The Regional Location of Indigenous and Foreign Manufacturing Establishments, 1929-1975

(Evidence from a repopulation of the Census of Industrial Production)

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Abstract

Regional industrial location has been a matter of intense political interest throughout the history of the state. Details of the geographic distribution of manufacturing establishments are sparse however – particularly until close to EEC accession – as reporting of the relevant data from the Census of Industrial Production (CIP) was heavily constrained by the requirement to maintain firm-level confidentiality. Data pertaining to the location of individual industries are even scarcer. Our research identifies most of the manufacturing establishments with workforces of 100 or more in 1929 and at various dates through to 1975. Establishments of this size accounted for more than 50 per cent of the industrial employment recorded in the CIP and are of particular importance given the generally positive relationship between establishment size and average compensation. Repopulating the CIP allows us to analyse the regional distribution of industry in significantly greater detail than has been possible up to now.

> The spatial pattern of manufacturing is an amalgam of the individual distributions of a number of different industrial types. The locational influences affecting the individual types differ and in any industry the effects vary over time. Complete synthesis and evaluation of the total dynamic complex of influences affecting the spatial distribution of the entire Irish manufacturing sector is not possible, so that treatment is limited to an outline of the main processes and factors involved.
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> – Desmond A. Gillmor (1985: 247) *Economic Activities in the Republic of Ireland: A Geographical Perspective*

Introduction

The period 1929-1975 spans a number of overlapping regional, industrial and international trade policy regimes. Industrial location under protectionism was subject to influence by ministerial edict. Regional industrial subsidies were introduced in 1952 and were supplemented by a national industrial grants scheme four years later. Export profits tax relief, also introduced in 1956, would become a cornerstone of the new export-oriented foreign direct investment (FDI) strategy that had emerged following the establishment of the Industrial Development Authority in 1949. An export processing zone was established at Shannon in 1958. Following two bouts of unilateral tariff reductions in 1963 and 1964, an Anglo-Irish Free Trade Area Agreement (AIFTA) was signed in 1965. AIFTA was to be phased in over the following ten years but was superseded by the accession of Ireland and the UK to the European Economic Community in 1973. Remaining restrictions on intra-Community trade in most industrial products would be eliminated by 1977. Safeguard measures for motor vehicle assembly would remain in place until January 1985.

Though regional industrial location had been a matter of intense political interest throughout the history of the state, details of the geographic distribution of manufacturing industry over most of this period are sparse. Reporting of the relevant data from the Census of Industrial Production (CIP) had been heavily constrained by the requirement to maintain firm-level confidentiality. Matters improved somewhat when survey data began to be made available by the Industrial Development Authority (IDA) in the mid-to-late 1960s, though these data were narrowly focussed on the characteristics, performance and location of plants of recent vintage.

A number of research studies including O'Malley (1967, 1971), Gillmor (1985) and Strobl (2004) have attempted to surmount the scarcity of regional establishment-level data by employing data from the population census. The population census however provides information on where individuals reside rather than on where they work. As Morgen Roth (2009) notes, such analyses may for this reason 'be subject to substantial bias'. Gillmor (1985) and Strobl (2004) both marry population census and IDA establishment-level data without adequate acknowledgement of the difficulties this entails.

A further difficulty involved in attempting to use the population census as a proxy for the CIP is the marked change in the comparability of the two censuses over the decades. The population census, which includes tradespersons operating on their own account and those working in enterprises which do not meet the size criterion for inclusion in the CIP, reported more than twice as many manufacturing workers as the CIP for 1926, the first year for which both censuses were conducted for the new Irish state (Table 1).[1] The gap diminished over time – as tailors and dressmakers for example were progressively replaced by clothing enterprises – and had almost disappeared by 1981.[2]

Table 1: Manufacturing Employment as Recorded in the Census of Industrial Production and the Census of Population, 1926-1981

Manufacturing Employment			
	Census of Industrial Production I	Census of Population II	Column I as a share of Column II
1926	56,535	118,219	48%
1929	62,439	-	-
1938	97,285	-	-
1946	105,625	147,706	72%
1951	140,283	184,194	76%
1961	157,622	179,436	88%
1971	196,274	213,633	92%
1972	197,315	-	-
1975	195, 093	-	-
1981	223,630	238,144	94%

Sources: CIP (Barry, 2023), CIP 1981, Table A; Pop Census (1926 Pop Cen, Table 1, vol. vii; 1971 Pop Cen, Table 1, vol. viii; 1981 Pop Cen, Table 6, vol. 4).

CIP data are clearly to be preferred to population census data if the focus is on the location of industrial establishments.[3] In order to maintain firm-level confidentiality however the CIP combined Manufacturing with Building & Construction and Mining, Quarrying & Turf in reporting on the regional distribution of industry. The non-manufacturing sectors typically accounted for 15 per cent or more of the total. Details of the regional distribution of individual manufacturing sectors are inevitably even sparser.[4] Nor is it possible on the basis

[1] The 1926 CIP (page vii) provides a sector-by-sector comparison of the number of industrial workers recorded in the two censuses for that year. The gap is particularly large in sectors such as grain milling and bread, biscuits & flour confectionery (due to the CIP's exclusion of smaller establishments); timber and metals & engineering (due to the exclusion of jobbing carpenters, blacksmiths and most electricians); and clothing & footwear (due to the exclusion of tailors, dressmakers, boot and shoe repair shops and the like).

[2] Vertically-integrated business structures increased in prominence in the wake of the Industrial Revolution. Mokyr (2001) reports on the longevity of less vertically-integrated business structures across several countries..

[3] An establishment is essentially an individual factory, creamery, brewery, bakery, print works or the like.

[4] The first Census of Industrial Production states that 'in order not to disclose the business of any individual concern, figures are shown separately only for those Counties etc. in which at least three establishments were engaged in production. Non-CIP based studies of the location of several individual sub-sectors have been conducted by Dwyer (1961), Dwyer and Symons (1963), Gillmor (1985), Press (1989) and Breathnach (2000). See also Barry (2003) and the reports of the Committee on Industrial Organisation of the early to mid-1960s.

of the CIP data to track developments in the 'congested', 'undeveloped' or 'designated' areas as these categories cut across certain county boundaries.

Table 2 provides details of the regional distribution of the broad industrial aggregate reported on in the CIP. Mary Daly comments on the data pertaining to the early decades of the new Irish state that 'the more intensive drive for decentralization in the late thirties appears to have been ineffective' (Daly, 1992, p. 112). Table 2 suggests that there was little change in this regard until the mid-to-late 1960s though it should be noted that Dublin – and to a lesser extent the other cities – was expanding as a share of the population while the shares of both Connacht and Ulster were declining.[5]

Table 2: Regional Distribution of Industrial Employment, 1931-1972 (%)

	1931(a)	1936(a)	1938(a)	1944(a)	1948(a)	1961(a)	1963 (a)	1972(b)
Dublin City	42	43	43	42	42	41	41	31
Rest of Leinster	18	19	19	20	20	23	23	30
Cork City	7	8	7	8	9	7	7	6
Limerick City	3	3	3	3	3	2	2	2
Waterford City	2	2	2	2	2	2	2	2
Rest of Munster	16	14	13	15	13	15	15	19
Connacht	7	6	8	7	7	6	6	6
3-county Ulster	5	5	5	5	5	4	4	5
Total	≈100							

Source: CIP (various years).
Notes: Columns may not sum to 100 due to rounding.
(a) Includes Mining & Quarrying and Building & Construction in addition to Manufacturing Industries.
(b) Does not include Turf Production and Building & Construction (Statistical Abstract 1974, table 103). B&C accounted for 23,775 jobs in 1972; Manufacturing for 197,310 (Statistical Abstract 1974, table 102).

Publication of the geographic breakdown employed in Table 2 ceased in 1973.[6] Though not directly comparable, the IDA Annual Employment Survey shows that Dublin's share of manufacturing employment continued to decline between 1972, when the survey commenced, and 1975, the end date of the present analysis (Table 3).[7]

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[5] See e.g. Gillmor (1985: 343).
[6] CIP 1980 page 147 states that "between 1946 and 1973, the [Statistical] Abstract included an analysis of the main variables by reference to the location of establishments."
[7] The IDA Employment Survey (now conducted by the Department of Enterprise, Trade and Employment) began as an annual survey of all existing manufacturing plants and was later extended to internationally-traded services. The response rate has generally been close to 100 per cent (Barrios, Gorg and Strobl, 2006). There was a total of 206,288 jobs recorded in 1972. The 1972 total for the CIP aggregate in Table 2 was 227,442.

Table 3: Regional Distribution of Manufacturing Employment, 1972 and 1975

Region	1972 (%)	1975 (%)
Dublin City	40%	38%
Rest of Leinster	22%	21%
Cork City	14%	14%
Limerick City	2%	3%
Waterford City	4%	4%
Rest of Munster	6%	7%
Connacht	6%	7%
3-county Ulster	6%	6%
Total	**100%**	**100%**

Source: IDA/Forfás/DETE Annual Employment Survey

The IDA had begun to collect data on employment in new grant-aided industries several years prior to this and these data spawned a large number of studies that appeared around this time.[8] McAleese (1977, table 3.4, 9, 23) compared the regional distribution of 'new industry' and aggregate manufacturing employment in 1974.[9] His results are reported in Table 4. The planning regions referred to in the table had been established under the Local Government (Planning and Development) Act of 1963. There was not an exact overlap between the least developed of these regions (Donegal, Sligo–Leitrim, Mayo–Galway and the Midlands) and the 'undeveloped' or 'designated areas' which were eligible for preferential grant treatment. As revealed in the final column, the Mid-West/SFADCo region performed best by this measure, followed by the group of least-developed planning regions.[10] The relatively low share of new industry locating in the advanced Eastern region is immediately apparent.

[8] See e.g. A Survey of Grant-Aided Industry (1967); McAleese (1977), Teeling (1975); Buckley (1975); Ó hUiginn (1972) and numerous papers by P. N. O'Farrell.

