17.4 billion on payroll, €3.4 billion on materials produced in Ireland and €9.0 billion on services purchased in Ireland.

- Direct expenditure by foreign-owned firms was up 7.5% in 2020 from €27.7 billion in 2019.
- Direct expenditure has increased from €16.2 billion in 2000 and shows an overall nominal per annum increase of 3.1% per annum between 2000 and 2020.
- Over the period 2000 to 2020:
  - Payroll has increased by 5.2% per annum;
  - Expenditure on materials sourced in Ireland has decreased by 2.1% per annum;
  - Expenditure on services sourced in Ireland has increased by 3.3% per annum.

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

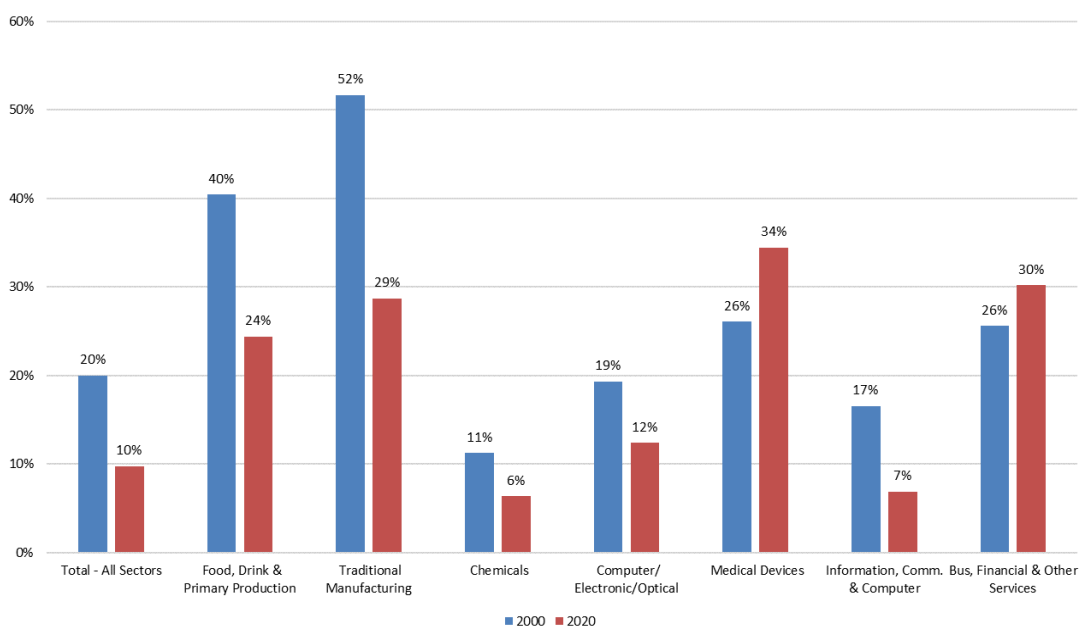
- In 2000 payroll made up 39%, Irish materials 32% and Irish services 29% of total Irish economy expenditure;
- In 2020, payroll accounts for 57% of total expenditure in the Irish economy, with Irish materials and Irish services accounting for 13% and 30% respectively.



**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, 2000-2020**



is

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 2000-2020.

For all sectors combined, the results show that direct expenditure in the Irish economy as a percentage of sales has decreased from 20% in 2000 to 10% in 2020.

