IMPLEMENT
CONSULTING GROUP_

Google

Enabling an AI-first and future ready Irish economy

Google Economic Impact Report
Ireland 2025

An Implement Consulting Group study
developed in partnership with Google

July 2026

Foreword

Ireland has established itself as one of Europe's most open, digital, and globally connected economies. For more than two decades, Google has grown alongside this vibrant ecosystem, evolving from a team of five into an employer supporting more than 18,600 total jobs across the country.

Our inaugural Google Ireland Economic Impact Report, developed by Implement Consulting, quantifies this partnership. In 2025 alone, Google contributed €10.5 billion to the Irish economy, driven by our products, infrastructure, offices and cloud-enabled productivity tools.

Importantly, the report also highlights our deep community and social impact. Beyond our real estate / physical footprint, Google's lasting legacy in Ireland is built on people – reflected in our work to help nearly 600,000 citizens build the digital and AI skills needed to succeed in the future economy.

Looking ahead, Ireland is uniquely positioned to lead the global AI era. Capturing the €40–45 billion economic potential requires bridging the adoption gap for small businesses, expanding digital skills, and fostering a predictable and simplified regulatory environment that supports long-term competitiveness. Ultimately, our goal is to ensure the benefits of AI are accessible to everyone, driving growth and opportunity across Ireland.

Vanessa Hartley

Head of Google Ireland

The analysis has been developed by Implement Economics using an economic impact framework aiming to provide a transparent assessment of Google's economic and societal role in Ireland. Find full methodology in the Annex.

Products & Platforms

Creating value by connecting users, advertisers and ecosystems

AI & Cloud

Enhancing Irish productivity through AI and Cloud technology

Infrastructure & Offices

Enabling the Irish Digital Economy with Frontier Infrastructure and Service

Google Ireland's economic impact

Social impact

Building digital skills and supporting the Irish Tech and NGO landscape

Summary of Implement Consulting research findings

Google enables an AI-first and future ready Irish economy

Google's contribution in Ireland:

GROWTH: More than €10 billion to Irish gross domestic product (GDP) in 2025 corresponding to nearly €8 billion in gross national income (GNI)

Google is estimated to contribute EUR 10.5 billion to Irish gross domestic product (GDP) or EUR 7.6 billion in gross national income (GNI). Google's GDP contribution comes from three main drivers:

- EUR 4.2 billion from Products & Platforms
- EUR 3.0 billion from AI & Cloud
- EUR 3.3 billion from Infrastructure & Offices.

EMPLOYMENT: Supporting more than 18,600 jobs in Ireland

Ireland is home to Google's headquarters for Europe, Middle East and Africa (EMEA) and a European data centre hub.

- Google Ireland supported a substantial employment footprint of 9,400+ jobs, comprising 6,000+ employees and 3,400+ temporary workers, vendors and contractors.
- In addition, Google supported 9,200+ jobs in the rest of the economy.

INNOVATION: Backing innovation in Ireland with €2 billion in R&D investment since 2014

Google Ireland has over 850 employees working on R&D activities and invested EUR 304 million in R&D in 2024 alone.

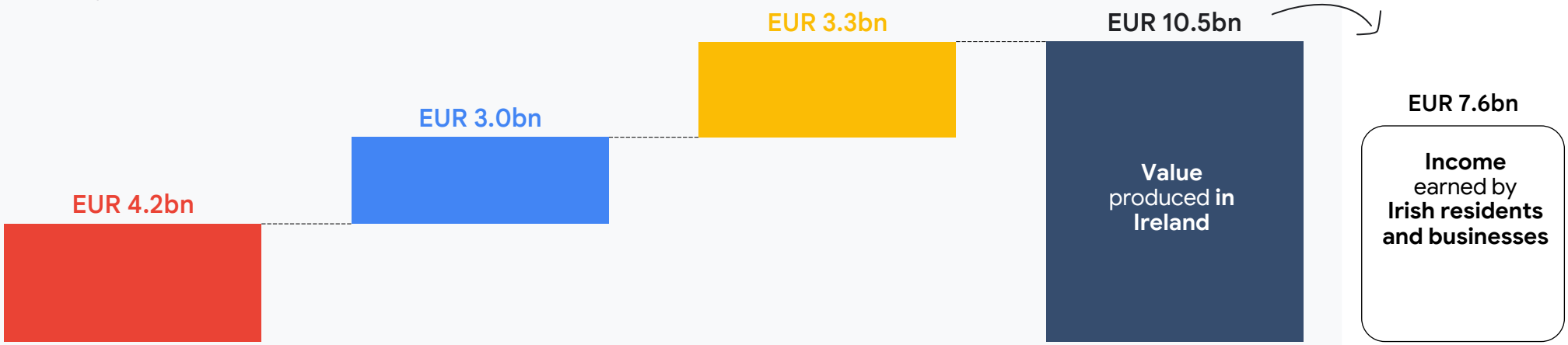
SKILLS: Upskilling 600,000+ people in digital and AI capabilities since 2016

Google Ireland also contributes to the local economy, building local digital and AI skills and supporting the Irish Tech and NGO landscape.

Summary of Implement Consulting research findings

Google contributed €10 billion to Ireland's economy and supported 18,600 jobs in 2025

Google's estimated GDP contribution to Ireland
EUR billion, 2025



Products & Platforms

Google Products & Platforms help businesses in Ireland reach customers; creators monetise content and users access information, services and markets more efficiently

AI & Cloud

Google AI & Cloud technologies contribute by enabling productivity gains for companies and public institutions in Ireland

Infrastructure & Offices

Google's data centre, offices and local operations generate direct activity in Ireland and support wider supply-chain and household spending effects

Total GDP contribution

Google's total estimated contribution to Irish GDP

Total GNI contribution

Google's estimated GNI contribution

Social impact

In addition to the economic contribution, Google Ireland supports local communities through philanthropy, upskilling programmes, volunteering and community partnerships

18,600+ jobs supported by Google in Ireland

Full methodology in the annex of the report

Social impact

Google supports key Irish political priorities through the digital upskilling of +600,000 people, dedicated support to Irish tech startups, and €133M philanthropic giving

Digital upskilling of +600,000 Irish people across life stages

273,000 individuals

Trained in digital skills since 2016, helping Irish businesses build digital and AI capabilities

26,000 young people

Supported through classroom AI literacy programmes and targeted scholarships for students from under-represented backgrounds