[9] 'New industries' refer here to projects supported by the Shannon Development Authority (SFADCo) and by IDA 'new industry grants' (as distinct from small-industry grants and re-equipment grants, also overseen by the IDA).

[10] SFADCo, the Shannon Free Airport Development Company, had been formally established in 1959 and was assigned responsibility for industrial development in the broader Mid-West region in 1968.

Table 4: Regional distribution of manufacturing and 'new industry' employment, 1974

	Regional share of manufacturing employment (%) I	Regional share of 'new industry' employment (%) II	Ratio (II/I)
Least-developed regions	13.1	19.1	1.5
Mid-West	7.7	12.9	1.7
East	46.4	23.6	0.5
Rest of the country	32.8	44.4	1.4
Total	**100**	**100**	**1**
	Manufacturing employment	**'New industry' employment**	
Total	210,193	60,161	29%

Source: Regional shares derived from Dermot McAleese. *A Profile of Grant-Aided Industry in Ireland,* (Dublin: Industrial Development Authority, 1977), Table 3.4, 23; total 'new industry' employment (end 1974) from McAleese, *Profile of Grant-Aided Industry*, Table 3.3, 21; total manufacturing employment (1974) from *Statistical Abstract of Ireland*, 1978, Table 101 (derived from CIP).

Some three-quarters of the increase in manufacturing employment between 1963 and 1975 was accounted for by post-1956 export-oriented foreign firms.[11] The presumption has been that the increased dispersion of industry over this period was a consequence primarily of the differential location patterns of these firms [Strobl (2004), Drudy (1991), O'Farrell (1975), MacFeely (2016)].[12]

2. The Contribution of the Present Paper

The present paper contributes to the analysis of regional industrial location by identifying the largest manufacturing establishments in operation in the Free State area in 1929 and at various other dates through to 1975.[13] Identifying the establishments provides information on their provenance and allows us to distinguish between incumbents and new entrants and between foreign-owned firms of different types. Our focus is on medium and large-scale establishments with workforces of 100-499 and 500+ respectively. Kennedy and Healy (1985) estimate that establishments employing 100 or more accounted for 53 per cent of the manufacturing employment recorded in the CIP in 1929, rising to 65 per cent by the mid-1970s (Table 5).

[11] Statistical Abstract (1966, 1978), O'Hearn (1987).

[12] See also Survey of Grant-Aided Industry (1967, pps. 29, 32).

[13] Barry (2023) identifies the largest firms in operation over these years. Sources for the firm-level data cited in the book are available at: https://doi.org/10.25546/101139 (Barry Project: Firm-Level Data on Irish Industrial History). The large and medium-sized establishments are a subset of the firms of these sizes. Much extra work went into determining which precise establishments met these size criteria (Scholz, 2022).

Table 5:
Distribution of Employment in Irish Manufacturing Industry by Establishment Size, various years, 1929-1975

Establishment size (by persons engaged)	**1929**	**1938**	**1946**	**1958**	**1963**	**1968**	**1975**
100-199			*17.7*	*15.3*	*16.5*	*17.3*	*17.9*
200-499			*21.7*	*22.8*	*23.1*	*22.9*	*22.1*
100-499	**34.8**	**39.5**	**39.4**	**38.1**	**39.6**	**40.2**	**40**
500+	**17.9**	**14.2**	**17.2**	**20.9**	**24.9**	**25.7**	**24.7**
TOTAL (100+)	**52.7**	**53.7**	**56.6**	**59**	**64.5**	**65.9**	**64.7**

Source: Kennedy and Healy (1985), Table 2.2 (based on CIP data)

These establishments would have been of particular importance given the generally positive relationship between establishment size and average compensation, for which Kennedy and Healy (1985, table 4.5) provide details for 1979. Table 6 reports the position for 1958. A similar empirical regularity prevails across the developed and developing worlds and applies to firm size as well as establishment size.[14] There may have been a wage premium associated with employment in protectionist-era foreign-owned companies – as there is in the case of their export-oriented equivalents – but there is little international or Irish evidence on this particular issue.[15]

Table 6:
Relationship between Establishment Size and Average Labour Compensation, manufacturing establishments, 1958

Establishment size (persons engaged)	Average wage and salary paid (£)
<5	249
5 to 9	305
10 to 49	346
50 to 99	350
100 to 199	366
200 to 499	415
500+	474

Source: Calculated from Table 9, Census of Industrial Production 1958-1960, Supplement to Irish Trade Journal and Statistical Bulletin, December 1962

Unsurprisingly, given the more than three-fold increase in manufacturing employment over the period of the analysis, the number of medium and large-scale establishments also increased substantially. The CIP for 1929 recorded nine manufacturing establishments with workforces of 500 or more. There were a further two large-scale railway engineering works which were not recorded in the CIP at this time, but would be included in later censuses. There were 52 manufacturing establishments of this size by 1975. The number of manufacturing establishments with 100 or more persons engaged increased more than three-fold over the period (Table 7).

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[14] Dickens and Katz (1986) note that internationally 'large employers typically pay more than small employers within a given industry'. See also Brown and Medoff (1989) and Strobl and Thornton (2004).
[15] Moran (2005, 285) reports that tariff jumping foreign investment projects in Latin America paid higher than average host-country manufacturing wages. It is unclear however whether this is a sectoral or an ownership effect.

Table 7: Number of manufacturing establishments with 100 or more persons engaged

Year	Workforce of 100-499	Workforce of 500+	Workforce of 100+
1929	121	9	130
1938	211	13	224
1944	183	13	196
1947	247	21	268
1958	273	31	304
1963	330	45	375
1975	393	52	445

Source: CIP (various years)
Note: Railway engineering works are not included in the CIP for 1929, 1938, 1944 and 1947.

It is important to note that we do not have employment data for each of the medium-sized establishments. The inclusion of a particular plant in this size class is based in many cases on a triangulation between evidence we have collected and clues provided by the Census of Industrial Production.[16] Our measure of regional dispersion is based therefore on a count of establishments rather than the direct employment data underlying Tables 2-4. In the case of large establishments (with workforces of 500 or more), we have reasonably accurate employment figures in most cases. These provide a basis for statements made in the text relating to these establishments.

3. Regional Policy Up To EEC Accession

Irish regional policy dates from the establishment of the Congested Districts Board (CDB) in 1891 as part of the policy of 'killing home rule with kindness' (Lee, 1973: 123). The disproportionate poverty of the western seaboard was to be alleviated primarily though the distribution of untenanted land but also through the development of infrastructure and industry. From 1909 the 'congested districts' would refer to Donegal, Kerry, west Cork, parts of Co. Clare, and all of Connacht (Freeman, 1943). Though the CDB was abolished at independence, regional issues remained formally on the agenda as both sides of the civil war divide placed a premium on the preservation of Gaeltacht areas.[17]

Protectionism, as Waterbury (1999) notes, enhances the 'discretionary interventions, patronage resources and rent-seeking opportunities for politicians in electoral democracies'. Both the 'selective protectionism' of the Cumann na nGaedheal era and the 'full protectionism' that followed from 1932 provided the authorities with policy instruments which could be used to influence industrial location. The policy itself may have made regional industrial dispersal more difficult to achieve however. According to (Meenan, 1970, p.322):

> The most obvious, and most facile, means of industrialization was to impose tariffs on imported consumer goods so that it would be profitable to manufacture them in Ireland. A number of consequences flowed from that approach. Because they depended on imported raw materials, which replaced the finished goods in

[16] For example, the 1929 CIP (p. 56) informs us that there were 39 establishments in the bread, biscuits and flour confectionery sector in Dublin City and County employing a total of 4,642. Our research shows that 3,000 of these were employed in the biscuit company W. & R. Jacob. This limits the number of remaining establishments that can employ a workforce of 100 or more.
[17] This brief history of regional policy draws on Barry and Ó Fathartaigh (2014) and Barry (2023).

> the import list, the new industries clustered around the major ports, which were also the major cities. This strengthened the forces making for urbanization

Strong localist pressures were nevertheless brought to bear on governments of all political complexions to seek to influence industrial location (Daly, 1992, pps. 106–16). Further powers were provided by the Control of Manufactures Acts of 1932 and 1934 which were designed to concentrate control of newly established firms in the hands of Irish citizens. Companies not fulfilling the criteria set down in the legislation could apply for a manufacturing licence (Daly, 1984). Lemass, as Minister for Industry and Commerce, endeavoured to make approval of many of the licences contingent on the establishments being located in the west. Though many applicants successfully resisted these pressures, a large number of projects ended up in compromise locations well beyond the major urban centres (Daly, 1992, pps. 107-112).

The establishment of the General Textiles cotton factory in Athlone in 1936 is a case in point. Lemass had been pressing for the plant, which was established in association with Belgian interests, to be located in Connacht. The acts contained a provision that prospective manufacturers, whether native or foreign, were required to obtain a license to produce anything declared to be ‘a reserved commodity’ (Daly, 1992). Though the possibility that foreign-owned firms might come to monopolise the market had been one of the arguments used to support the introduction of the acts, Lemass had raised the possibility of offering such a monopoly position as an inducement to General Textiles.[18] When an Athlone location was eventually agreed upon, the company was given a 15-year management contract, the exclusive right to manufacture certain products – also for 15 years – and tariff protection for certain products it was planning to produce (Eaton, 2003). The ‘reserved commodity’ clause was not used on this occasion. The one instance in which it was used was in the case of Irish Sewing Cotton, a British firm established in Westport, Co. Mayo in 1935 (Daly, 1992, p. 73).