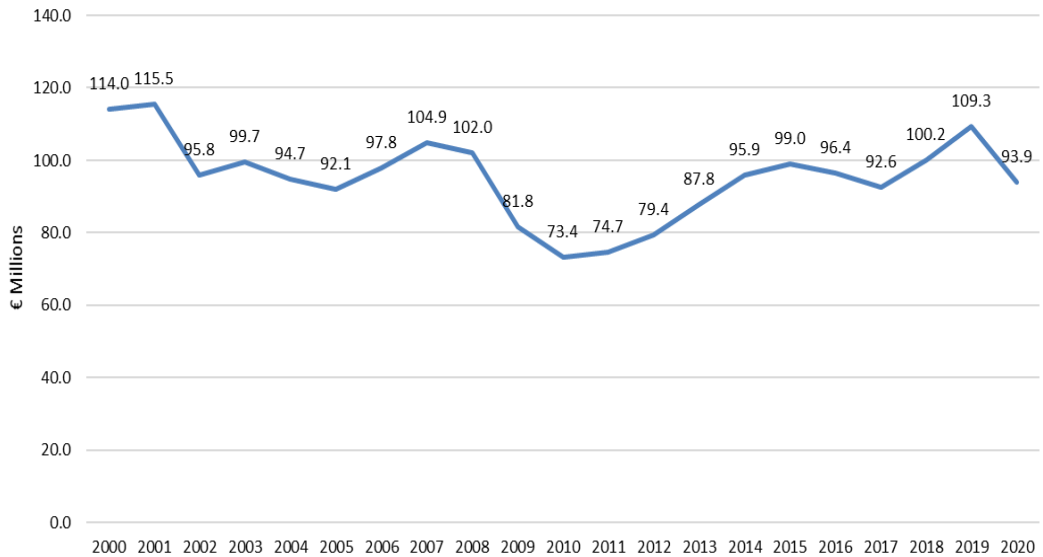
Medical Devices is the only sector to have gone against this aggregate trend. For Medical Devices DEIE/Sales has increased from 26% in 2000 to 34% in 2020 (Value €3.5 billion).

The Information, Communication and Computer Services Sector decreased its Direct Expenditure as a percentage of sales from 17% in 2000 to 7% in 2020. In absolute terms this is the sector with the greatest direct expenditure in the Irish economy with a spend of €12.8 billion in 2020 accounting for 42.1% of total direct expenditure by foreign firms in the economy in 2020.

The next highest contributor in absolute terms is the Chemicals sector with a total expenditure of €4.4 billion in 2020. This represents 14.6% of total direct expenditure by foreign firms in the economy in 2020.

Direct Expenditure in Traditional Manufacturing has fallen from 52% in 2000 to 29% in 2020. In absolute terms total expenditure stood at €1.8 billion in 2020.

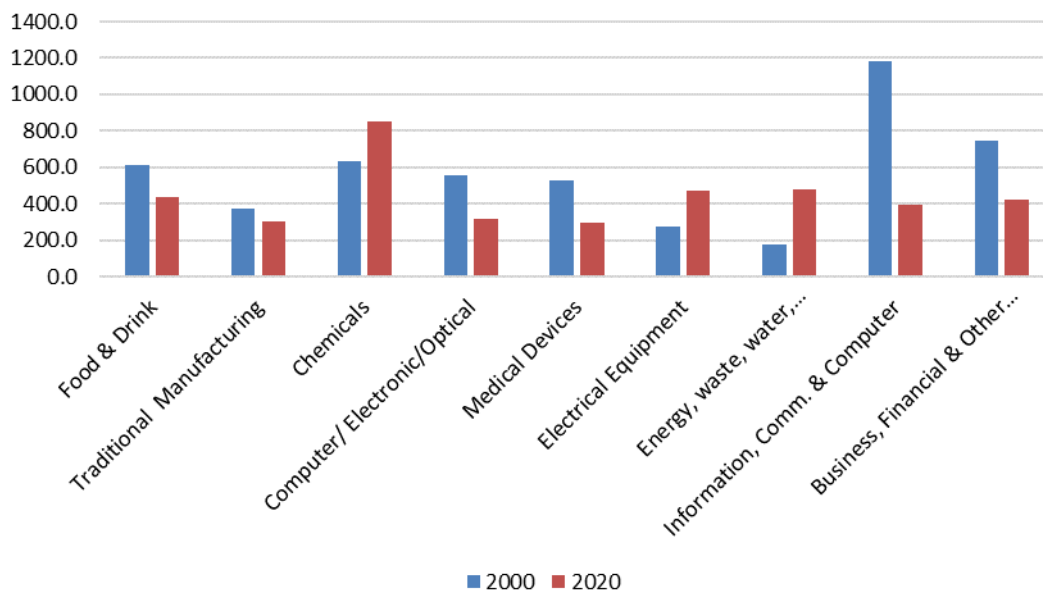
**3.14 Formal Structured Training in Foreign-owned Companies, 2000-2020**



Total expenditure on structured, formal training in foreign-owned companies in 2020 amounted to €93.9 million, a decrease of 14.1%. Expenditure on training increased between 2010 and 2015 from a low of €73.4 million in 2011 to reach €99.0 million in 2015. It decreased again to €92.6m in 2017 but has recovered over the two subsequent years with a decrease of 14.1% over 2019.