326,000 primary and secondary students

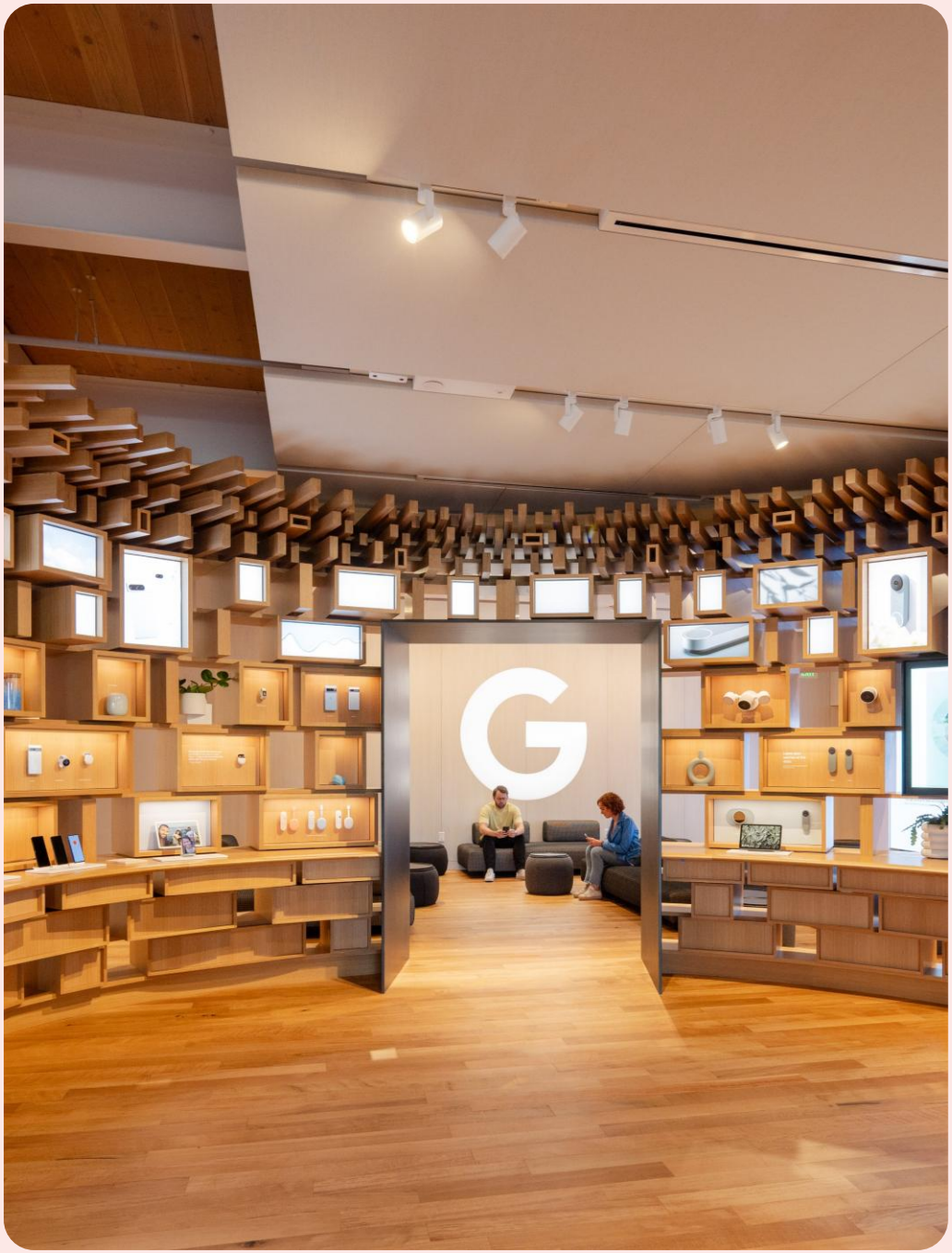
Helped across 1,700 schools since 2019, equivalent to more than 30% of Irish Primary and Secondary Schools, through programs focused on topics like digital confidence and online safety awareness

10+ years

Of dedicated support to Ireland's startup landscape through hub partnerships, mentoring platforms, data and advocacy

EUR 133 million

Given to communities through direct philanthropy cash grants, personal donations and non-profit grants, in combination with 226,000 volunteering hours over the years



Part 1

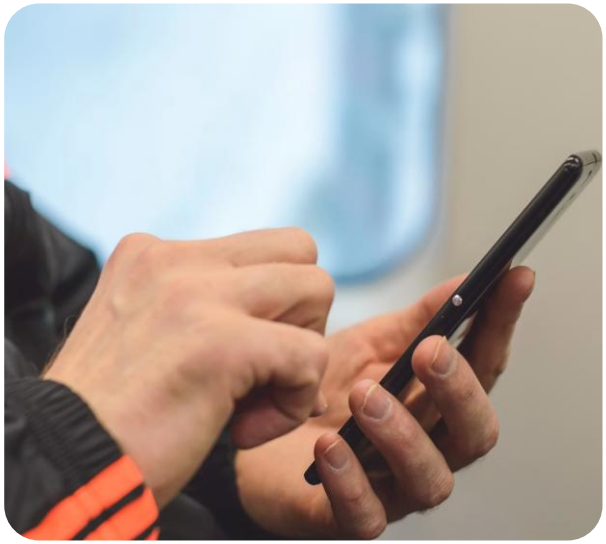
Products & Platforms

Creating Value by Connecting Users, Advertisers and Ecosystems

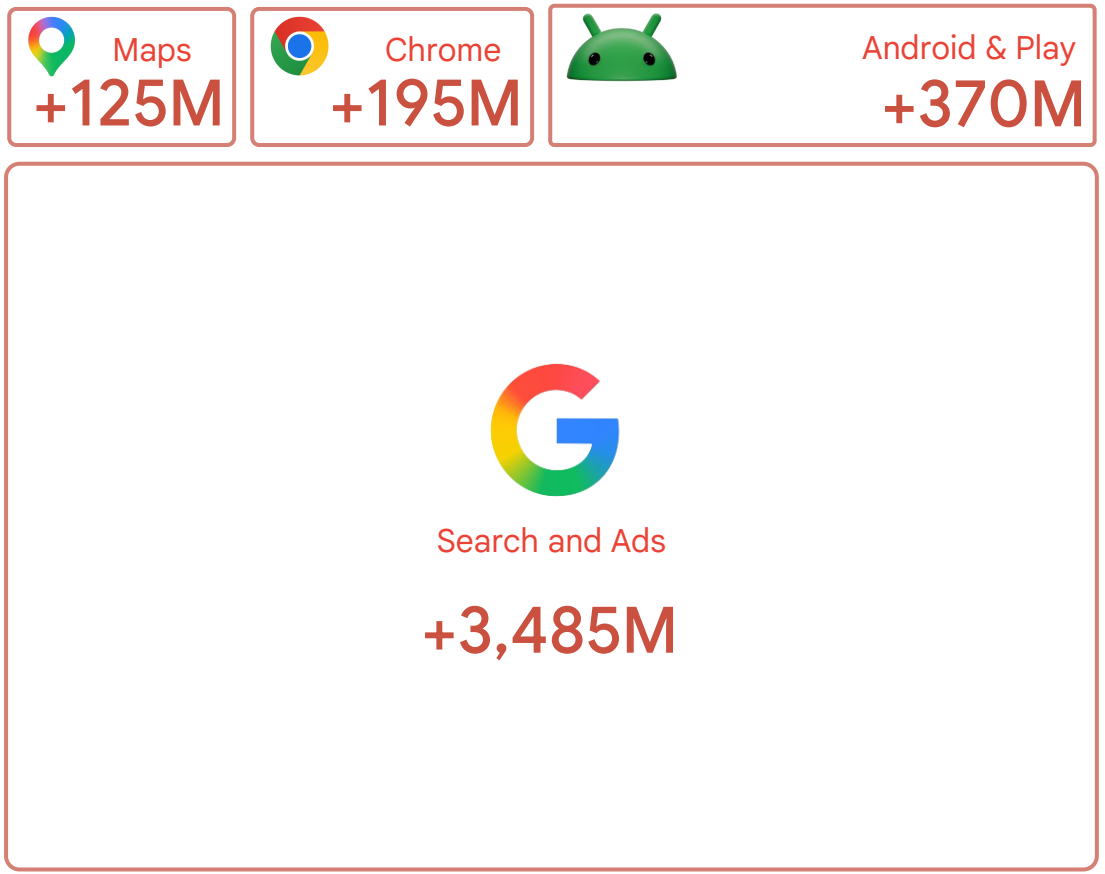
Google products and platforms contributed €4.2bn to Irish GDP in 2025

In 2025, Google products and platforms contributed 4.2 billion EUR to the Irish economy. The main impact is from Search and Ads supporting both productivity of Irish workers and driving sales growth of Irish online advertisers. Google's Android and Play platforms are supporting the Irish app developer ecosystem, while Chrome and Maps are driving productivity for its users.

