SECTION 6f - CRITICAL ECONOMY SECTOR: TRADED SERVICES
Overview of Data Sources

http://www.enterprise-ireland.com/en/About-Us/Our-Clients/Eligibility-criteria.html RoI definition

http://connectingireland.com/ireland-in-anz/industry-sector-profiles/internationally-traded-services.aspx EI Importance of traded services to RoI

http://www.detini.gov.uk/fdi_in Tradable_services___8211__final_report.pdf page 4 definition of Tradable Services, NI


6f.1 Significance of Traded Services Sector - Growth and Potential

This section focuses on the more-advanced services sectors especially those that are internationally traded. Most modern economic strategies identify that successful modern economies have / target these sectors - which often comprise FDI firms, are export-oriented and utilising well-educated people (many of whom are well paid) - as a ‘competitive advantage’ in a modern global economy. Such sectors are often called ‘tradable services’, ‘traded services’ or ‘FIRE’ sectors (financial, insurance, real estate) - see the various definitions above. In practice, these firms are usually office-based and utilise telecommunications to sell their services beyond the Region and internationally - as call centres.

Whilst there is not an agreed definition of these traded services - in terms of SIC / NACE codes, it is useful to identify such businesses and employment in the Region - hence where the strengths and greatest potential are.

6f.2 Number of Services Firms

Commentary
As can be seen from Table 51, there are over 1,100 traded services firms in the Central Border Region. The number of such businesses has actually increased slightly, unlike their firms generally, therefore suggesting that traded services firms make up a resilient and growing sector.
<table>
<thead>
<tr>
<th>Area</th>
<th>Number of Traded Services Firms 2009</th>
<th>Total Firms 2009</th>
<th>Number of Traded Services Firms 2010 /2011*</th>
<th>Total Firms 2010 /2011*</th>
<th>Change in Traded Services Firms 2009-2010/11</th>
<th>Change in Total Firms 2009-2010/11</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cavan**</td>
<td>45</td>
<td>3,261</td>
<td>40</td>
<td>3,056</td>
<td>-5</td>
<td>-11.1%</td>
</tr>
<tr>
<td>Donegal</td>
<td>116</td>
<td>6,176</td>
<td>112</td>
<td>5,649</td>
<td>-4</td>
<td>-3.4%</td>
</tr>
<tr>
<td>Leitrim**</td>
<td>25</td>
<td>1,408</td>
<td>28</td>
<td>1,330</td>
<td>3</td>
<td>12.0%</td>
</tr>
<tr>
<td>Monaghan</td>
<td>28</td>
<td>2,792</td>
<td>28</td>
<td>2,641</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Sligo</td>
<td>66</td>
<td>2,607</td>
<td>74</td>
<td>2,458</td>
<td>8</td>
<td>12.1%</td>
</tr>
<tr>
<td>Armagh City, Banbridge and Craigavon Borough</td>
<td>365</td>
<td>8,390</td>
<td>365</td>
<td>8,100</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>Fermanagh &amp; Omagh</td>
<td>235</td>
<td>7,560</td>
<td>240</td>
<td>7,345</td>
<td>5</td>
<td>2.1%</td>
</tr>
<tr>
<td>Mid Ulster</td>
<td>285</td>
<td>8,315</td>
<td>305</td>
<td>8,145</td>
<td>20</td>
<td>7.0%</td>
</tr>
<tr>
<td>ICBAN Region</td>
<td>1,165</td>
<td>40,509</td>
<td>1,192</td>
<td>38,724</td>
<td>27</td>
<td>2.3%</td>
</tr>
<tr>
<td>Rep of Ireland*</td>
<td>12,075</td>
<td>206,575</td>
<td>11673</td>
<td>195,431</td>
<td>-402</td>
<td>-3.3%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>4,415</td>
<td>70,620</td>
<td>4265</td>
<td>67,955</td>
<td>-150</td>
<td>-3.4%</td>
</tr>
</tbody>
</table>

*RoI Latest figures are 2010, NI figures are 2011.