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

Formal Structured Training per person employed in Foreign-owned Companies by Sector, 2000-2020



- The Manufacturing sectors spent €45.5 million or 48.4% of total expenditure on structured training in foreign-owned companies.
  - Within Manufacturing, the chemicals sector is responsible for 51.1% of this expenditure in 2020 at €23.2 million.
- The Services sectors spend on training in 2020 was €48.4 million.
  - The IT services sector spends most on training within Services with €34.8m in 2020 or 71.9% of total services spend in that year.
- Overall expenditure on training per person employed in foreign-owned companies decreased by from €663.6 in 2000 to €430.5 in 2020.
- The sector with the biggest decline in expenditure on training per person employed was IT Services which declined from €1,119.4 in 2000 to €402.1 in 2020, a drop of 64%. Business, Financial and Other Services declined from €746.4 in 2000 to €426.5 in 2020, a decline of 42.8%. Food & Drink declined from €616.5 in 2000 to €436.5 in 2020, a decline of 29.1%.

## Appendix 1: NACE Codes Used in Report

The classification of economic activity used in the Annual Business Survey of Economic Impact is the European industrial activity classification NACE Rev.2<sup>8</sup>. (Nomenclature statistique des Activités économiques dans la Communauté Européenne)

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

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

#### **Manufacturing and Other Industry**

##### **Food/Drink & Primary Production:**

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

##### **Traditional Manufacturing:**

- textiles, clothing, footwear & leather (13-15); wood & wood products (16); paper & printing (17-18), rubber & plastics (22), non-metallic minerals (23), basic & fabricated metal products (24-25), electrical equipment (27), machinery & equipment (28), transport equipment (29-30) and other miscellaneous manufacturing (31-33 exc. 32.5).

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

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

#### **Energy, Water, Waste & Construction**

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

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

##### **Information, Communication & Computer:**

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

##### **Business, Financial & Other Services:**

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

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

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

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<sup>8</sup> NACE Rev 2 – For more detail on NACE codes go to the Central Statistics Office web-site:

<sup>9</sup> Please note that the ABSEI tracks only Agency client companies' performance and is not meant to be a snapshot of the national economy. In some instances, when analysing sectorial performance, there will be a wide disparity between national (e.g. Central Statistics Office) sectoral data and ABSEI sectoral data because the agency cohort of companies may represent a small proportion of the national sector - the Financial Services sector is an example of this.

## Appendix 2: Schedule of Services Industries

S.I. No. 81/2010 - Industrial Development (Service Industries) Order 2010<sup>10</sup>.

This Order sets out those service industries that are eligible for assistance under the Industrial Development Acts, 1986 to 2010:

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

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<sup>10</sup> <http://www.irishstatutebook.ie/eli/2010/si/81/made/en/print>

## Appendix 3: Sample Questionnaires Enterprise Ireland Questionnaire



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

### Annual Business Report 2020/2021

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

Please return a completed form via e-mail to [abr@insightsc.ie](mailto:abr@insightsc.ie)



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

#### SALES AND EXPORTS

**Q1 - Please record in thousands of Euro (€000's) the total value of your Sales & Exports for each year:**  
If using accounting year (rather than calendar year) provide date of year-end: \_\_\_\_\_

	Actual 2019 (€000's)	Actual 2020 (€000's)	Forecast 2021 (€000's)
<b>Q1a - DOMESTIC SALES</b>			
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.*

<b>Q1b - EXPORT SALES</b>			
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)      €       €       €

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

	2019	2020	2021
<b>Q1d - DOMESTIC SALES TO PUBLIC SECTOR</b>	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
<i>Estimated percentage of domestic sales in Q1a attributed to the public sector.</i>			
<b>Q1e - DOMESTIC SALES TO FOREIGN OWNED COMPANIES BASED IN IRELAND</b>	<input type="text"/> %	<input type="text"/> %	<input type="text"/> %
<i>Estimated percentage of domestic sales (Manufactured goods + Services) in Q1a made to foreign owned companies based in the Republic of Ireland.</i>			

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

	Actual 2019	Actual 2020	Forecast 2021
<b>Q1f2 - GLOBAL SALES</b>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

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

**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 (%) IN 2020**       %

*What proportion of the value of sales in 2020 was accounted for by products which were introduced by the company over the last 3 years, i.e. by products which were substantially different to those previously supplied by your company?*

Please ensure that all monetary amounts are in thousands

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

**EXPORT MARKETS**

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

**Q2b** - Please provide a breakdown of your exports in 2019, 2020 and your forecasted exports 2021. Please note that the total of these figures should be the same as those outlined in Q1b.