In addition to the economic impact for Irish firms, Google Ireland is also the EMEA headquarters. Dublin functions as the operational gateway facilitating the benefits of Google's products for firms in the EU single market and a region covering over two billion people. Impacts outside Ireland are not quantified in this report.



Google's contribution to Irish GDP from products and platforms
EUR million, 2025



Google's products and platforms facilitate interactions across users, ecosystems, and advertisers

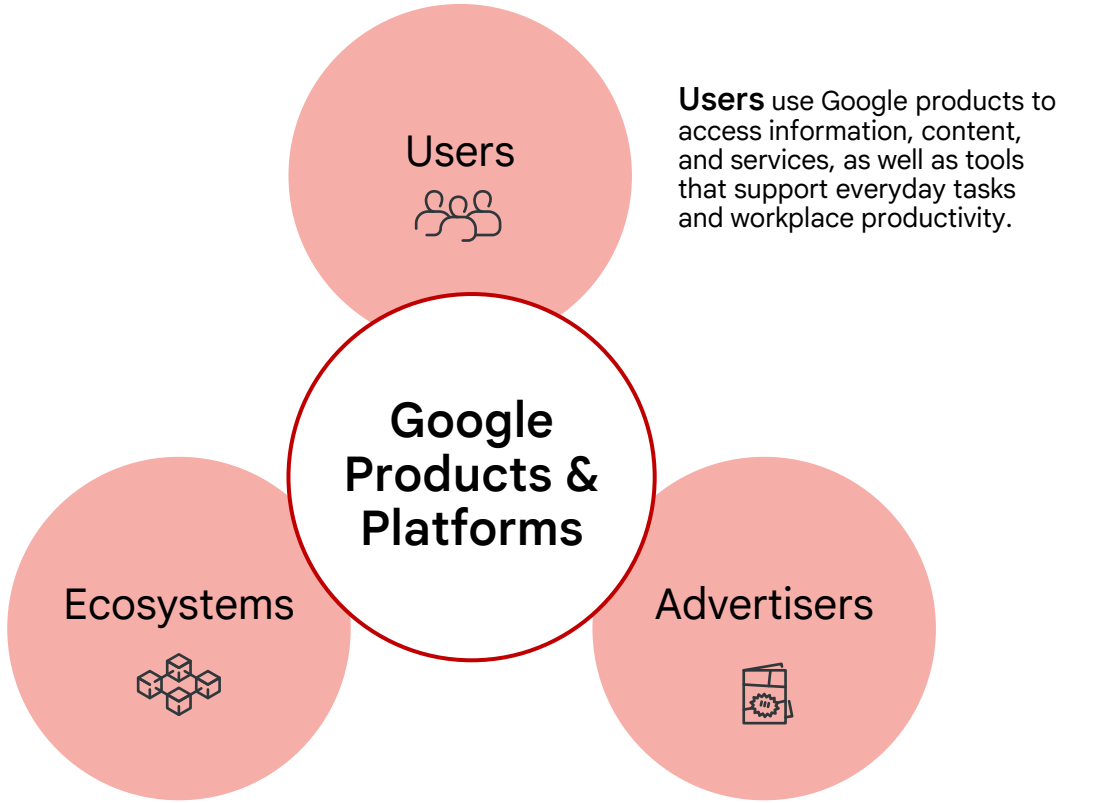
Google's products and platforms connect three key groups: users, advertisers, and ecosystems:

- **Users** access free tools, information, and services that support everyday tasks and productivity.
- **Advertisers** fund these services through Google Ads, enabling targeted campaigns and measurable reach.
- **Ecosystems** of developers and creators use Google platforms to build, share, and scale content and products.

Google's products and platforms contribute to the economy through three main channels: **productivity improvements** experienced by users as they can carry out tasks more efficiently, **increased sales** for advertisers marketing their products and services using Google ads and **revenue generated** in the ecosystem for developers, creators and publishers.

Most of Google's platforms generate economic activity for all three key groups either directly or indirectly. This economic impact report only quantifies the ecosystem impacts when there is a financial payment between Google and the developer or creator (see full methodology in Annex).

Google products and platforms enable users, advertisers and ecosystems



Google Search and Ads contributed €3.5bn to Irish GDP by helping businesses reach their customers and speeding up information retrieval

Since its launch in 1998, Google Search has played a key role in the Irish digital economy by connecting users with relevant information, products, and services. With personalised advertising and AI, Search is becoming more personalised, intelligent and agentic enabling better matching between user preferences and business offerings.

Google Search drives economic activity through two channels: by enabling businesses to reach their audiences through advertising and search, and by helping users retrieve information more efficiently, saving time looking for material. Together, these two effects contributed +3,485M EUR to the Irish GDP in 2025.

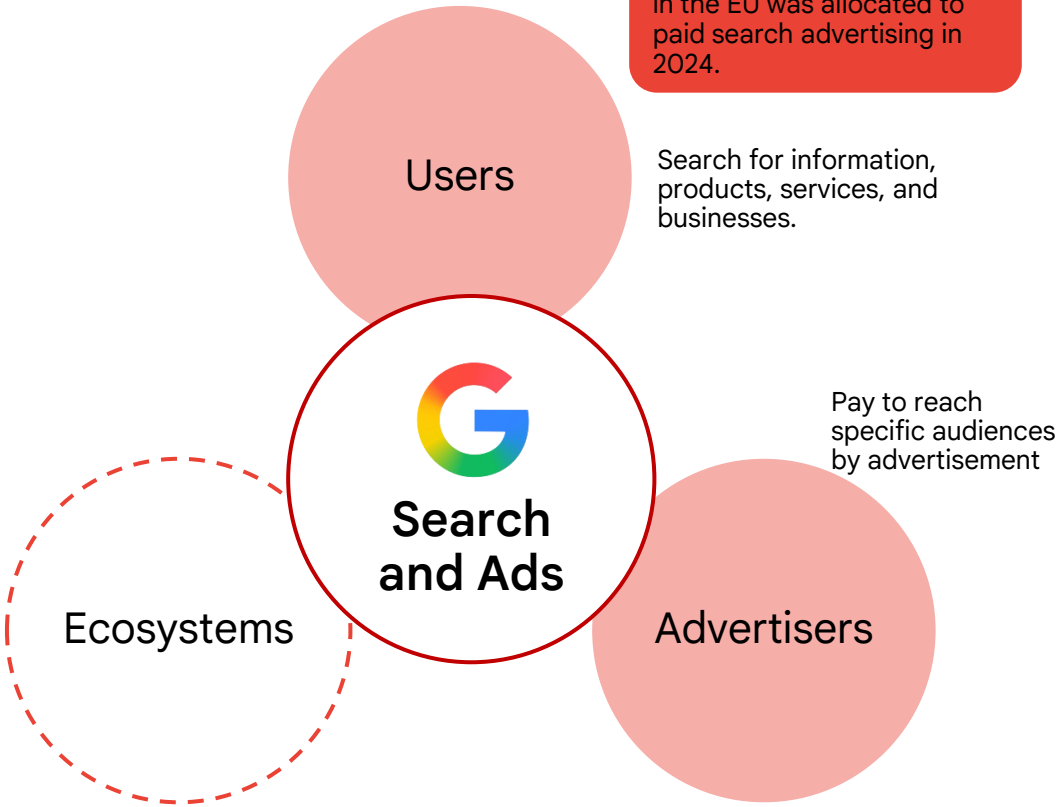
→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google Search and Ads

+3,485M EUR

41%

of digital advertising spend in the EU was allocated to paid search advertising in 2024.



Note: The GDP contribution includes the ecosystem impact of AdSense, which enables website owners to monetise digital content through ad placements, accounting for less than 1% of the contribution.
Source: Implement Economics based on Google, Eurostat, Varian (2011) and IAB Ireland (2026).