Lemass also used the offer of protection to influence indigenous industrial projects. When Harold Goodbody of the Clara jute firm was approached by the Waterford Sack & Bag Co. in 1935 to inquire whether he would be interested in acquiring the operation, he found the site and the business to be unsuited to modern production methods. He was informed by Lemass that the government would nevertheless like to see it establish in Waterford. In return, the government increased the duty on particular jute products. Production commenced in a new Goodbody factory at Tycor in Waterford in March 1938 (Stewart, 1965). General Textiles, Irish Sewing Cotton and the new Goodbody plant all employed workforces in excess of 100 within a short period of time.

The Fianna Fáil government meanwhile had one of the three new sugar beet factories built at Tuam in County Galway – in an area that was not particularly well-suited to sugar beet production (Gillmor, 1985, p. 229) – while four of the five industrial alcohol distilleries commissioned by the government in 1933 were also built in peripheral regions: two in Donegal, one in Monaghan and one in County Mayo.[19]

Following three decades of independence however, the failure of existing methods to stimulate significant economic development in the west led the government to experiment

[18] Irish Times, 20 July 1935.
[19] Daly (1992, pps. 107, 112-14); *Dáil Éireann deb*. (*D.É.D.*), lxix, 1305-07 (1 Dec. 1937).

with a market-based regional development strategy. As the 1967 Survey of Grant-Aided Industry (p. 7) states,

> The origin of the Undeveloped Areas Act of 1952, which was the first of a series of Acts providing for the payment of new industrial grants, was the recognition that the West of Ireland had failed to benefit from the general industrial development programme to the same extent as other parts of the country, and that emigration from the West was far heavier than from other parts of Ireland. There was also general acceptance of the argument, in the light of a trend towards concentrating industrial activity in Dublin, Cork and the eastern part of the country, that it would be to the national advantage to have a more equitable distribution of industry throughout the country.

Under the terms of the 1952 act, cash grants were made available to industrial enterprises establishing in the 'undeveloped areas' – the new rubric used to describe the former congested districts.[20] The grants scheme followed international precedent.[21]

Although the Industrial Development Authority had only recently been established to promote industrial development, a new agency, An Foras Tionscal (AFT), was set up in 1952 to administer the grants. (The agencies would be merged in 1969).[22] The grants scheme occasionally led to controversy, as in the case of Sligo Spinning, a Castleguard Textiles subsidiary established in 1955.[23] More than one-third of the cost of the new facility was covered by grant aid.[24] A complaint from Youghal-based competitor Blackwater Cottons culminated in assurances from Lemass that the Sligo firm was established with the express purpose of spinning imported yarns rather than hosiery yarns of the type Blackwater produced.[25]

As would occur again in later crisis periods (MacFeely, 2016), regional policy was subordinated to the national economic imperative in the mid-1950s.[26] The Finance Act of that year offered a fifty per cent tax remission on profits derived from new industrial exports while the Industrial Grants Act of the same year empowered the IDA to offer capital grants to enterprises establishing outside the undeveloped areas.[27] The distinction between the incentives available inside and outside the undeveloped areas would be further eroded over the years, though some margin of difference was maintained. The peripheral areas would also benefit later from the provision of 'advance factories' and from IDA personnel bringing potential investors along predetermined "itinerary" routes (Breathnach, 1982).[28]

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[20] The 1952 Act defined the undeveloped areas as (i) the congested areas (Donegal, Kerry, Connacht, parts of Co. Clare and West Cork), and (ii) any other area to which, by order of the Minister, the Act is declared to apply. The evolution of the designation is described in NESC (1985). The designated area of West Cork was the area externally bounded from the north and east by Charleville, Kanturk, Macroom and Carrigaline. All of Co. Clare other than the Shannon Free Airport Area was designated in 1967. As these are largely coterminous with the traditional 'congested areas', this is the group to which we refer as the designated areas. Other areas beyond these boundaries would be included over time, frequently for political reasons.

[21] NESC (1975, p. 13).

[22] O'Malley (1990) p. 88.

[23] Irish Press 23/6/1955.

[24] Irish Independent 16/3/1957

[25] Irish Press 4/6/1955, Irish Independent 20/6/1956

[26] NESC (1975, pp 4-5); Girma, Strobl and Walsh (2008).

[27] O'Malley (1990) p. 88.

[28] O'Malley (1990) p. 89; NESC (1975) pp 24-5; Meyler and Strobl (2000)

O'Farrell would observe in 1971 that 'no single development problem in Ireland has generated so much controversy and emotion as the concept of spatially polarised growth'.[29] The era would witness a major clash between industrial 'concentrationists' and 'dispersionists'. The most substantive difference between the 1958 Whitaker report *Economic Development* and the government's *First Programme for Economic Development* was on regional policy. Whitaker argued that

> A realistic appraisal of development prospects indicates that, apart from exceptional cases, industries must be at or near the larger centres of population. Special subsidisation of remote areas by more extensive grants for industrial development is wasteful and retards progress in areas better situated.[30]

Mary Daly describes the First Programme as 'a watered-down version of *Economic Development* that expunged or diluted many of the tougher, politically-unpalatable recommendations'.[31] Whitaker's views on industrial location were not incorporated. Responsibility for regional industrial dispersal would ultimately devolve to the IDA (Barry, 2023).

The Industrial Development Authority Act of 1969 formally assigned the body a regional development mandate, imparting an added impetus, as one senior IDA manager put it, 'to an activity that had been underway for some time'.[32] The IDA's Small Industries Programme was launched on a pilot basis in 1967 and extended across the country two years later. Its Regional Industrial Plans for 1973–1977 set out manufacturing job targets for large numbers of grouped towns and villages. Only 50 per cent of the new jobs envisaged were to be located in the nine growth centres that had been recommended by the Buchanan Report of 1969.[33]

The period since 1961 had already witnessed substantial industrial dispersal, as seen in Table 2 above. This was particularly the case since 1966.[34] Many new export-oriented industries were choosing or being induced to locate beyond the Eastern region. As seen already in the final column of Table 4, the Mid-West/SFADCo region performed best in manufacturing employment terms over this later period, followed by the group of least-developed planning regions. The Finance Act of 1958 had offered a 25-year exemption on export profits for qualifying companies establishing at Shannon at a time when the general exemption was for ten years. An export processing zone was established at the airport under the Customs Free Airport (Amendment) Act of the same year.[35] The Shannon Free Airport Development Company (SFADCo) was established in 1959 to operate the zone.

[29] O'Farrell (1971), 453.
[30] Whitaker Report, 218.
[31] Daly (2016), 23.
[32] *Irish Times*, 20 November 1973. Though grants had been available for industrial projects located in the 'undeveloped areas' since 1952, their relative efficacy had been eroded by the introduction in 1956 of grants for investments elsewhere in the country.
[33] NESC (1975: 48); IDA (1972), 16.
[34] See Table 1, 'Regional industrial development', *Irish Times*, 20 November 1973.
[35] *Irish Times*, Sep 27, 1960. For more on the conditions determining firm eligibility, see *Irish Times*, Feb 13, 1963.

4. The Largest Size Category of Establishments

Location

Table 7 provides data from the CIP on the number of establishments with workforces of 500 or more in 1929 and at various dates through to 1975. The CIP also identifies the sectors in which establishments of various size categories were located. There were two establishments of the largest size category in Bread, Biscuits and Flour Confectionery in 1929 for example, and four in 1963. An adjustment needs to be made for the railway engineering works at Inchicore and Dundalk which were not included in the CIP in the years to 1947, but are included for the years from 1958. (The engineering works at Dundalk had closed by 1963.)

We have identified the vast bulk of these large-scale establishments, along with details of their locations and nationality of ownership. Consistent with the data presented earlier from other sources, a change in the pattern of regional location becomes apparent from 1963. For our benchmark years, Dublin's share of large establishments fell below one half for the first time in the 1970s, and large-scale establishments appear for the first time in some of the 'undeveloped' areas in these two years (initially Sligo and Kerry, followed later by Mayo and Galway).[36] Large-scale establishments remain highly regionally concentrated however. The four counties that hosted large-scale establishments in 1929 continued to host 84 per cent of the much-expanded number (38 out of 45) in 1963 and 75 per cent (39 of the 52 in operation) in both 1972 and 1975.

The table also includes selected details on foreign ownership. The letter **F** denotes a foreign-owned 'tariff factory'. Guinness, though technically foreign-owned since its flotation on the London stock market in 1886, was not a tariff factory, nor was the original Ford plant, which commenced production in 1919. We change Ford's status to **F** from 1932 however. A decision had been taken to close the plant in the early 1930s but this was reversed when the newly-elected Fianna Fáil government imposed restrictions on the importation of fully assembled vehicles. **AF** refers to a formerly indigenous firm that had been acquired by a foreign entity subsequent to its having reached a scale of some significance, while **XF** refers to a 'new' (post mid-1950s) export-oriented foreign enterprise. There are judgement calls to be made in these cases also.[37]

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[36] We do not distinguish between Dublin city and county in the table. Balbriggan is the only town in North County Dublin to feature. Given the large size of Co. Cork, we distinguish between Cork City and the rest of the county.

[37] Rowntree-Mackintosh is categorised as **F** rather than **AF** though both firms entered Ireland separately in the 1920s by acquiring existing small indigenous firms. Williams & Woods was acquired by British firm Crosse and Blackwell, also in the 1920s: it could be characterised as either **F** or **AF**. The Philips factory in Dublin was originally established in the 1950s to produce for the protected market but later became export-oriented, while Verolme shipyard in Cork could be classified as either **F**, **AF** or **XF** (Barry, 2023).