	Actual 2019 (€000's)	Actual 2020 (€000's)	Forecast 2021 (€000's)		Actual 2019 (€000's)	Actual 2020 (€000's)	Forecast 2021 (€000's)
England & Wales				Bahrain			
Northern Ireland				Egypt			
Scotland				Ghana			
<b>UK</b>				Israel			
				Jordan			
Austria				Kenya			
Belgium/Luxembourg				Kuwait			
Bulgaria				Libya			
Croatia				Morocco			
Cyprus				Nigeria			
Czech Republic				Oman			
Denmark				Qatar			
Estonia				Saudi Arabia			
Finland				South Africa			
France				Tunisia			
Germany				UAE			
Greece				<b>M. EAST &amp; AFRICA</b>			
Hungary							
Iceland				Afghanistan			
Italy				Australia			
Latvia				Bangladesh			
Lithuania				China			
Malta				Hong Kong			
Netherlands				India			
Norway				Indonesia			
Poland				Iran			
Portugal				Japan			
Romania				Malaysia			
Russia				Myanmar			
Slovakia				New Zealand			
Slovenia				Pakistan			
Spain				Philippines			
Sweden				Singapore			
Switzerland				South Korea			
Turkey				Taiwan			
Ukraine				Thailand			
<b>EUROPE</b>				Vietnam			
				<b>ASIA</b>			
Argentina				<b>Other Markets</b> - use separate sheet if necessary			
Brazil							
Canada							
Chile							
Colombia							
Mexico							
Peru							
Uruguay							
USA							
Venezuela							
<b>AMERICAS</b>				<b>OTHER MARKETS</b>			
				<b>TOTAL MARKETS</b>			

**Q2c** - Please specify your top three priority development markets in 2021, i.e. by country.

Please ensure that all monetary amounts are in thousands

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1)  2)  3)

**Q2d** - Please list the markets where you had a **physical presence in 2020** (i.e. an office or staff permanently located there).

**Q2e** - Please list the markets where you are planning a **new physical presence in 2021** (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 2019	Actual 2020	Forecast 2021
<b>Full-Time:</b> Employed on a full-time basis for at least nine months with the exception of agency workers (see Q3b)	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Other:</b> All other employees with the exception of agency workers (see Q3b), can be part-time, short-term, temporary or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL COMPANY STAFF</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**TEMPORARY/EMPLOYMENT WAGE SUBSIDY SCHEME (T/EWSS)**

Has your company availed of the Temporary/Employment Wage Subsidy [Scheme](#)

(T/EWSS) during Covid?

Yes  
 No  
 Don't know

How many employees were supported under the EWSS on the 31/12/2020?

**FEMALE STAFF**

Proportion of female staff in your total company staff in 2020

 %

Is the CEO of your company female?

Yes  
 No

Is the Chair of your Board female?

Yes  
 No

**MANAGEMENT TEAM**

How many people are there on your management team in 2020 (including CEO, senior and middle management)?

How many of the management team are female?

How many new appointments did you make to your management team in 2020?

How many of the new appointments were female?

**BOARD MEMBERS**

How many people are there on your Board @ 31/12/2020?

How many of the Board are female?

**Q3b - AGENCY STAFF**

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

	Actual 2019	Actual 2020	Forecast 2021
<b>Full-Time:</b> Employed on a full-time basis for at least nine months	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Other:</b> All other classification of agency worker, can be part-time, short-term, temporary or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL AGENCY STAFF</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please ensure that all monetary amounts are in thousands



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**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 2019	Actual 2020	Forecast 2021
<b>Full-Time Employees Only:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please ensure that all monetary amounts are in thousands

