



Diversification – UK / Eurozone



BUILD SCALE

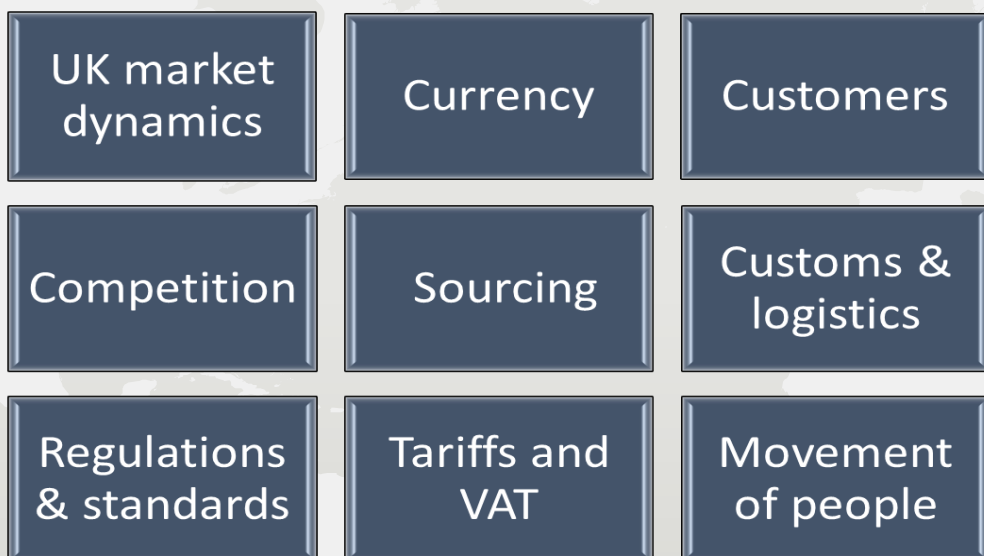


EXPAND REACH



**DELIVER
GLOBAL AMBITION**

Assess areas of potential risk



Brexit Scorecard



www.prepareforbrexit.ie



Prepare For Brexit

The UK is still our trading partner

GOODS

EXPORTS

€15.6 billion
OF GOODS
TO THE UK

IMPORTS

€18.0 billion
OF GOODS
FROM THE UK

MIGRATION

IMMIGRANTS FROM UK IN 2016
13,800 persons

EMIGRANTS TO THE UK IN 2016
16,600 persons



FOREIGN DIRECT INVESTMENT

TOTAL FROM
IRELAND
INTO THE UK

€89 billion

TOTAL INTO
IRELAND
FROM THE UK

€37 billion



SERVICES

EXPORTS

€18.0 billion
OF SERVICES
TO THE UK

IMPORTS

€11.4 billion
OF SERVICES
FROM THE UK

COMMUTING

COMMUTERS TO/FROM NORTHERN IRELAND

TO IRELAND FOR
WORK OR STUDY

6,456 persons

TO NORTHERN IRELAND
FOR WORK OR STUDY

8,295 persons



POPULATION

112,259
persons

NUMBER OF
UK NATIONALS
IN THE STATE, 2011

4,525,281
persons

TOTAL
PERSONS IN
THE STATE, 2011



FOREIGN AFFILIATES

NUMBER OF PERSONS ENGAGED
IN IRISH OWNED FOREIGN
AFFILIATES IN THE UK

86,180 persons

TURNOVER OF
IRISH OWNED FOREIGN
AFFILIATES IN THE UK

€37.6 billion

Despite headwind of Brexit The UK will remain our largest trading partner
2000 EI companies register exports there, It is the largest key market for over 800
EI Clients.

EI Clients registered in exports €7.8Bn

Opportunities:

Language, culture and proximity

Northern strategy, Scotland, NHS, local government, Utilities & Water, Aerospace, services, and financial services.

The UK “Open for business”

Northern Powerhouse



Northern Powerhouse



Significant regional investment



Focus on regions on the whole.

LIVERPOOL REGION

Gross Value Added (GVA)

£29.5bn

GVA per Worker

£48,100

Population

1,524,500

Key Sectors

Advanced Manufacturing,
Creative & Digital,
Lifesciences, Biomass,
Financial & Professional

Includes

Halton, Knowsley,
Liverpool, St Helens,
Sefton and Wirral

Source: <http://www.centreforcities.org/liverpool-city-region/>

NEWCASTLE NNE

Gross Value Added (GVA)

£38.7bn

GVA per Worker

£43,116

Population

1,970,000

Key Sectors

Digital and Tech,
Advanced Manufacturing
& Automotive, Financial
& Professional Business
Services, Life Sciences
and Energy

Includes

Newcastle, Gateshead,
North Tyneside and South
Tyneside and Sunderland

Source: North East Local Enterprise
Partnership. 2016 figures

GREATER MANCHESTER

Gross Value Added (GVA)