Android and Google Play contributed €370M to Irish GDP by helping app developers distribute and monetise apps

App stores such as Google Play are platforms that create value because they connect app users/buyers, app developers and advertisers. Google Play helps developers reach the right users, lowers entry barriers and creates trust and security for users.

App developers earn revenue in three main ways: Fees for apps via Google Play, contract work for businesses needing Android apps and advertising revenue from ads within their apps. In combination, this supports the ecosystem of app developers in Ireland. Together, these effects contributed +370M EUR to the Irish GDP in 2025.

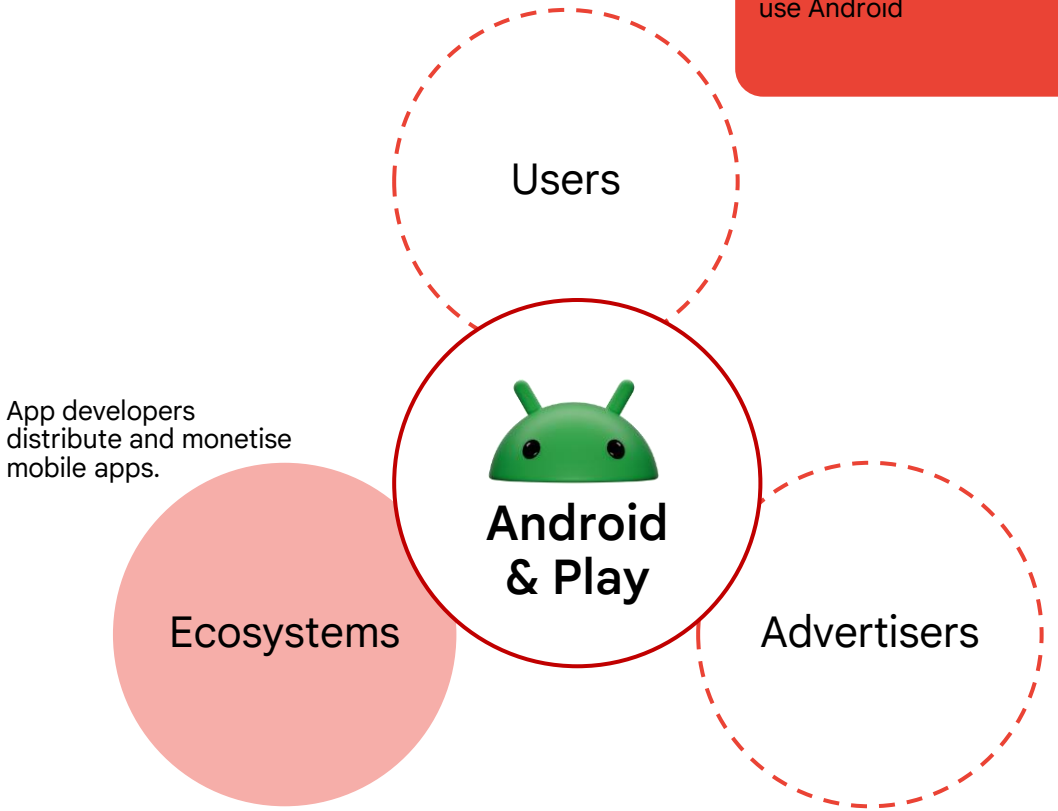
→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Android and Google Play

+370M EUR

59%

of mobile users in Ireland use Android



Source: Implement Economics based on (2022), Eurostat, Business of Apps (2026) and IAB (2025).

Fast and secure web access provided through Chrome and Chromium contributed €195M to Irish GDP

Businesses use browsers such as Chrome for everyday access to web-based information, applications and digital services.

Chrome is widely used by 67% of Irish browser users, and Irish businesses use Chrome for multiple business purposes.

Google Chrome creates value for users by improving worker productivity through reduced downtime, fewer browser-related frictions and lower time requirements for IT administration and software development. This effect contributed +195M EUR to the Irish GDP in 2025.

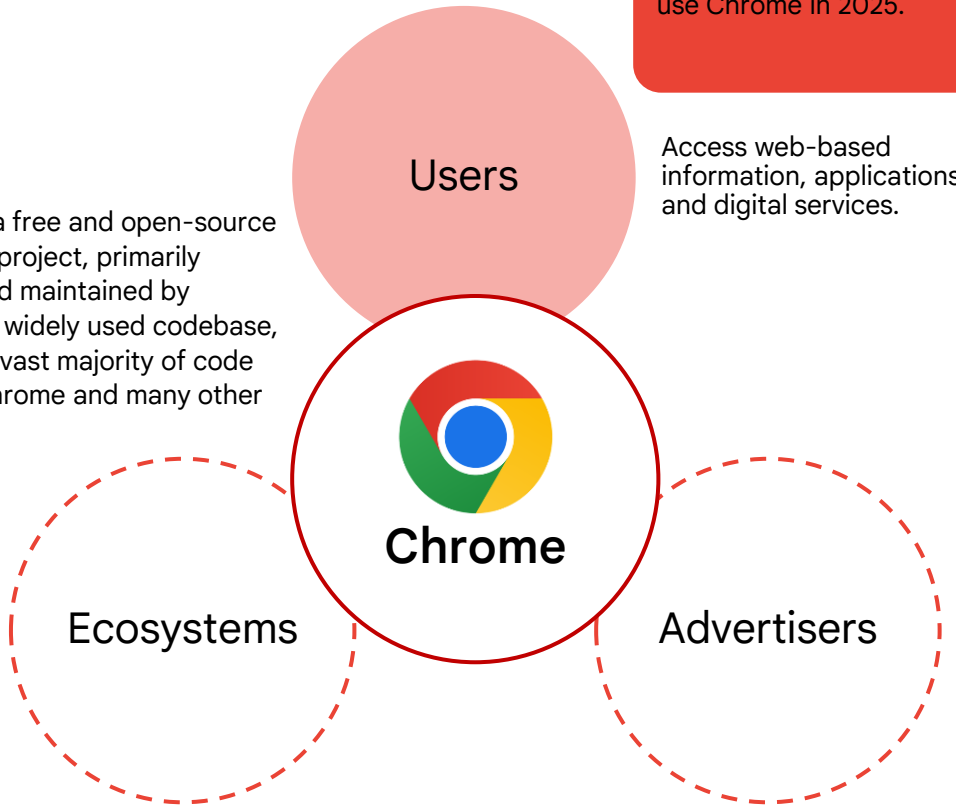
→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google Chrome and Chromium

+195M EUR

67%

of browser users in Ireland use Chrome in 2025.



Chromium is a free and open-source web browser project, primarily developed and maintained by Google. It is a widely used codebase, providing the vast majority of code for Google Chrome and many other browsers.

Source: Implement Economics based on Google, Eurostat and Forrester.