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**EXPENDITURE ITEMS**

	<b>Actual 2019 (€000's)</b>	<b>Actual 2020 (€000's)</b>
<b>Q4 - PAYROLL</b>	€ <input type="text"/>	€ <input type="text"/>
<i>Wages, salaries, pensions and other payroll costs for company staff (see total company staff above) within the Republic of Ireland [include all bonuses, PRSI, other taxes and levies but exclude redundancy payments, Government employment subsidies and recruitment agency fees].</i>		
<b>Please record in Q5 to Q8 the costs associated with total sales excluding cost of distribution sales (Q1g).</b>		
<b>Q5a - MATERIALS</b>	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of materials and components used directly in the production of goods and services [exclude goods purchased for re-distribution only or any capital expenditure and include material-based RD&amp;I costs]</i>		
<b>Q5b - MATERIALS SOURCED IN IRELAND (%)</b>	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of materials and components in Q5a produced in Republic of Ireland.</i>		
<b>Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)</b>	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of materials and components in Q5a sourced in the UK</i>		
	<b>Actual 2019 (€000's)</b>	<b>Actual 2020 (€000's)</b>
<b>Q6a - SERVICES</b>	€ <input type="text"/>	€ <input type="text"/>
<i>Cost of all bought-in services, <u>e.g.</u> agency fees, professional fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services etc.</i>		
<b>Q6b - SERVICES SOURCED IN IRELAND (%)</b>	<input type="text"/> %	<input type="text"/> %
<i>Estimated proportion of services in Q6a sourced in Republic of Ireland.</i>		
<b>Q6c - ENERGY</b>	€ <input type="text"/>	€ <input type="text"/>
<i>Cost within Q6a accounted for by fuel and power, <u>e.g.</u> electricity, gas, oil, etc.</i>		
<b>Q7a - ROYALTIES</b>	€ <input type="text"/>	€ <input type="text"/>
<i>Estimated value of royalty payments, <u>i.e.</u> 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>		
<b>Q7b - ROYALTIES PAID IN IRELAND (%)</b>	<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>		
<b>Q8 - ALL OTHER EXPENSE ITEMS</b>	€ <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 (<u>e.g.</u> rent, leasing costs, interest payments and depreciation).</i>		
	<b>Actual 2019 (€000's)</b>	<b>Actual 2020 (€000's)</b>
<b>Q9a - GROSS PROFIT - As per your Profit and Loss Account</b>	€ <input type="text"/>	€ <input type="text"/>
<b>Q9b - NET PROFIT BEFORE TAX - As per your Profit &amp; Loss Account</b>	€ <input type="text"/>	€ <input type="text"/>

**TRAINING**

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

	<b>Actual 2019 (€000's)</b>	<b>Actual 2020 (€000's)</b>
<b>Q10 - TRAINING</b>	€ <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>		

Please ensure that all monetary amounts are in thousands

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**CORPORATION TAX**

**Q11 - Corporation Tax**

Did (or will) your company pay Corporation Tax in Ireland from 2019-2022?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid):
	Yes	No	Amount (€000's)
2019 (actual)			
2020 (estimate)			
2021 (forecast)			
2022 (forecast)			

**RESEARCH, DEVELOPMENT & INNOVATION**

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

<b>Q12a - IN-HOUSE RD&amp;I (NUMBER EMPLOYED)</b>	<b>Actual 2019</b>	<b>Actual 2020</b>
	<input type="text"/>	<input type="text"/>

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

<b>Q12b - RD&amp;I EXPENDITURE (IN-HOUSE)</b>	<b>Actual (€000's)</b>	<b>Actual (€000's)</b>
	€ <input type="text"/>	€ <input 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.

<b>Q12c - RD&amp;I EXPENDITURE (OUTSOURCED)</b>	€ <input type="text"/>	€ <input type="text"/>
---	------------------------	------------------------

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

<b>Q12d - OVERALL RD&amp;I EXPENDITURE</b>	€ <input type="text"/>	€ <input type="text"/>
--	------------------------	------------------------

Please combine Q12b and Q12c

<b>Q12e - EXPECTED OVERALL RD&amp;I EXPENDITURE IN 2021</b>	€ <input type="text"/>
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**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:

	2018	2019	2020
Yes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Q12g - INTELLECTUAL PROPERTY**

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

- Patent(s) within the last 20 years
- Registered design(s)
- Registered trademark(s)
- Trade secret(s)
- Web Presence/Website name(s)
- Licensed intellectual property from a third party
- Copyright
- Don't know

Please ensure that all monetary amounts are in thousands

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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 2020?