Table 8: Location of Establishments with 500+ Persons Employed, 1929-1975

Year	**1929**	**1938**	**1947**	**1963**	**1972**	**1975**
No. of large scale establs as reported in CIP	9	13	21	45	53 (authors' estimate)	52*
No. of large scale establs including railway engineering works	11	15	23	45	53	52*
Location	Dublin 7 **(2xF)**	Dublin: 10 **(3xF)**	Dublin 12 **(3xF)**	Dublin 24 **(7xF)** **(2xAF)**	Dublin 21 **(5xF)** **(2xAF)** **(2xXF)**	Dublin 24 **(5xF)** **(1xAF)** **(3xXF)**
	Cork1	Cork 3 **(2xF)**	Cork 4 **(2xF)**	Cork 5 **(3xF)**	Cork 7 **(3xF)** **(1xXF)**	Cork 8 **(3xF)** **(1xXF)**
	Co. Cork 1		Co. Cork 1	Co. Cork 2	Co. Cork 6	Co. Cork 4
	Louth: 1	Louth: 1	Louth: 3 **(2xF)**	Louth: 5 **(2xF)** **(1xAF)**	Louth 5 **(1xF)** **(1xAF)** **(1xXF)**	Louth 4 **(1xF)** **(1xXF)**
	Offaly: 1.	Offaly: 1.	Offaly: 2 **(1xF)**	Offaly:2 **(1xF)**	Offaly:1 **(1xF)**	
			Carlow 1	Carlow: 1		Carlow: 1
				Westmeath 1 **(1xF)**		
				Waterford 3	Waterford 2	Waterford 2
				Kildare 1	Kildare 2	Kildare 2
				Wicklow: 1.	Wicklow: 2	Wicklow: 1
					Meath 1	
					Shannon 2 **(2xXF)**	Shannon 1 **(1xXF)**
					Co. Limerick 2 **(2xXF)**	Co. Limerick 2 **(2xXF)**
					Co. Kerry 1 **(1xXF)**	Co. Kerry 1 **(1xXF)**
					Co. Sligo 1 **(1xXF)**	Co. Sligo 1 **(1xXF)**
						Co. Galway 1 **(1xXF)**
						Co. Mayo 1 **(1xXF)**

* Note: While the CIP for 1975 reports a total of 52, our research unearths 53. (One or other of our establishments would presumably have been marginally under 500 at the time.)

Tracking from left to right across the table, tariff jumpers (denoted **F**) are responsible for the addition of only one new location to the list over the decades. (This is General Textiles in Westmeath, which appears in the column for 1963). Tariff factories were not therefore a major contributor to regional dispersion. In 1972 and 1975, by contrast, new export-oriented MNCs (denoted **XF**) were responsible for the addition of almost all of the new locations to appear on the list (the sole exception in this case being Navan Carpets in Meath, which appears in the column for 1972). **XF** firms *were* a major contributor to the increased dispersion seen in the later years of the study period. (Also notable is the concentration of **AF** firms in the 'traditional' industrial regions.)

That the four counties that hosted large establishments in 1929 accounted for all of the large foreign-owned tariff factories throughout the entire period (as well as all of the brownfield acquisitions denoted **AF**) supports the suggestion by James Meenan and Mary Daly that protectionism did relatively little to advance regional dispersal. Contrary to Meenan however, not all of these plants were established at major port locations: some were in other areas with good transport links and established industrial roots. That the regions that entered the table for the first time in the 1970s all did so by hosting new export-oriented MNCs supports the suggestion by later writers that the ‘industrialisation by invitation’ strategy was associated with greater industrial dispersion. Indeed, that the peripheral counties entered the list only by attracting ‘new industry’ foreign establishments supports the presumption that this pattern was a direct consequence of regional policy.

Chart 1 depicts the changing distribution of large establishments over the period 1929-1975. The share accounted for by Dublin City and County remained largely static between 1929 and 1938 but declined thereafter. By the 1970s, the west and southwest were becoming increasingly significant locations.

CHART 1:

Distribution of Large Manufacturing Establishments in Ireland 1929 - 1975 (1)

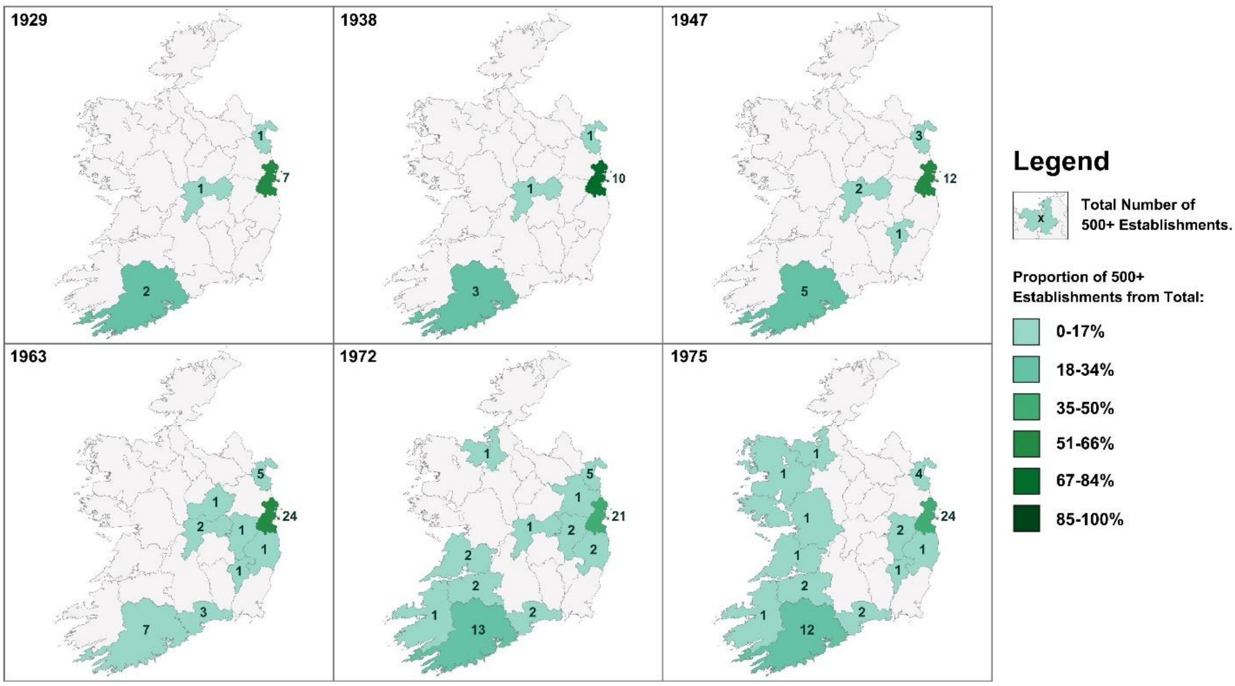
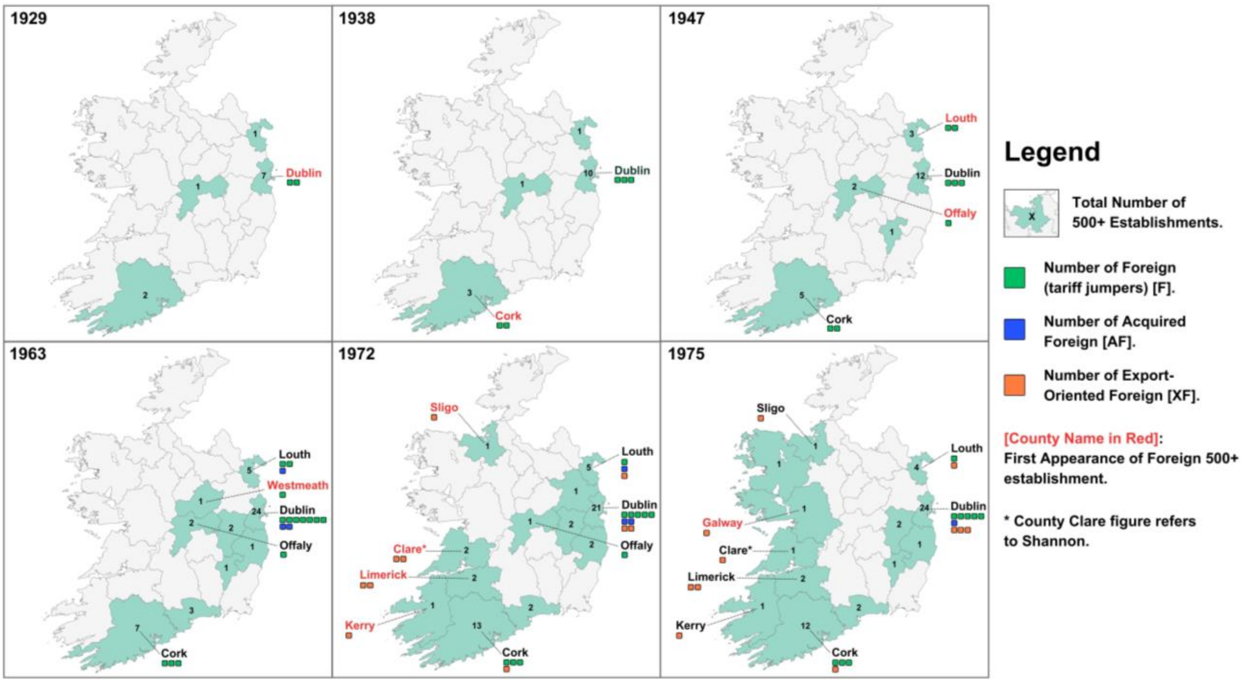


Chart 2 focusses on the ownership of the large establishments. It visually depicts what has already been discussed in the context of Table 8. All of the tariff jumpers chose to locate either in Leinster or Cork while most of the large establishments in the west were export-oriented.