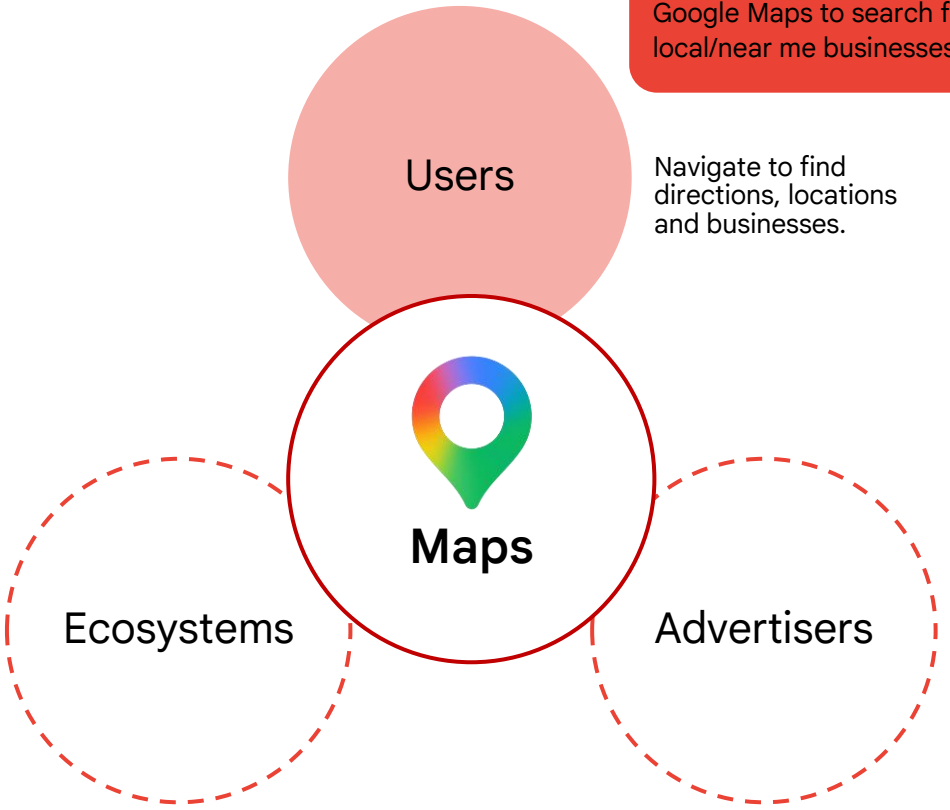
Google Maps enabled Irish users to travel more efficiently, contributing €125M to Irish GDP

Google Maps helps users navigate routes and find places and local businesses quickly and efficiently.

Google Maps drives economic activity by saving time on work-related travel, freeing up time for other work for both drivers and everyday business travellers. This effect contributed +125M EUR to the Irish GDP in 2025.

51%

of consumers mainly use Google Maps to search for local/near me businesses.

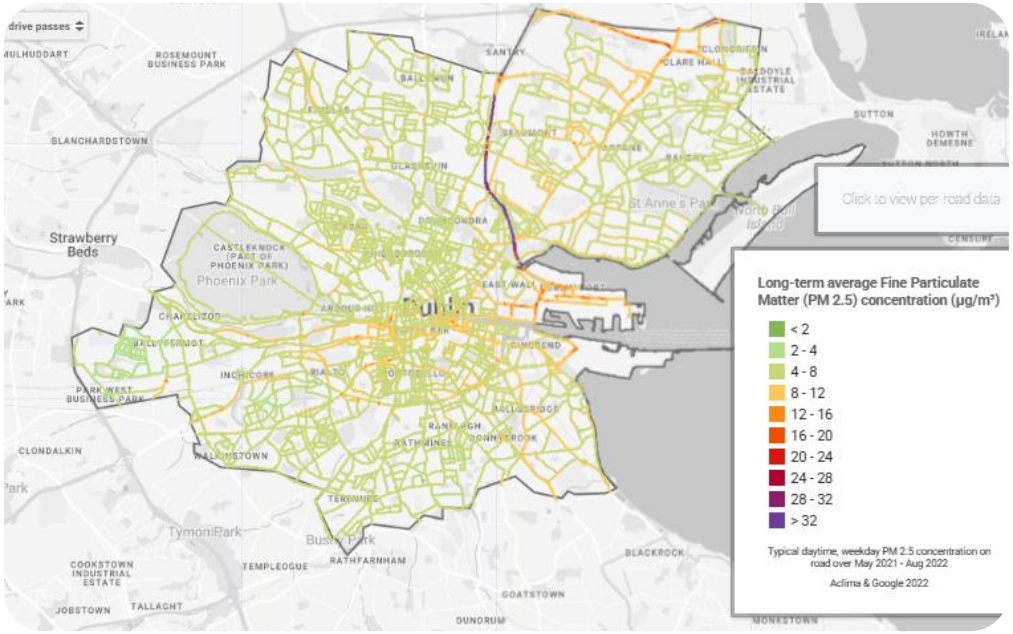


→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google Maps

+125M EUR

Source: Implement Economics based on Google, Eurostat, Arora et al. (2021) and Uberall.



→ Case

Google Street View car has helped Dublin City Council map air quality

The challenge

Air pollution is often highly local and can vary significantly from one street to the next, but cities typically lack the detailed, street-level data needed to understand where pollution hotspots are and how they change over time. This makes it difficult for city planners to target interventions, protect public health and track progress towards cleaner, low-carbon urban environments.

The solution

Partnering with Dublin City Council as part of the Smart Dublin program. Google's electric Street View car covered 30,000 km across Dublin City from May 2021 to August 2022, capturing **50 million hyperlocal air quality data points.**

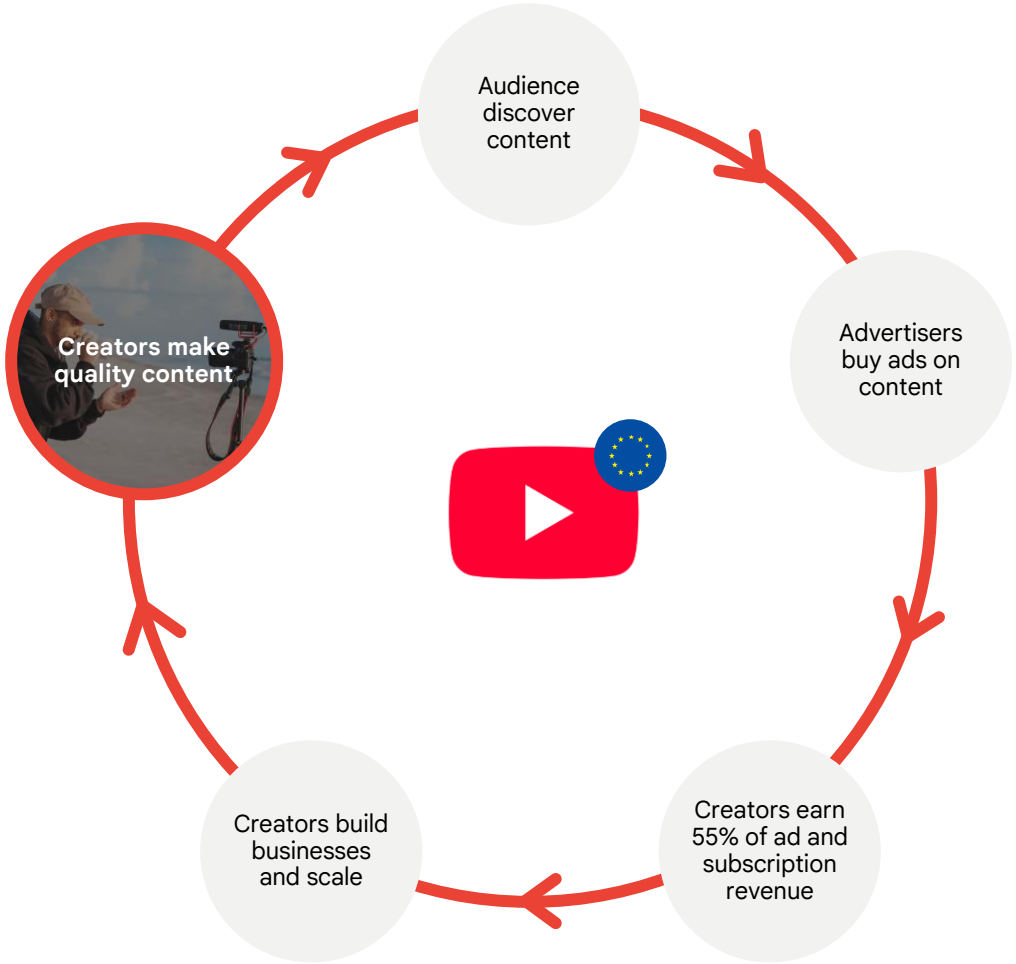
The impact

The data gives Dublin City Council street-level insights to identify where targeted interventions can have the greatest impact, serving as an important tool in reaching the Council's Climate Action Plan 2024–2029 goal of reducing greenhouse gas emissions by 51% by 2030.