- Yes
- No
- Don't Know

**Q12i2 -** If Yes, 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	ICT
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Future Networks, <del>Communications</del> and Internet of Things
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security, Privacy, Robotics and Artificial Intelligence (Including Machine Learning)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content and Applications, and Augmented Reality and Virtual Reality
1	2	3	Health and Wellbeing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connected Health and Independent Living
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Devices
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagnostics
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Therapeutics
1	2	3	Food
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food for Health
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smart and Sustainable Food Production and Processing
1	2	3	Energy, Climate Action and Sustainability
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<del>Decarbonising</del> the Energy System
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Living
1	2	3	Manufacturing and Materials
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced and Smart Manufacturing
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing and Novel Materials
1	2	3	Services and Business Processes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Innovation in Services and Business Processes

Please ensure that all monetary amounts are in thousands

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

**GREEN TRANSFORMATION & DIGITISATION**

**Q14a** - How important is having a climate action response for your business?

- Not important
- Moderately important
- Very important

**Q14b** - Have you developed a climate action response for your business?

- Yes
- No
- Don't know

**Q14c** - Does your company measure CO2 emissions?

- Yes
- No
- Don't know

**Q14d** - Which of the following energy resources does your company use?

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

**Q15** - Digitalisation is the process of leveraging digital data and technologies to drive business value. How would you assess your readiness for the use of established (e.g. data analytics) and emerging (e.g. Artificial Intelligence) digital technologies to this end? Please tick one of the following options:

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

**BREXIT**

**Q16** - Please rank the top five challenges your business faced following Brexit, where 1 is the most important:

- Customs procedures and processes
- Transport and logistics costs
- Supply chain issues
- Pressure on cashflow
- Changes in regulation / certification
- Competitive issues
- Other - please specify: .....
- Not relevant to my company

**Q17** - How does your company plan to respond to the changes posed by Brexit during 2021? Please tick all that apply.

- Seek opportunities to build greater scale in the UK
- Diversify into other markets
- Improving overall competitiveness
- Restructure your business
- Other - please specify: .....
- Not relevant to my company

Please ensure that all monetary amounts are in thousands

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**LOOKING TO THE FUTURE**

**Q18** – Please list your top 3 geographical growth markets in the next 3 to 5 years?

1)  2)  3)

**Q19** – Please rank the top 5 issues facing your company in the medium term (i.e. the next 3-5 years), where 1 is the most important:

Rank	Issue
	Significant disruption to your sector/business model
	Access to overseas markets
	Changed trading relationship with the UK
	Supply chain management
	Availability of finance
	Availability of labour/key skills
	Cyber security
	Business taxation
	Low carbon transition
	Technological change
	Changes in customer demand
	Changes in workplace structure (remote working)
	Other- Please Specify:

**Q20** – Please describe any new Enterprise Ireland initiatives which could assist you in addressing the issues outlined in Question 19 above.

**OTHER COMPANIES INCORPORATED IN THIS RETURN**

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

Company Name(s)	Address(es)

**Thank you very much!**

Please return the completed form via secure online portal (or e-mail to [abr@insightsc.ie](mailto:abr@insightsc.ie))

Please ensure that all monetary amounts are in thousands



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

## Annual Business Report 2020/21

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



Please return a completed form via e-mail to [abr@insightsc.ie](mailto:abr@insightsc.ie)

**Ref no:**

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

### REVENUES

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

If not using Euro in this form please indicate other currency used:

**Q1 - Please record in thousands the total value of your Export and Domestic Revenues each year:**

	Actual 2019 (€000's)	Actual 2020 (€000's)	Forecast 2021 (€000's)
<b>EXPORT REVENUES</b>			
Q1a1) <u>MANUFACTURED GOODS</u>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1a2) <u>SERVICES</u>	€ <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](#).

<b>DOMESTIC REVENUES</b>			
Q1b1) <u>MANUFACTURED GOODS</u>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
Q1b2) <u>SERVICES</u>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>

Sales of manufactured goods produced and services provided by your enterprise for the Domestic (Republic of Ireland) market, i.e. the value excluding excise duties and VAT. Distribution sales should be excluded and provided in Q1g below. For a service-type activity such as a call centre, please include the fee income earned by the Republic of Ireland operation rather than the value of all the transactions handled by the call centre.