CHART 2:

Distribution of Large Manufacturing Establishments in Ireland 1929 - 1975 (2)



Individual Industrial Sectors

We now turn to an analysis of the patterns pertaining to individual industrial sectors. (Note that our extrapolating from the locations of the largest establishments is justified by what we know of employment levels in these particular plants. Further supporting evidence is provided in Table 14.) Table 8 reports on the class of large establishments in Food, Drink & Tobacco. Other than in the cases of beef and dairy, the various sub-components remained strongly concentrated in Dublin throughout the entire period of the analysis. Semi-state company Irish Sugar and the long-established Carrolls tobacco factory in Dundalk were the only entities not to conform to this pattern. The beef and dairy sectors, by contrast – in which large establishments began to emerge only in the AIFTA era of the mid-to-late 1960s – were largely based outside Dublin.[38] Highly Dublin-centric sectors such as bread, biscuits & flour confectionery; cocoa, sweets & chocolate confectionery; drink & tobacco – and others to be discussed below – shrank over this period, while employment in the beef and dairy sectors

[38] The main UK market access benefits of AIFTA to Ireland were in beef and dairy products and materials containing man-made fibres (Barry, 2023). The CIP for 1975 records an employment level of 1,473 in the sector *manufacture of other chemical products including man-made fibres*, though many major firms were involved in this segment. These included Janelle and Glen Abbey, which were largely based in Dublin, Cork firms Sunbeam, Seafield and Martin Mahony, Irish Ropes in Kildare, Courtaulds in various non-Dublin locations, and new foreign enterprises ‘Pretty Polly’ in Killarney, Snia in Sligo and Lana-Knit in Shannon. Seafield Fabrics was described in 1965 as ‘the largest users of man-made fibres in this country’ (Irish Times, 23 Dec 1965). These operations expanded on aggregate over the period 1963-1975, with the bulk of the expansion taking place beyond Dublin. [For a discussion of the employment losses associated with AIFTA (though without a strong focus on the regional angle) see NESC (1983)].

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expanded both in absolute terms and as a share of the total (Table 14). This was an added factor in the decline in Dublin's share of manufacturing employment.

Table 9: Large-scale establishments in Food, Drink & Tobacco

1929	1938	1947	1963	1972	1975
Bread, Biscuits and Flour Confectionery					
Jacobs (Dublin); Bolands (Dublin)	Jacobs (Dublin);	Jacobs (Dublin); Bolands (Dublin); Johnston, Mooney & O'Brien (Dublin)	Jacobs (Dublin); Bolands (Dublin); Bolands Biscuits (Dublin); Johnston, Mooney & O'Brien (Dublin)	Jacobs (Dublin); Bolands (Dublin); Johnston, Mooney & O'Brien (Dublin)	Jacobs/Irish Biscuits (Dublin); Bolands (Dublin); Johnston, Mooney & O'Brien (Dublin)
Sugar, sweets and chocolate confectionery					
Williams & Woods (Dublin) **F**;	Williams & Woods (Dublin) **F**; Rowntree (Dublin) **F**	Williams & Woods (Dublin) **F**; Irish Sugar (Carlow)	Williams & Woods (Dublin) **F**; Rowntree (Dublin) **F;** Irish Sugar (Carlow); Irish Sugar (Co. Cork); Cadbury (Dublin) **F;** Urney/HB (Dublin) **AF**	Williams & Woods (Dublin) **F**; Rowntree (Dublin) **F;** Irish Sugar (Co. Cork); Cadbury (Dublin) **F;**	Williams & Woods (Dublin) [39], **F**; Rowntree (Dublin) **F;** Irish Sugar (Carlow); Cadbury (Dublin) **F;**
Beef					
			Clover (Waterford)	Clover (Waterford); Irish Meats (Kildare)	Clover (Waterford); Irish Meats (Kildare); International Meats (Dublin)
Dairy					
				Mitchelstown (Co. Cork); Ballyclough (Co. Cork); Golden Vale (Co. Cork); HB (Dublin) **AF**	Mitchelstown (Co. Cork); Ballyclough (Co. Cork); Golden Vale (Co. Cork); HB (Dublin) **AF**; Premier Dairies (Dublin)[40]
Drink					
Guinness (Dublin)	Guinness (Dublin)	Guinness (Dublin)	Guinness (Dublin)	Guinness (Dublin)	Guinness (Dublin); Cantrell & Cochrane (Dublin)
Tobacco					
Wills (Dublin) **F**	Wills (Dublin) **F**	Wills (Dublin) **F**	Wills (Dublin) **F**; Players (Dublin) **F**; Carrolls (Louth)	Players-Wills (Dublin) **F**; Carrolls (Louth)	Players-Wills (Dublin) **F**; Carrolls (Louth)

The Textiles, Clothing and Footwear sectors were largely based in areas other than Dublin (Table 9). Cork had long been the centre of the woollen industry, which Bielenberg ascribes to the lead set by Martin Mahony & Brothers (Blarney Woollen Mills), whose technical and organizational innovations were copied by other local producers.[41] J. & L.F. Goodbody of Clara and Smyths of Balbriggan had been leaders in the Irish jute and hosiery sectors since

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[39] Willwood had transitioned into fruit and vegetable processing by this date.

[40] Premier Dairies in Dublin also employed more than 500 in 1972, but since 'pasteurisers and bottlers were included for the first time in 1973' (Statistical Abstract, 1977, p. 1171) it is included for 1975 but not for 1972. HB by contrast was an ice cream factory.

[41] Bielenberg (1991), 40.

the mid-1800s. Footwear production had been concentrated in Co. Louth since the Cumann na nGaedheal tariffs of the mid-1920s. [42]

Table 10: Large-scale establishments in Textiles, Clothing and Footwear

1929	1938	1947	1963	1972	1975
			Textiles and Clothing		
Goodbody Jute (Offaly); Blarney Woollen Mills (Co. Cork)	Goodbody Jute (Offaly); Smyth Hosiery (Co. Dublin); Sunbeam (Cork)	Goodbody Jute (Offaly); Blarney Woollen Mills (Co. Cork); Smyth Hosiery (Co. Dublin); Sunbeam (Cork); Salts (Offaly) **F**; Lee (Cork); Polikoff (Dublin) **F**	Goodbody Jute (Offaly); Goodbody Jute (Waterford); Blarney Woollen Mills (Co. Cork); Sunbeam (Cork); Salts (Offaly) **F**; General Textiles (Westmeath); Irish Ropes (Kildare)	Blarney Woollen Mills (Co. Cork); Sunbeam (Cork); Salts (Offaly) **F**; Youghal Carpets (Co. Cork); Navan Carpets (Meath); Lana-Knit (Shannon) **XF**; Pretty Polly (Kerry) **XF**	Sunbeam (Cork); Youghal Carpets 1 (Co. Cork); Youghal Carpets 2 (Co. Cork); Pretty Polly (Kerry) **XF**; Glen Abbey (Dublin)
			Footwear		
		Halliday (Louth) **F**; Rawson (Louth) **F**	Halliday (Louth) **F**; Rawson (Louth) **F**	Halliday/Clarks (Louth) **F**	Halliday/Clarks (Louth) **F**

In the case of Metals & Engineering, there is a clear distinction between the location patterns of traditional segments (Metals, Motor Vehicles and Parts, and Other Transport Equipment), which were largely based in Dublin and Cork, and to some extent in Co. Louth, and the more dispersed pattern apparent in the case of the 'modern' segment (Electrical Equipment and Apparatus).

Table 11: Large-scale establishments in Metals and Engineering

1929	1938	1947	1963	1972	1975
			Metals		
	Hammond Lane (Dublin)		Irish Steel (Cork)	Irish Steel (Cork) Ferenka (Limerick) **XF**	Irish Steel (Cork) Ferenka (Limerick) **XF**
			Electrical		
			Philips (Dublin) **F**; AET (Louth) **AF**; Pye (Dublin) **F**; Unidare (Dublin)	AET (Louth) **AF**; Ecco (Louth) **XF**; EI Co. (Shannon) **XF**; Krups (Limerick) **XF**; Technicon (Dublin) **XF**	Philips (Dublin) **XF**; Ecco (Louth) **XF**; EI Co. (Shannon) **XF**; Krups (Limerick) **XF**; Technicon (Dublin) **XF;** Digital (Galway) **XF**; Travenol (Mayo) **XF**
			Motor Vehicles and Parts		
Ford (Cork)	Ford (Cork) **F**	Ford (Cork) **F**; CIE bus assembly (Dublin); Another domestic (Dublin)	Ford (Cork) **F**; Brittain, Lincoln & Nolan (Dublin); Another domestic (Dublin)	Ford (Cork) **F**; Semperit (Dublin) **XF**; Fiat (Dublin) **F**	Ford (Cork) **F**; Semperit (Dublin) **XF**; Fiat (Dublin) **F**
			Other Transport Equipment		

[42] Among the reasons reported to have favoured Co. Louth were its industrial tradition, labour availability, good port and rail facilities, and easy access to Dublin: Dwyer (1961). The importance of a region's industrial tradition is explained by frequent references to difficulties pertaining to men previously employed in agriculture being 'difficult to train in industrial processes or in adapting themselves to an industrial environment' (Survey of Grant Aided Industry, 1967, p.92).

Inchicore railway engineering (Dublin); Dundalk railway engineering (Louth)	Inchicore railway engineering (Dublin); Dundalk railway engineering (Louth)	Inchicore railway engineering (Dublin); Dundalk railway engineering (Louth)	Inchicore railway engineering (Dublin); Verolme Shipyard (Cork) **XF**; Aer Lingus maintenance (Dublin)	Inchicore railway engineering (Dublin); Verolme Shipyard (Cork); Aer Lingus maintenance (Dublin)	Inchicore railway engineering (Dublin); Verolme Shipyard (Cork); Aer Lingus maintenance (Dublin)

The Paper, Printing and Publishing sector was firmly Dublin-based (Table 11), while Clay, Glass and Cement, unsurprisingly, was more dispersed. Employment in the former barely changed between 1963 and 1973, implying that it fell significantly as a share of total manufacturing. The changing sectoral structure of the economy was a contributory factor to the decline in Dublin's share of manufacturing employment over this period.