More broadly, the tool Environmental Insights Explorer can help cities use hyperlocal air quality data to create healthier, more sustainable urban environments.

Source: Implement Economics based on Google, Dublin City Council (2025) and SmartDublin (2023).

The number of Irish YouTube channels earning over EUR 10,000 grew by over 10% in 2025



In the YouTube creative ecosystem, creators make content for their global audience, advertisers then buy ads to reach and engage. YouTube then shares more than half of the ad revenue back to creators.

In 2024, YouTube's creative ecosystem contributed over EUR 7bn to the EU's GDP and supported 200,000 FTEs. The number of Irish YouTube channels making EUR 10,000 or more in revenue increased by over 10% in 2025.

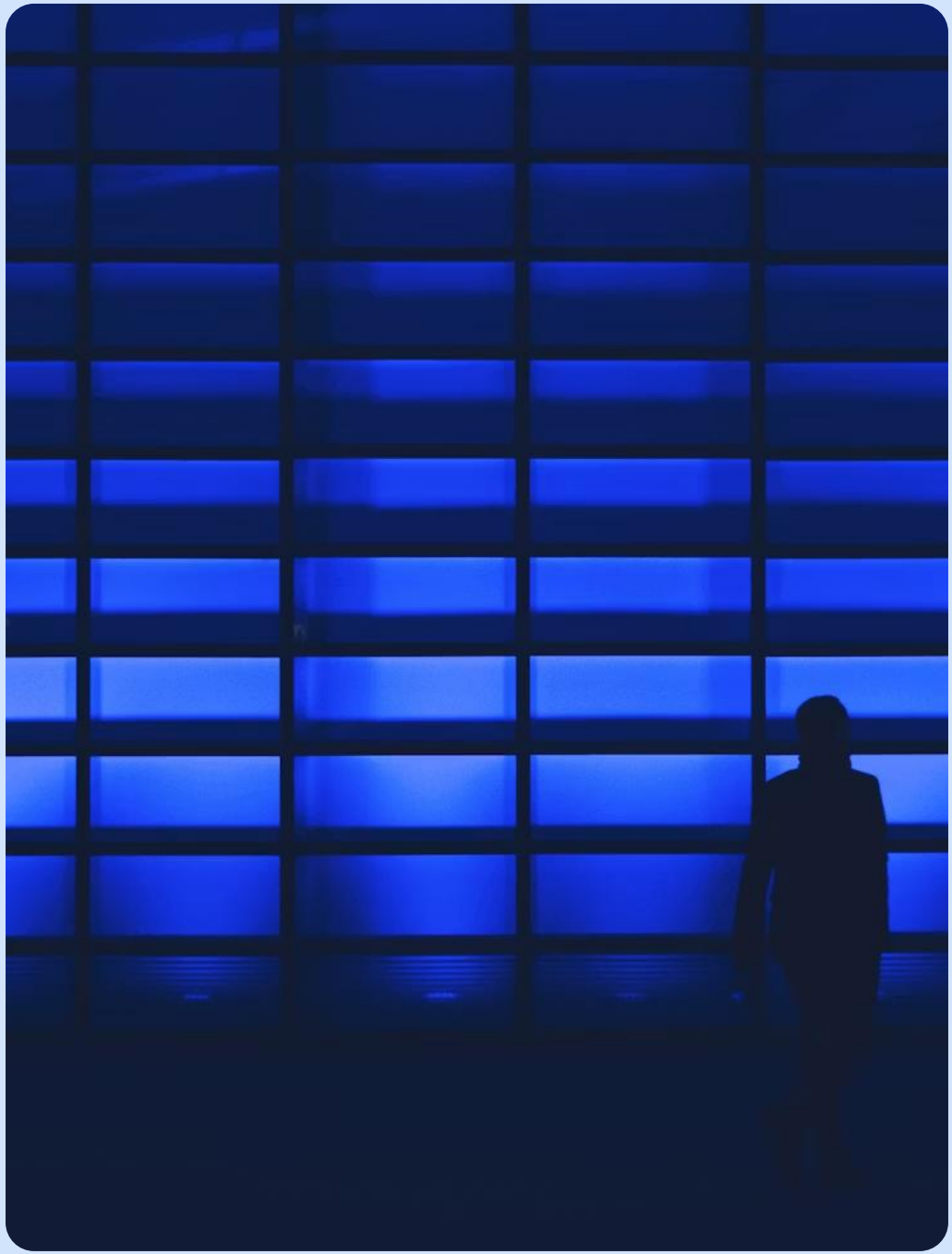
YouTube allows users to connect with and enjoy creator content that fits their unique personal preferences, creating a large network of content creators across topics and geographies.

Irish YouTube channels have uploaded over 1.6 million hours of content during 2025. YouTube helps Irish content creators reach a global audience with 90% of the watch time coming from outside Ireland. As of 2025, there are 5.5k Irish YouTube channels with +10k subscribers of which 100 channels have over 1 million subscribers each.

1.6M

hours of content was uploaded by Irish YouTube channels in 2025

Note: Full-time equivalent (FTE) are estimated from survey responses relating to the weekly hours spent working on YouTube and only includes creative entrepreneurs who spend at least eight hours per week working on YouTube.
Source: Implement Economics based on Oxford Economics and YouTube internal figures.



Part 2

AI & Cloud

Enhancing Irish Productivity through AI & Cloud Technology

> *Ireland's approach to AI, as laid out in our National AI Strategy, recognises the potential for the technology to enhance our socio-economic wellbeing as well as presenting great benefits for businesses in terms of productivity and innovation.*
>
> **Government of Ireland**
> in Progress Report on the National AI Strategy

Google AI & Cloud contributed €3bn to Irish GDP in 2025

In 2025, the benefits for Irish businesses from using Google's AI & Cloud solutions are estimated to contribute 3,045 million EUR to the Irish economy. AI and cloud technologies create value by helping businesses, public organisations, and developers adopt advanced digital tools, improve productivity, scale services, and accelerate innovation across the Irish economy.

Google's contribution to Irish GDP from AI & Cloud
EUR million, 2025

AI +895M

Cloud +2,150M

AI added an estimated €6 billion to Irish GDP in 2025, showing early signs of the GenAI take-off

The GDP potential for Ireland of widespread adoption of generative AI is estimated to be EUR 40-45 billion.

Based on the latest AI adoption rates for Ireland and new EIB research on the impact on productivity for AI adopters, we estimate that AI is already contributing nearly EUR 6 billion to Irish GDP in 2025.