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

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

Q1e - <u>INTER-COMPANY REVENUES</u>	<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 - <u>GLOBAL REVENUES</u>	<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 - <u>DISTRIBUTION REVENUES</u>	€ <input type="text"/>	€ <input type="text"/>	€ <input type="text"/>
------------------------------------	------------------------	------------------------	------------------------

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

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**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:

	2019		2020	
	Goods	Services	Goods	Services
United Kingdom (inc. Northern Ireland)	%	%	%	%
Other EU Countries*	%	%	%	%
Other European Countries	%	%	%	%
North America, i.e. USA and Canada	%	%	%	%
Asia	%	%	%	%
Elsewhere	%	%	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* 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 2019	Actual 2020	Forecast 2021
<b>Full-Time:</b> Employed on a full-time basis (or on a contract of at least nine months) <u>with the exception of</u> agency workers.			
<b>Other:</b> All other employees <u>with the exception of</u> agency workers, can be part-time, short-term, temporary or other.			
<b>TOTAL COMPANY STAFF</b>			
<b>% Company Staff Earning €40,000+ per annum</b>	%	%	%

**TEMPORARY/EMPLOYMENT WAGE SUBSIDY SCHEME (T/EWSS)**

Has your company availed of the Government Temporary/Employment Wage Subsidy Scheme (T/EWSS) during the Coronavirus pandemic?

- Yes
- No
- Don't know

How many employees were supported under the EWSS on the 31/12/2020?

**FEMALE STAFF**

Proportion of female staff in your Irish operation @ 31/12/20

 %

Is the Head/Managing Director in Ireland female?

- Yes
- No

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

- Yes
- No
- Not Applicable

**Senior Leadership Team**

How many people are there on your Senior Leadership team in Ireland in 2020? (including Managing Director, Executive Level and middle management/Senior Vice President)?

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

How many new appointments did you make to your Senior Leadership team in 2020?

Please ensure that all monetary amounts are in thousands



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➤ How many of the new appointments were female?

**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 2019	Actual 2020	Forecast 2021
<b>Full-Time:</b> Employed as an agency worker on a full-time basis (or on a contract of at least nine months).	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Other:</b> All other classification of agency worker, can be part-time, short-term, temporary or other.	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>TOTAL AGENCY STAFF</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Q3c - GLOBAL EMPLOYMENT</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

**CURRENT EXPENDITURE**

**Q4 - PAYROLL** Actual 2019 (€000's)  Actual 2020 (€000's)   
 Wages, salaries, pensions and other payroll costs for employees within the Republic of Ireland (include all bonuses, PRSI, other taxes and levies but exclude redundancy payments and agency staff payroll costs).  
 Please record costs associated with total sales excluding cost of distribution sales (Q1g).

**Q5a - MATERIALS** €  €   
 Cost of materials and components used directly in the production of goods and services (exclude goods purchased for re-distribution only or any capital expenditure).

**Q5b - MATERIALS SOURCED IN IRELAND (%)**  %  %  
 Estimated proportion of materials and components in Q5a sourced in Republic of Ireland.

**Q5c - MATERIALS SOURCED FROM UNITED KINGDOM (%)**  %  %  
 Estimated proportion of materials and components in Q5a sourced in the UK

**Q6a - SERVICES not including Royalties** €  €   
 Cost of all bought-in services, e.g. agency fees, advertising, transport, fuel, power, repairs, telephone, postage, stationery, computing services, professional fees etc.

**Q6b - SERVICES SOURCED IN IRELAND not including Royalties (%)**  %  %  
 Estimated proportion of services in Q6a sourced in Republic of Ireland.

**Q6c - ENERGY** €  €   
 Cost within Q6a accounted for by fuel and power, e.g. electricity, gas, oil, etc.

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

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

**Q7a - ROYALTIES (not to be included in Q6a-Services above)** €  €   
 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)

Please ensure that all monetary amounts are in thousands

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**QB - ALL OTHER EXPENSE ITEMS**

€  €

*Sum of all other expense items appearing in Profit and Loss Account of your Republic of Ireland operation (e.g. rent, leasing costs, interest payments, depreciation and foreign exchange costs etc.).*

Please ensure that all monetary amounts are in thousands

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**TRAINING**

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

**Q9 - TRAINING** Actual 2019 €  Actual 2020 €

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

**CAPITAL EXPENDITURE**

**Q10 - CAPITAL EXPENDITURE** Actual 2019 (€000's) €  Actual 2020 (€000's) €

*Please outline the cost of any expenditure on fixed assets (Le. assets with a useful life extending beyond the taxable year) associated with the companies' operation in the Republic of Ireland. You should include in the appropriate category leased items of fixed capital where the lease is on a financial basis, exclude operational leases.*

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

	2019	2020
Building & Structures	%	%
Machinery & Equipment	%	%
Other	%	%
<b>Total</b>	<b>100%</b>	<b>100%</b>

**CORPORATION TAX**

**Q11 - Corporation Tax**

Did (or will) your company pay Corporation Tax in Ireland from 2019-2022?