Table 12:
Large-scale establishments in Paper, print and publishing and Clay, glass and cement

1929	1938	1947	1963	1972	1975
			Paper and Paper Products		
			Clondalkin Paper Mills (Dublin); Killeen Paper Mills (Dublin) **AF**	Clondalkin Paper Mills (Dublin); Killeen Paper Mills (Dublin) **AF**	Clondalkin Paper Mills (Dublin)
			Printing and Publishing		
Independent Newspapers (Dublin);	Independent Newspapers (Dublin); Helys (Dublin)	Independent Newspapers (Dublin)	Independent Newspapers (Dublin); Brown & Nolan (Dublin); Another domestic (Dublin)	Independent Newspapers (Dublin); Irish Press (Dublin)	Independent Newspapers (Dublin); Irish Press (Dublin)
			Clay, Glass and Cement		
			Irish Glass Bottle Co. (Dublin); Arklow Pottery (Wicklow); Waterford Glass (Waterford) Irish Cement (Louth)	Irish Glass Bottle Co. (Dublin); Arklow Pottery (Wicklow); Waterford Glass (Waterford); Irish Cement (Louth); Roadstone (Dublin); John A. Wood (Cork)	Irish Glass Bottle Co. (Dublin); Waterford Glass (Waterford); Irish Cement (Louth); Roadstone (Dublin); John A. Wood (Cork)

The other remaining sectors charted in Table 12 were a mixture of traditional and modern segments, with the by-now-familiar location patterns associated with these industry characteristics.

Table 13: Large-scale establishments in Other Remaining Sectors

1929	1938	1947	1963	1972	1975
Chemicals, Man-Made Fibres, Rubber and Plastics					
	Dunlop (Cork) **F**;	Dunlop (Cork) **F**;	Dunlop (Cork) **F**;	Dunlop (Cork) **F**; Gouldings (Dublin); NET (Wicklow); Snia (Sligo) **XF**; Pfizer (Cork) **XF**; Irish Ropes (Kildare) [43]	Dunlop (Cork) **F**; NET (Wicklow); Snia (Sligo) **XF**; Pfizer (Cork) **XF**; Irish Ropes (Kildare)

Table 14 demonstrates the decline in the share of employment in highly Dublin-centric sectors over the 1960s and 1970s – a characterisation supported by the industry location quotients for Dublin provided by O'Malley (1971, Appendix), which, as noted previously, are based on census of population data. Meat and dairy, meanwhile, which were concentrated in areas other than Dublin, expanded.[44]

Table 14: Developments in Dublin-centric sectors and in Meat and Dairy, 1963-1975

Sector	Share of manufacturing employment, 1963	Share of manufacturing employment, 1975	Industry location quotient, Dublin
Bread, biscuits and flour confectionery	5.7	4.6	3.66 (biscuits) 1.44 (bread and flour confectionery)
Cocoa, chocolate and sugar confectionery (excl. sugar processing)	3	2.7	3.15
Drink	4.6	4.0	2.96 (brewing) 2.08 (distilling) 1.13 (soft drinks)
Tobacco	1.4	1.2	2.79
Paper, print and publishing	8.9	8.3	2.70 (print and publishing) 2.68 (paper)
Meat Processing	4.3	5.3	0.46 (bacon) 1.54 (other meat products)
Dairy	2.8	5	0.45

5. Large and Medium-Sized Establishments

We turn our attention now to the entirety of establishments with workforces of 100 or more, including those with workforces of 500+.[45] Chart 3 shows the net change in each county's

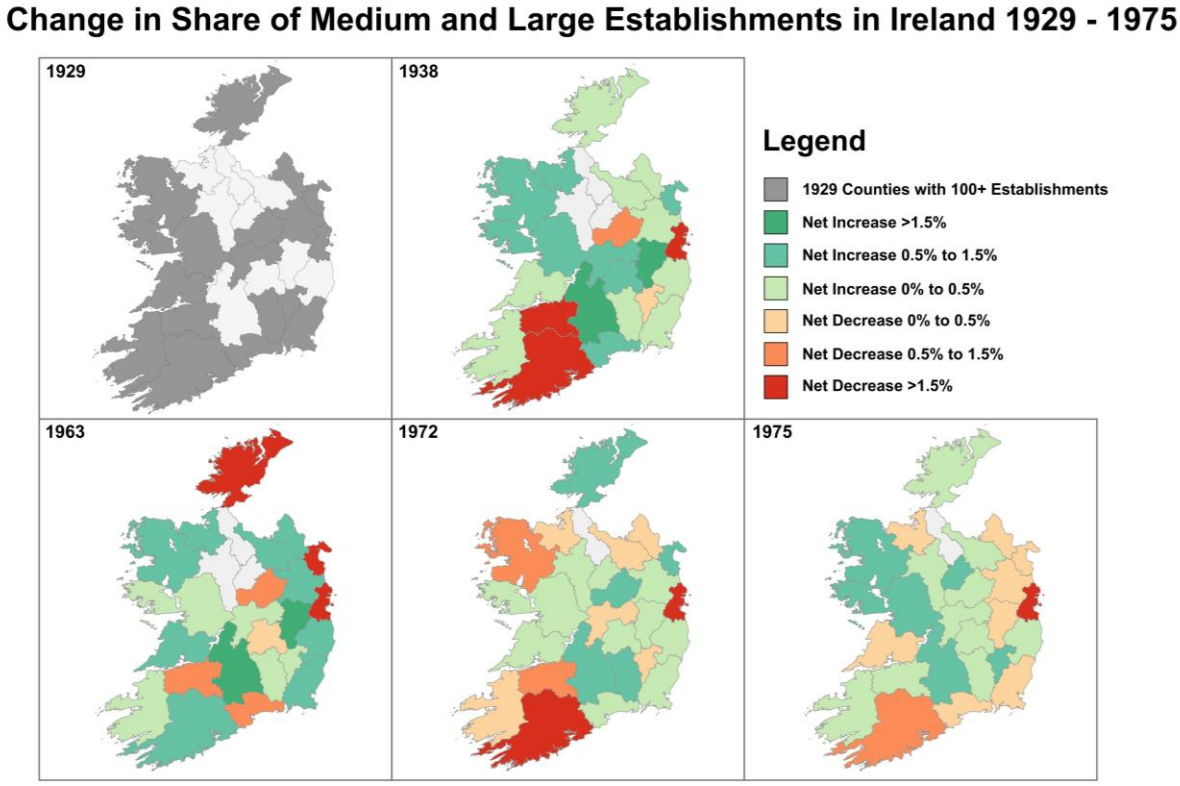
[43] From 1966, Irish Ropes had moved into polypropylene; hence we include it under 'plastics' for 1972 and 1975.

[44] The industry location quotients are derived by O'Malley from the 1961 population census. They measure a region's share of industry i employment relative to its share of employment across all industries. For meat products other than bacon, Kildare had a location quotient of 10. Counties with the highest dairy location quotients included Limerick, Cork and Waterford.

[45] We have dropped 1947 from this segment of the analysis because of difficulties encountered in unearthing employment data pertaining to large numbers of medium-sized establishments.

share of such establishments. A light to dark green colouring denotes an increase in a county's share, while light orange to dark red denotes a decrease. Dublin loses more than 1.5 per cent of its share in each of the four observations subsequent to 1929. The increase in the western periphery's share between 1929 and 1938 offers a corollary to Mary Daly's observation that the "intensive drive for decentralization in the late thirties appears to have been ineffective" (Daly 1992, p. 112). While the west may just have maintained its employment share (as seen in Table 2), that it increased its share of establishments of significance would have yielded benefits in the form of enhanced labour compensation.

CHART 3



Dublin versus the Designated Areas

Details of the number of establishments with 100 or more persons engaged in 1929 and at subsequent points through to 1975, along with the number and share of such establishments in Dublin and in the designated areas of the western periphery are provided in Table 15. The designated areas we define as Donegal, Kerry, Co. Clare (other than Shannon), areas of west Cork, and all of Connacht.[46]

Just as the ratio of the top to bottom decile is widely used as a shorthand measure of income distribution when the entire distribution pattern is unknown, all we can provide at this stage is a comparison between Dublin, the most advantaged region, and the designated areas, which are among the most disadvantaged. We do not know, for example, without substantial further

[46] These were largely the areas denoted 'the congested districts' in 1909 and the 'undeveloped areas' in the 1952 Undeveloped Areas Act. Other areas were added at various times, sometimes for clearly political reasons.

research work, the total number of tariff jumping establishments in the state. Hence we cannot as yet assess developments in the periphery's share of such establishments.