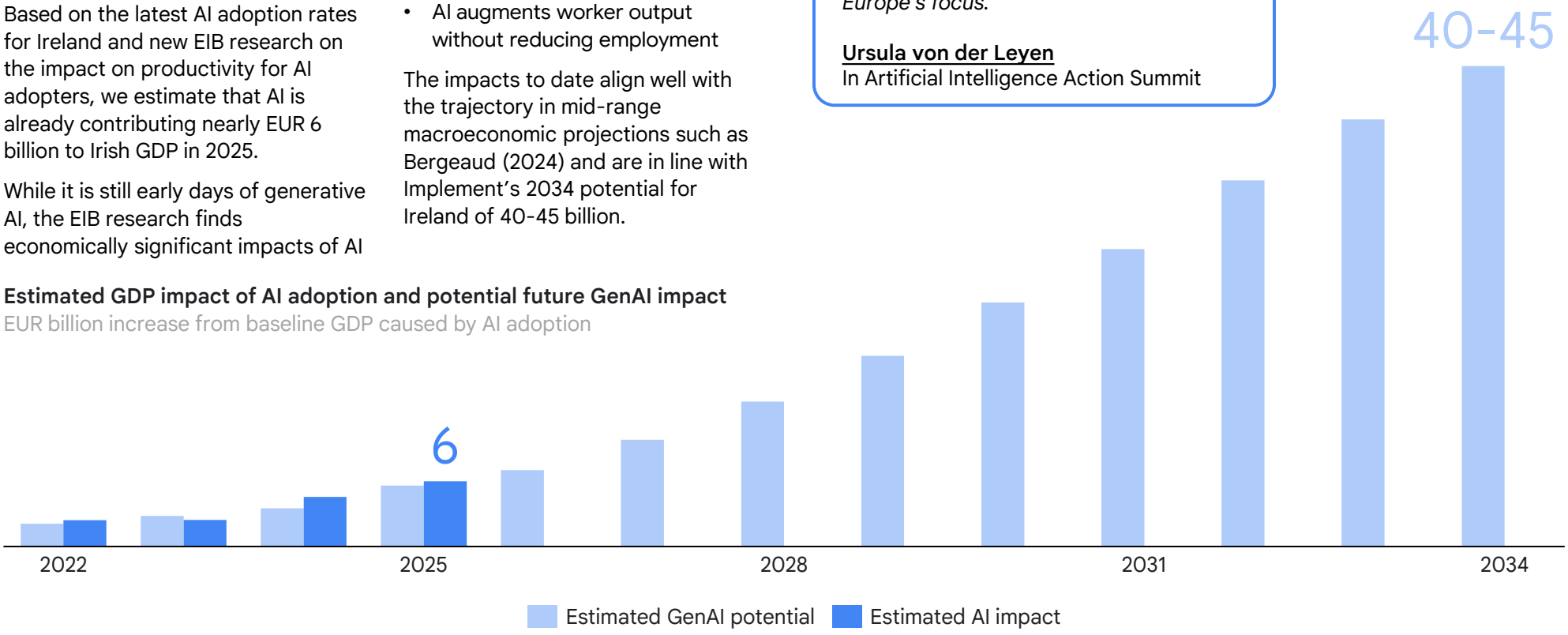
While it is still early days of generative AI, the EIB research finds economically significant impacts of AI adoption for European businesses:

- AI adoption increases labour productivity by 4% on average
- AI augments worker output without reducing employment

The impacts to date align well with the trajectory in mid-range macroeconomic projections such as Bergeaud (2024) and are in line with Implement's 2034 potential for Ireland of 40-45 billion.

> *AI has only just begun to be adopted in the key sectors of our economy, and for the key challenges of our times. This should be Europe's focus.*
>
> **Ursula von der Leyen**
> In Artificial Intelligence Action Summit

Estimated GDP impact of AI adoption and potential future GenAI impact
EUR billion increase from baseline GDP caused by AI adoption



Note: The estimated AI impact measures the current productivity contribution of all AI technologies (traditional AI, machine learning, RPA, and generative AI) to Irish GDP based on firm-level productivity impacts from the European Investment Bank (EIB). The GenAI potential by 2034 is from 'The Economic Opportunity of AI in Ireland' and estimates the potential of generative AI using the Goldman Sachs (2023) framework. The comparison should be interpreted as an indication of whether realised AI impacts are on track toward the projected GenAI potential, noting that the estimated impact for 2025 includes all types of AI while the estimated potential is from generative AI only.
Source: Implement Economics based on Implement modelling, Eurostat, EIB and Goldman Sachs.

Google estimated to account for approximately €900 million of Ireland's realised AI-driven GDP boost in 2025

Of the estimated nearly EUR 6 billion boost to Irish GDP from AI productivity gains for Irish firms as of 2025, we estimate that Google's contribution is EUR 0.9 billion. Google's contributions are driven by AI technologies like Gemini, that contribute to Ireland's economy by helping firms and organisations improve productivity through more capable digital workflows and stronger decision support.

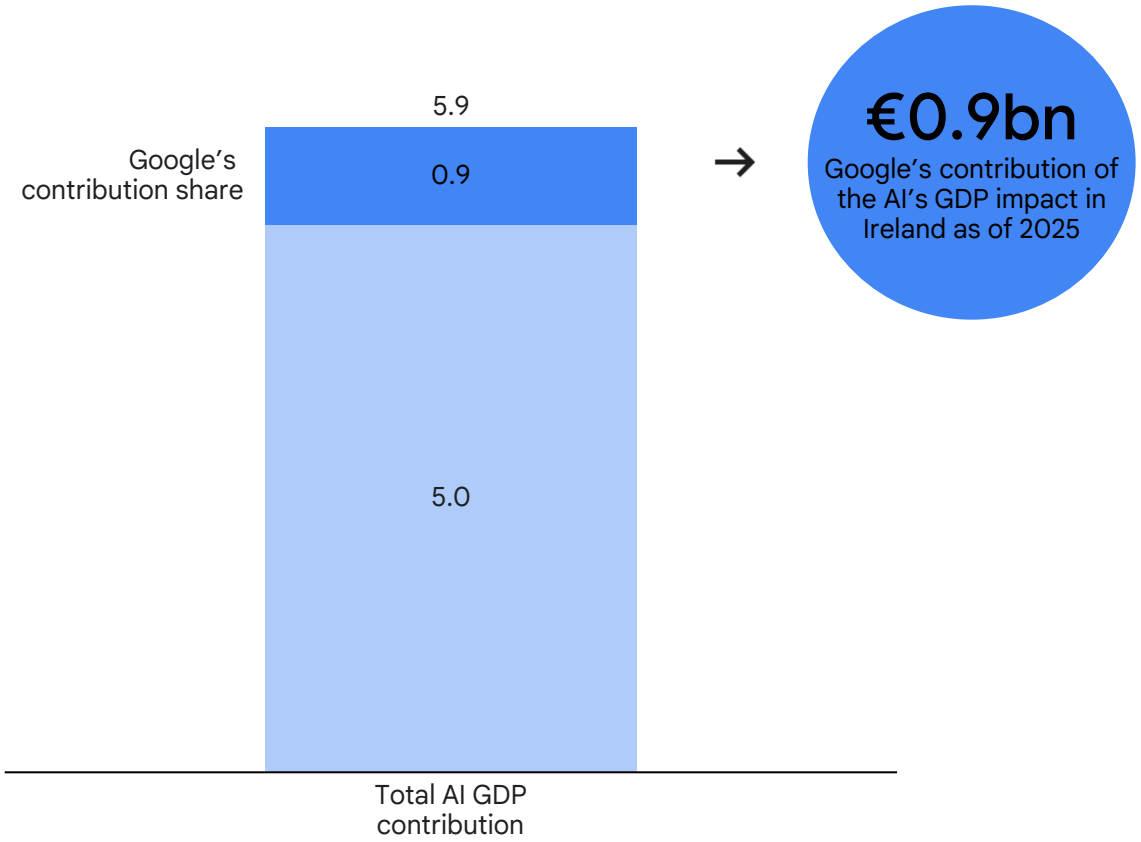
These estimates capture the current contribution from AI technologies already in use today, based on observed adoption and firm-level productivity relationships. As adoption deepens and AI becomes more embedded in daily workflows, the productivity effect is expected to grow further.