Year	Payment of Corporation Tax?		Estimate of total net tax paid (or to be paid): Amount (€000's)
	Yes	No	
2019 (actual)			
2020 (estimate)			
2021 (forecast)			
2022 (forecast)			

Please ensure that all monetary amounts are in thousands

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**RESEARCH, DEVELOPMENT & INNOVATION**

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

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

**Q12a1 - RESEARCHERS/TECHNICIANS**

Actual 2019	Actual 2020
<input type="text"/>	<input type="text"/>

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

**Q12a2 - SUPPORT STAFF**

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

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

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

€ (C000's)	€ (C000's)
<input type="text"/>	<input 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 type="text"/>	€ <input type="text"/>
------------------------	------------------------

Please estimate the total expenditure incurred by your Republic of Ireland operation on RD&I sub-contracted to other parties. The RD&I costs should also appear in the relevant sections of expenditure items in this review, [i.e.](#) Q4-Q9.

**Q12d - OVERALL RD&I EXPENDITURE**

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

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

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

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

If your company is part of a larger group with a manufacturing and/or other facility OUTSIDE the Republic of Ireland, [i.e.](#) global sales at Q1f, what proportion (%) of your global RD&I expenditure does your RD&I expenditure from Ireland (as outlined in Q12d above) represent?

**Q12f - RD&I TAX CREDITS**

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

	2018	2019	2020
Yes	<input type="text"/>	<input type="text"/>	<input type="text"/>
No	<input type="text"/>	<input type="text"/>	<input type="text"/>

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**Q12g - IRISH KNOWLEDGE DEVELOPMENT BOX**

The Knowledge Development Box (KDB) was introduced by Finance Act 2016 for companies whose accounting period commences on or after 1 January 2020. 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~~ **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~~ **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

**Q12h - INTELLECTUAL PROPERTY**

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

- Patent(s)
- Registered design(s)
- Registered trademark(s)
- Trade secret(s)
- Web domain name(s)
- Licensed intellectual property from a third party
- Copyright
- Don't know
- 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 2020?

- Yes
- No
- Don't Know

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


Please ensure that all monetary amounts are in thousands

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**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, <del>Communications</del> and Internet of Things
b-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Data Analytics, Management, Security, Privacy, Robotics and Artificial Intelligence ( <del>including</del> Machine Learning)
c-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Digital Platforms, Content and Applications, and Augmented Reality and Virtual Reality
d-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Connected Health and Independent Living
e-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Devices
f-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diagnostics
g-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Therapeutics
h-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Food for Health
i-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Food Production and Processing
j-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<del>Decarbonising</del> the Energy System
k-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sustainable Living
l-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Advanced and Smart Manufacturing
m-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing and Novel Materials
n-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Innovation in Services and Business Processes

Further Information on the Priority Areas is available [here](#).

**IMPACT OF BREXIT**

**Q14a** - Overall, how has Brexit impacted your business?

<input type="checkbox"/>	Positively
<input type="checkbox"/>	Negatively
<input type="checkbox"/>	Neither

**Q14b** - If your business has been negatively impacted, please rank the top five challenges, where 1 is the most important:

<input type="checkbox"/>	Customs procedures and processes
<input type="checkbox"/>	Transport and logistics costs
<input type="checkbox"/>	Supply chain issues
<input type="checkbox"/>	Pressure on people/staff hiring
<input type="checkbox"/>	Changes in regulation / certification
<input type="checkbox"/>	Competitive issues
<input type="checkbox"/>	Other - please <u>specify</u> : .....
<input type="checkbox"/>	Not relevant to my company

**SUSTAINABILITY**

**Q15a** - Do you measure the CO2 emissions from your operation in Ireland, e.g. operations, buildings, transport / travel?

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

**Q15b** - Have you developed a climate action response/plan for your business in Ireland?

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

Please ensure that all monetary amounts are in thousands