£59.6bn

GVA per Worker

£48,100

Population

2,756,100

Key Sectors

Advanced Manufacturing,
Creative & Digital,
Lifesciences, Biomass,
Financial & Professional,
Education

Includes

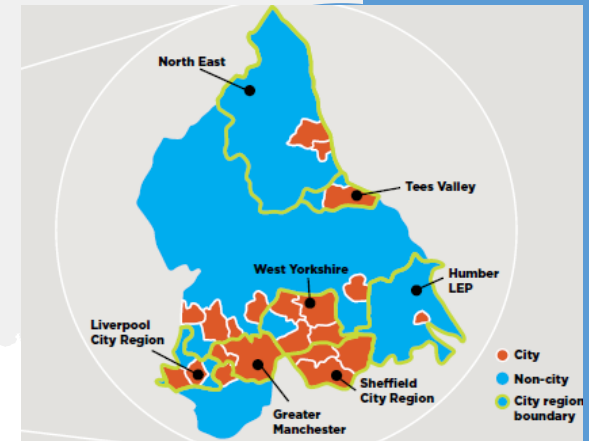
Bolton, Bury, Manchester,
Oldham, Rochdale, Salford,
Stockport, Tameside,
Trafford and Wigan

Source: <http://www.centreforcities.org/greater-manchester/>

Northern Power house




- **Digital Infrastructure** - €11Bn – data analytics in Leeds to gaming in Sunderland – Key players BBC, ITW, Rockstar games & Shop direct
- **Construction** – Manchester airport regeneration, Salford keys, 40k new homes in Leeds.
- **Engineering** – Industrial digitalisation, Rolls Royce, Land Rover, Caterpillar, Magellan, Raytheon



South West

- Largest concentration of digital technology in outside of London
- 100k employed in the Aerospace industry
- UK's #1 digital tech productivity powerhouse at £320k turnover per worker.
- Home to the most productive financial and professional services sector in the UK outside London and Edinburgh, representing 25 per cent of Bristol's economic output.
- One third of FTSE 100 companies have a base in the area



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- A map of Europe with the Eurozone countries highlighted in a light blue color. The rest of the world is shown in a darker grey-blue tone.
- The Eurozone Opportunity
 - Supporting Eurozone Clients
 - Questions ?

Opportunity is NOW

Eurozone economy enjoying stability and improved economic indicators

Positive view of Ireland, Irish products and services

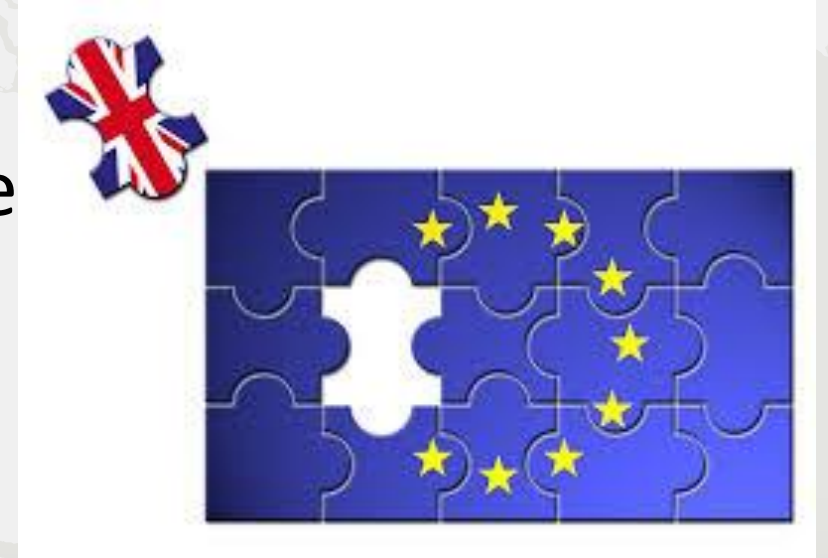
Reduce dependency on UK

Untapped Opportunity - €38 Billion



The Brexit Opportunity

- European manufacturers looking to source in EU and particularly in Eurozone
- Manufacturers now planning moving operations from UK to EU -will look for EU/Eurozone suppliers
- Ireland is seen as a thought leader on Brexit