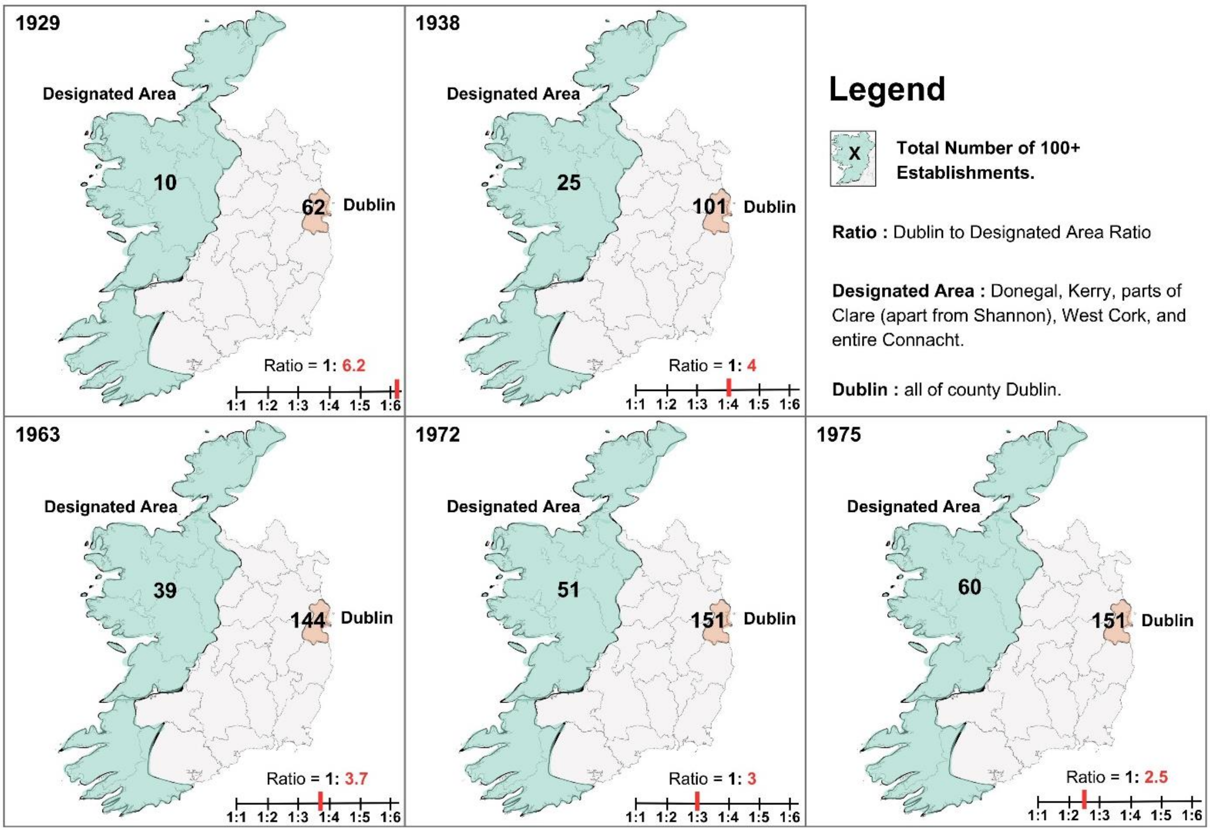
Table 15: Number of medium and large establishments nationally, in Dublin, and in the designated areas

Year	**1929**	**1938**	**1963**	**1972**	**1975**
No. of establs of 100+ persons engaged, including railway engineering works (CIP, adjusted)	132	226	375	428 (authors' estimate)	445
No. of 100+ establs in Dublin (authors' estimate)	62	101	144	151	151
Dublin share of 100+ establs	47	45	38	35	34
No. of 100+ establs in designated areas(authors' estimate)	10	25	39	51	60
Designated-area share of 100+ establishments	7.6	11.1	10.4	11.9	13.5
Dublin share of 100+ establishments / Designated-area share	**6.2**	**4**	**3.7**	**3**	**2.5**

Table 15 shows that while Dublin's share of medium and large-sized establishments declined monotonically over the years for which we have data, the periphery's share oscillated. The ratio of the Dublin share to that of the periphery nevertheless declined continuously. Chart 4 provides a visualisation of these developments. In 1929, for every one medium and large-scale establishment in the designated areas there were 6.2 in Dublin. The ratio decreased progressively to 4 in 1938, 3.7 in 1963, 3 in 1972 and 2.5 in 1975. This aligns with our previous observation of locational dispersion beginning in the 1930s and continuing into the 1970s.

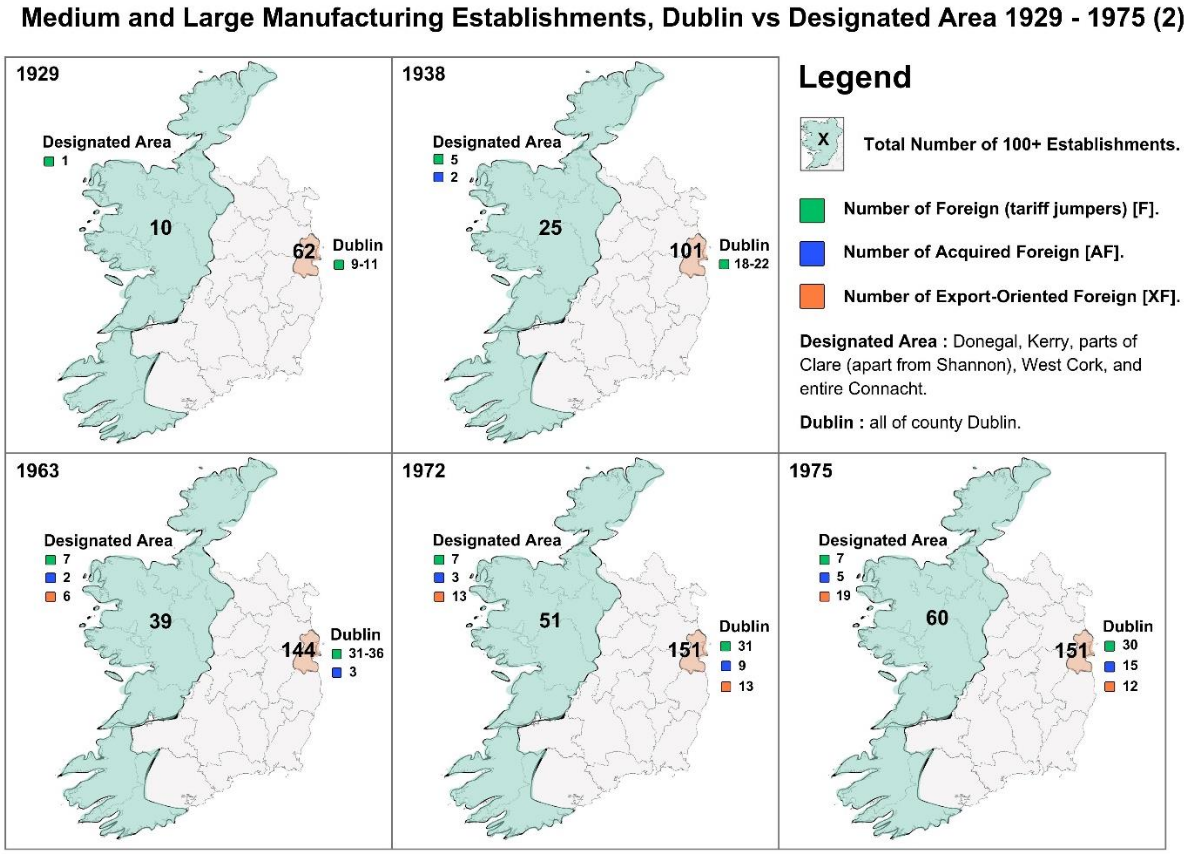
CHART 4:

Medium and Large Manufacturing Establishments, Dublin vs Designated Area 1929 - 1975 (1)



The contribution of foreign-owned firms to these developments is depicted in Chart 5. Dublin had more tariff jumping foreign firms throughout the entire period of the analysis. As early as 1963 the designated areas were ahead in terms of the number of export-oriented foreign projects that had been attracted to locate there. While Dublin had caught up by 1972, the periphery had pulled ahead again by 1975. The regional distribution of 100+ establishments is of course broader than that of the 500+ employee establishments. Nevertheless, the broad patterns and developments over time are similar in the two cases.

CHART 5:



Concluding Comments

Our most significant results arguably emerge from the study of the largest size category of establishments. We saw that these plants – employing a workforce of 500 or more – remained heavily concentrated in the four counties (Dublin, Cork, Louth and Offaly) that hosted such establishments in 1929. Seventy-five percent of large plants continued to be located in these counties in 1975. Most of the dispersion seen over the previous decade had been an outcome of the differential location pattern of new foreign firms.

Even within this highly geographically concentrated group, several individual manufacturing sectors remained particularly heavily concentrated in Dublin. These included bread, biscuits & flour confectionery; cocoa, sweets & chocolate confectionery; drink & tobacco; and paper, print & publishing. These sectors shed jobs over the 1960s and 1970s, partly though not wholly as a consequence of trade liberalisation. (Bread consumption per capita for example fell significantly over this period). The beef and dairy sectors, on the other hand, which were concentrated in regions other than Dublin, expanded significantly as a consequence of AIFTA and later of EEC accession. Quite apart from the influx of new foreign industries, changes in the sectoral structure of the economy contributed to the decline in Dublin's share of manufacturing employment.

A slightly different picture emerges when we treat all medium and large-scale establishments as a single group. From this perspective, the resistance of firms to establish beyond Dublin – and indeed to establish in the disadvantaged areas – diminishes monotonically over time.

It can be seen in both cases that while foreign tariff jumpers were much more likely to be located in Dublin than in the periphery, the opposite was the case for 'new' export-oriented foreign firms. Was this necessarily a consequence of regional policy? As Gillmor (1985: 241-242) notes, a range of factors were serving to reduce the disadvantages of peripherality over time. These included the low transport cost component of the newer light industries, the increased ease of contact with dispersed plants through modern communications technology, the improvement in the quantity and quality of services in provincial areas, the internal provision within some of the larger firms of the services which might have attracted others to major industrial centres, and the increased diseconomies of operating in the larger urban centres.[47]

As against this, he cites evidence that 'the percentage grants variable was the single most important factor affecting the pattern of location by area'. He also points to the fact that foreign firms established without grant aid were far more likely to be located in Dublin (Gillmor, 1985, pp. 245, 234).[48] A survey of industrialists conducted by Ó hUigínn (1972) showed that peripheral areas such as Donegal and Connacht were still regarded as lagging substantially behind the east of the country on issues such as the availability of skilled labour and ease of access to intermediate inputs and destination markets.

Further existing results relate to the relationship between firm location and firm performance. If there were disadvantages to peripherality, one might expect these to be reflected in poorer performance unless fully offset by regional assistance. The Survey of Grant-Aided Industry (1967, p.34) found little difference in the failure rates of projects located in the designated areas and elsewhere. McAleese and Counahan (1979), in a study of 'new industry' overseas firms, find no significant relationship between designated-area location and employment performance. O'Farrell (1976), in an analysis of 'new industry' establishments, finds that though the proportion of closures in designated areas is higher than in non-designated areas, the difference is not statistically significant, leading him to speculate that the higher level of grants received by plants locating in the designated areas 'may help to improve their viability, especially in the early years'. These are the sorts of issues that might potentially be revisited as we continue to develop the database.