** Some of the Traded Services figures for Cavan and Leitrim are withheld - to prevent disclosure

+ Traded Services comprises ‘Information & Communication’, ‘Finance / Insurance’, and ‘Property / Real Estate’ - same in RoI and NI

Source: CSO & DETI / NISRA


http://www.detini.gov.uk/idbr_publication.pdf Page 2 Link, Table 1.5 or

6f. 3 Numbers Employed in Traded Services

Table 52: Employment in Traded Services* in Central Border Region - Census 2001/02 - 2011

<table>
<thead>
<tr>
<th>Area</th>
<th>2001 / 02</th>
<th></th>
<th>2006</th>
<th></th>
<th>2011</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>% of total pop that is At Work</td>
<td>Number</td>
<td>% of total pop that is At Work</td>
<td>Number</td>
<td>% of total pop that is At Work</td>
</tr>
<tr>
<td>Cavan</td>
<td>1,694</td>
<td>7.6%</td>
<td>2,417</td>
<td>8.5%</td>
<td>2,431</td>
<td>8.9%</td>
</tr>
<tr>
<td>Donegal</td>
<td>3,477</td>
<td>7.2%</td>
<td>4,768</td>
<td>8.4%</td>
<td>5,287</td>
<td>9.9%</td>
</tr>
<tr>
<td>Leitrim</td>
<td>817</td>
<td>8.2%</td>
<td>1,255</td>
<td>9.9%</td>
<td>1,252</td>
<td>10.5%</td>
</tr>
<tr>
<td>Monaghan</td>
<td>1,280</td>
<td>6.1%</td>
<td>1,628</td>
<td>6.4%</td>
<td>1,685</td>
<td>7.3%</td>
</tr>
<tr>
<td>Sligo</td>
<td>1,810</td>
<td>7.6%</td>
<td>2,239</td>
<td>8.2%</td>
<td>2,143</td>
<td>8.4%</td>
</tr>
<tr>
<td>Armagh City, Banbridge and Craigavon Borough</td>
<td>6,404</td>
<td>8.6%</td>
<td>N/A</td>
<td>N/A</td>
<td>2,739</td>
<td>3.0%</td>
</tr>
<tr>
<td>Fermanagh &amp; Omagh</td>
<td>3,033</td>
<td>7.3%</td>
<td>N/A</td>
<td>N/A</td>
<td>1,897</td>
<td>3.9%</td>
</tr>
<tr>
<td>Mid Ulster</td>
<td>3,367</td>
<td>7.1%</td>
<td>N/A</td>
<td>N/A</td>
<td>1,559</td>
<td>2.5%</td>
</tr>
<tr>
<td>ICBAN Region</td>
<td>21,882</td>
<td>7.6%</td>
<td>N/A</td>
<td>N/A</td>
<td>18,993</td>
<td>5.6%</td>
</tr>
<tr>
<td>Rep of Ireland</td>
<td>221,945</td>
<td>13.5%</td>
<td>266,368</td>
<td>13.8%</td>
<td>277,402</td>
<td>15.3%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>74,228</td>
<td>10.8%</td>
<td>N/A</td>
<td>N/A</td>
<td>33,497</td>
<td>4.2%</td>
</tr>
</tbody>
</table>

Source: Rol Census - CSO & NI Census - NISRA

*Traded Services comprises ‘Finance / Insurance’, and ‘Property / Real Estate’ - same in RoI and NI. However, ‘Information & Communication’ also appeared in 2011 NI Census and Rol 2011 at Region level only. Therefore, many figures in this table are suspect. NB

Rol 2011 Census (& 2006) Profile 3, Table CD319, Broad Ind. Group

http://www.nisra.gov.uk/Census/key_stats_bulletin_2011.pdf 2011 NI Click on p 31 link to Table KS605NI (Persons) (or KS607NI (Males), KS608NI (Females))
http://www.nisra.gov.uk/Census/2001%20Census%20Results/Key%20Statistics/KeyStatisticstoOutputAreaLevel.html 2001 NI Scroll down to Table KS11a.

6f.4 Traded Services Firms of the Central Border Region

Examples of major Traded Services employers in the Central Border Region include Avantcard (formerly MBNA / Bank of America) in Carrick-on Shannon and Liberty Insurance in Enniskillen / Cavan (formerly Quinn Direct). However, there is a notable absence of such firms from the Region generally, including IT / communications support companies. A useful study was undertaken for ICBAN, Cookstown District Council (now Mid Ulster District Council) and Cavan County Council / CEB (see link at top of Section) about how to attract more such businesses - but this absence of FIRE employment must remain a matter of concern.