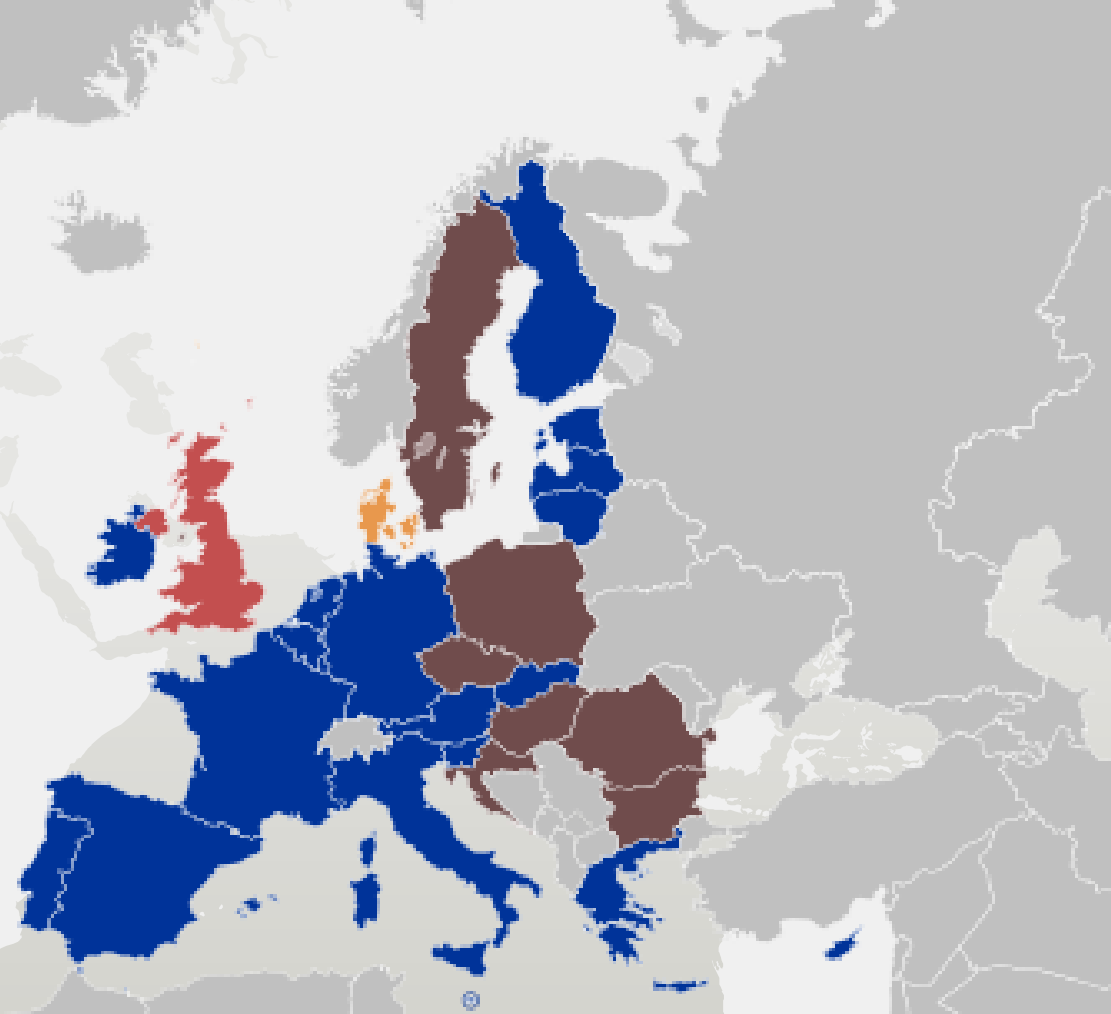


Eurozone offers particular advantages

- Shared currency
- Regulatory alignment
- NO customs requirements
 - Optimal time, administration and cost on delivery to market
- Improved access with increased capacity and new direct routes
- No tariffs or threat of tariffs

The Challenges

- **Language capability**
- **Different business cultures**
- **Resources**
 - time
 - skills
 - funds



Where to Start

- Market Research - Start here , We can help
- Trade missions
- EI Overseas network
- The Irish Advantage Campaign



Supports



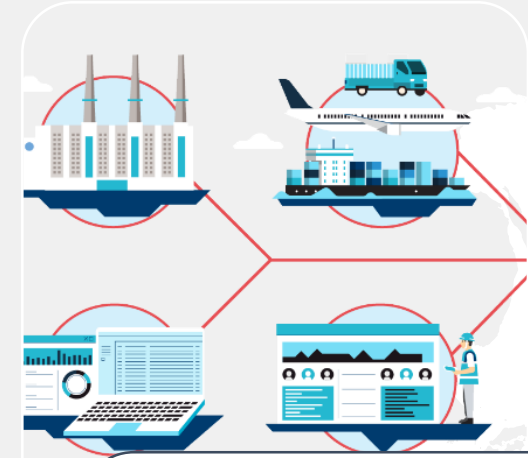
INNOVATE

- New 'Agile R&D Fund'
- **Horizon 2020** funding
- Access to Technology Gateways
- Regional Technology Centres



DIVERSIFY

- New 'Market Discovery' Fund
- Eurozone Strategy
- ↑Trade Missions
- Overseas offices (33)
- The Irish Advantage



COMPETE

- New 'Operational Excellence' Offer
- 'Spotlight on Skills'
- Lean Programmes (1,100)
- 'EI Learn'