[47] Changes in comparative costs were also leading to the migration of industry from city centres in Ireland and elsewhere over this period (see references in MacLaran and Beamish, 1985).
[48] Though Meyler and Strobl (2000) do not find their particular grant measure to be of significance, their econometric analysis suggests that regional industrial policy had a substantial impact on job generation in the designated areas.

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APPENDIX:
Details of establishments of 100+ persons engaged in the 'Designated Areas'

Colour coding:
White = Indigenous
Pink= Foreign tariff jumper (F)
Brown = export-oriented foreign (XF)
Light Blue = brownfield acquisition by foreign firm when already of significance (AF)
Dark Blue = original (pre-Free State) foreign (OF)

SECTORS	1929	1938	1963	1972	1975
Food	**Kerry** 1. Slattery Bacon (Tralee) 2. Tralee Wholesale Co-Op Society	**Connacht** 1. Tuam Sugar factory 2. Castlebar Bacon 3. Pollexfen Flour (Sligo) **Kerry** 4. Slattery Bacon (Tralee) 5. Tralee Wholesale Co-Op Society	**Connacht** 1. Tuam Sugar factory 2. Erin Foods (Tuam) 3. Claremorris Bacon 4. Castlebar Bacon 5. Cook & McNeily / Denny (Sligo) 6. Pollexfen Milling (Sligo) **Kerry** 7. Denny (Tralee) 8. McCowen Grain (Tralee) 9. Cadbury (Rathmore, Kerry)	**Connacht** 1. Tuam Sugar factory 2. Erin Foods (Tuam) 3. Pollexfen Flour (Sligo) 4. Castlebar Bacon 5. Claremorris Bacon 6. Hanley's (Roscommon) 7. Denny's Sligo 8. Connacht Foods Milk plant, Ballaghaderreen, (Roscommon) **Donegal** 9. Milford Bakeries **Kerry** 10. Cadbury (Kerry) **West Cork & West Clare** 11. Drinagh Co-op 12. Fastnet Vegetable Processing Plant (Skibereen)	**Connacht** 1. Irish Sugar (Tuam) 2. Erin Foods (Tuam) 3. Western Pride bread, Ballinrobe, Mayo 4. Castlebar Bacon 5. Claremorris Bacon 6. Denny Bacon (Sligo) 7. Connacht Foods, Ballaghaderreen, Roscommon 8. Hanley's, Roscommon (bacon canning) **Donegal** 9. McKinney, Donegal **Kerry** 10. Denny's (Tralee, Kerry) 11. Cadbury, Rathmore 12. North Kerry Creameries, Listowel **West Cork & West Clare** 13. Drinagh Co-op (Dunmanway) 14. Fastnet Veg Processing (Skibereen)
Drink & Tobacco				**Connacht** 13. John Egan/Coca Cola, Tuam	**Connacht** 15. Coca Cola / John Egan, Tuam, Galway

Textiles & Clothing	**Connacht** 3. Galway Woollen Mills 4. Providence Woollen Mills (Foxford) **Donegal** 5. McDevitt Hosiery (Glenties) 6. Templecrone Co-op 7. Convoy Woollen Mills 8. Porter & Co. (Castlefin) 9. Foyle Shirt & Collar (Lifford) **West Cork & West Clare** 10. Thomond Woollen Mills, Sixmilebridge	**Connacht** 6. Les Modes Modernes (Galway) 7. Providence Woollen Mills (Foxford) 8. Irish Sewing Cotton (Westport) **Donegal** 9. Convoy Woollen 10. Letterkenny Hosiery 11. McCarter (Buncrana) 12. McDevitt Hosiery (Glenties) 13. Templecrone Co-op 14. Tillie & Henderson (Carndonagh) – reopen factories to tariff jump 15. Austin Moore & Co. (Buncrana) 16. Porter & Co. (Castlefin) 17. Foyle Shirt & Collar (Lifford) **West Cork & West Clare** 18. Thomond Woollen Mills, Sixmilebridge	**Connacht** 10. Les Modes Modernes (Galway) 11. Galway Textile Printers Ltd 12. Providence Woollen Mills (Foxford) 13. Michael Anthony Ltd, Galway 14. Westport Textiles 15. Irish Sewing Cotton (Westport) 16. Western Hats (Castlebar) **Donegal** 17. Convoy Woollen 18. McCarter (Buncrana) 19. Porter & Co. (Castlefin) 20. Austin Moore & Co. (Buncrana) 21. Magee (Donegal) 22. McDevitt Hosiery (Glenties) **West Cork & West Clare** 23. Braids, Ennis	**Connacht** 14. Westport Textiles 15. Providence Woollen Mills (Foxford) 16. Irish Sewing Cotton (Westport) 17. Galway Textile Printers Ltd 18. Bruno (Ire) (Galway) **Kerry** 19. Pretty Polly **Donegal** 20. Convoy Woollen 21. GT Carpet, Gweedore 22. Ambler of Donegal, Gweedore 23. McCarter (Buncrana) 24. McDevitt Hosiery (Glenties) 25. Herdmans Mills, Ballybofey 26. Erne Hosiery Co Ltd, Ballyshannon; 27. Magee (Donegal) 28. Clubman Shirts Ltd. Buncrana 29. Porter & Co. (Castlefin) 30. Donegal Shirt Co (prev. Foyle Shirt), Lifford 31. Tillie & Henderson, Carndonagh **West Cork & West Clare** 32. Kire Manuf., Kinsale 33. Ix Textiles, Sixmilebridge	**Connacht** 16. Ix Textile Factory, Tuam, Galway 17. Bruno (Ireland), Galway 18. Galway Textile Printers 19. Providence Woollen Mills (Foxford) 20. Ballina Leisurewear 21. Westport Textiles factory 22. Irish Sewing Cotton (Westport) **Kerry** 23. Pretty Polly **Donegal** 24. Clubman Shirts/Dublin Shirt & Collar, Buncrana 25. Convoy Woollen 26. GT Carpet, Gweedore 27. McCarter (Buncrana) 28. Porter and Co, Castlefin 29. Herdmans Mills, Ballybofey 30. Nena Models, Castlefin 31. Magee (Donegal) 32. Tillie & Henderson (Éire) Ltd, Carndonagh 33. McDevitt Hosiery (Glenties) 34. Erne Hosiery Co Ltd, Ballyshannon 35. Donegal Shirt Co (prev. Foyle Shirt), Lifford **West Cork & West Clare** 36. Kire Manufacturing, Kinsale 37. Ix Textiles, Sixmilebridge **Kerry** 38. Sunbeam, Tralee, Kerry
Footwear		**Connacht** 19. Reliable Shoe (Westport) 20. Sligo Shoe **Kerry** 21. Hilliard & Palmer (Killarney) 22. Traly Footwear	**Connacht** 24. Reliable Shoe (Westport) 25. Dubarry Shoes, (Ballinasloe, Galway) **Kerry** 26. Traly Footwear 27. Hilliard & Palmer (Killarney)	**Connacht** 34. Dubarry Shoes (Ballinasloe, Galway) **Kerry** 35. Traly Footwear 36. Brittons (prev. Hilliard & Palmer) (Killarney)	**Connacht** 39. Dubarry Shoes (Ballinasloe, Galway) **Kerry** 40. Traly, Kerry
Paper & Printing					

Clay, Glass & Cement			**Connacht** 28. Royal Tara China, Galway **West Cork & West Clare** 29. Celtic Ceramics (Kilrush)	**Connacht** 37. Galway Crystal 38. Royal Tara China (Galway) **West Cork & West Clare** 39. Celtic Ceramics (Kilrush)	**Connacht** 41. Royal Tara China (Galway) 42. Galway Crystal 43. Galway Concrete **West Cork & West Clare** 44. Celtic Ceramics (Kilrush)
Wood & Furniture		**Connacht** 23. Hunters Woodworkers (Galway)	**Connacht** 30. Corbett & Sons Ltd, Galway 31. GWI Ltd. (Sligo) **West Cork & West Clare** 32. Chipboards, Scariff	**Connacht** 40. G.W.I. Ltd (Sligo) **West Cork & West Clare** 41. Chipboards, Scariff	**Connacht** 45. GWI Ltd (Sligo) **West Cork & West Clare** 46. Chipboards, Scariff, Clare
Metals & Engineering		**Connacht** 24. Galway Foundry & Eng	**Connacht** 33. Potez (Galway) 34. Crown Equipment/Steinbock (Galway) 35. Basta (Sligo) 36. Industrial Foundries (Sligo) 37. General Plastics (Leitrim) **Kerry** 38. Liebherr, Killarney	**Connacht** 42. Standard Pressed Steel (Galway) 43. Basta (Sligo) 44. Digital Equipment (Galway) 34. Crown Equipment/Steinbock (Galway) 46. Hanson (Sligo) **Kerry** 47. Kingdom Tubes, Tralee 48. Liebherr, Killarney	**Connacht** 47. Crown Equipment/Steinbock (Galway) 48. Digital Equipment (Galway) 49. SPS (Galway) 50. Northern Telecom (Galway) 51. Dart/Pulse Engineering (Galway) 52. Shamrock Forge and Tool Company (Ballina) 53. Travenol (Baxter) Laboratories, Mayo 54. Basta (Sligo) 55. Hanson (Sligo) 56. Stainless Steel Products, Vidor Factory, Roscommon **Kerry** 57. Kingdom Tubes, Tralee 58. Liebherr, Killarney
Chemicals & Misc.		**Connacht** 25. McDonogh Fertiliser (Galway)	**West Cork & West Clare** 39. Pearl Factory, Ennis	**Connacht** 49. McDonogh Fertiliser (Galway) 50. SNIA, Sligo 51. Mayco, Ballina	**Connacht** 59. A.T. Cross (Ballinasloe) 60. Mayco (Ballina, Mayo)
TOTAL PERIPHERY	**10**	**25**	**39**	**51**	**60**