→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google's AI productivity boost

+895M EUR

Google's estimated GDP contribution from AI in Ireland
EUR billion, 2025



Note: AI's GDP contribution is the measured impact of AI technology on GDP through increased productivity for AI adoption by businesses and the public sector in Ireland. The so-called upstream impacts from building and operating data centers in Ireland are covered in section 3.
Source: Implement Economics' based on Eurostat, IoT Analytics, and EIB.

Gemini

Generative AI tools like Gemini are widely used for learning, assisting and saving time at work

AI adoption has accelerated rapidly since the emergence of generative AI. Ipsos global AI survey indicates that self-reported chatbot usage has jumped from 38% in 2023 to 62% in 2025.

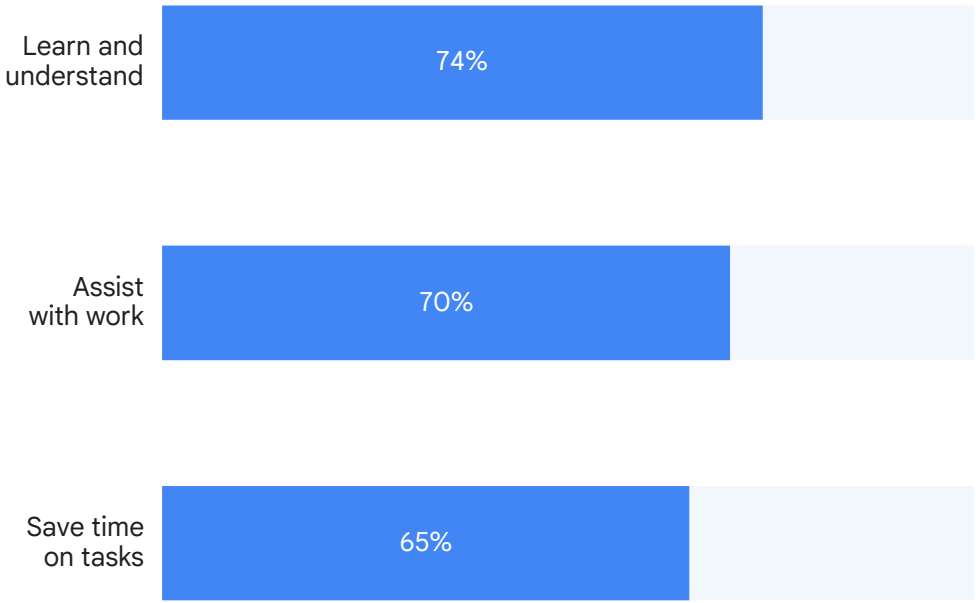
Google's Gemini is a widely used Generative AI tool with over 900 million monthly active users. Gemini's latest models combine frontier-level intelligence with exceptional speed, and help users write, plan, learn, summarise information, work with files, generate content and ask follow-up questions across everyday tasks.

The technology behind AI tools like Gemini builds on years of AI research. In 2017, Google researchers introduced the Transformer architecture in "Attention is All You Need", a breakthrough that became a foundation for modern generative AI models. Today, these assistants are evolving from systems that primarily answer questions to tools that can help users plan, reason through multi-step tasks and take supervised actions across apps and workflows.

+900 million

monthly active Gemini users globally in 2026

AI assistants like Gemini are already used to learn, work and save time
Share of AI users reporting use for different purposes in 2025



Note: Adoption and usage figures are based on the global Google & Ipsos Our Life with AI 2026 survey and represent global figures. Percentages reflect self-reported AI chatbot or AI application use. References to Gemini capabilities are based on Google product disclosures. The Transformer reference is based on Google Research's 2017 paper "Attention is All You Need".
Source: Implement Economics based on Google, and Ipsos.

AI's measured productivity shows signs of strengthening since the emergence of GenAI

Earlier research found that firm-level AI adoption is associated with a 2–3% increase in productivity. A study of German firms pre-2022 estimated productivity effects of AI of 2.7%. Newer research examining AI productivity effects across EU firms finds a higher effect of 4% using data through 2024.

This is still an early signal. Generative AI has only recently begun to be embedded into enterprise workflows at scale, and many firms are still in the experimentation or early adoption phase.

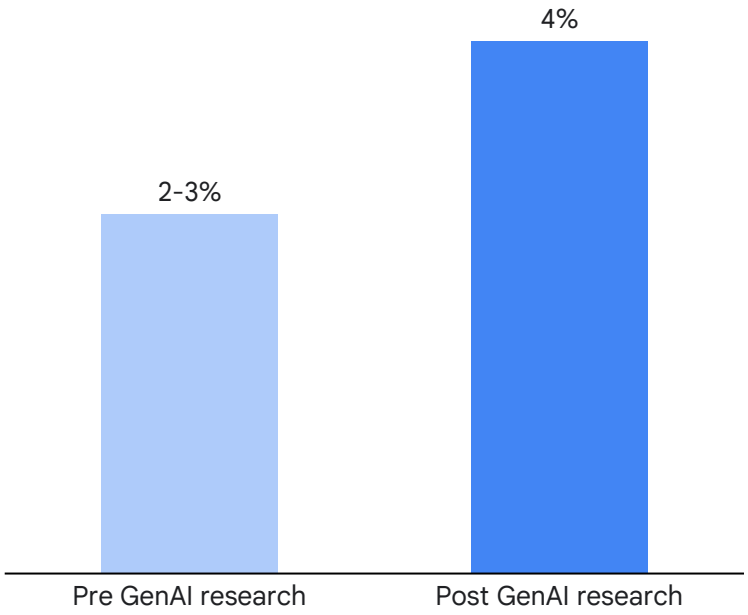
Research by the EIB also found that AI gains are most pronounced in medium and large firms and that the productivity gains are larger if firms carry out complementary investments in software and data or employee training. OECD also points to skills as key for AI adoption and finds that training increases the likelihood of positive outcomes of AI.

AI training and skills is thus a critical enabler. As shown in the section on social impacts, Google has trained more than 600,000 people in Ireland in digital skills since 2016.

We want all areas of the economy and society to benefit from digital and AI technologies – helping businesses to grow, improving our public services and ensuring everyone has the skills to succeed in a digital and AI-driven economy and society.

Department of the Taoiseach
In Digital Ireland press release

Estimated productivity gains from AI
%



Ibec's AI workplace research

- Use of AI doubled in 2025
- **80%** of employees say AI is improving their productivity
- **83%** said they need more AI training

Note: Pre GenAI research uses data prior to the GenAI commercial breakthrough in 2022 and can therefore not capture the effects of GenAI breakthrough. Post GenAI research uses data that covers both the pre- and post GenAI breakthrough and can therefore begin to capture some of the early effects of GenAI. The estimates shown pertain to empirical studies using firm-level evidence and instrumental variables to measure labour productivity effects of AI adoption. Related studies using alternative methodologies, e.g. task-based macro frameworks as in Acemoglu et al. (2022) or patent-based proxies for innovation as in Van Roy & Vertesy (2021) and Zhai & Liu (2023) provide similar sized impacts but cannot be directly compared due differences in approaches.
Source: Implement Economics based on EIB, gov.ie, OECD, Czarnitzki, Fernández and Rammer, Acemoglu et al., Zhai and Liu, Van Roy and Vertesy.

→ Case

How a Homegrown Natural Skincare Brand uses Gemini to Push for Global Growth

The challenge

Based in County Clare, founder Danilly Carvalho successfully scaled her natural skincare brand, IPERA, to over 40 stores across Ireland. However, local success hits a ceiling when expanding internationally: **global customers struggled to connect with the Irish name and visual identity**. To unlock global markets, the rural business faced a costly and complex rebranding and market analysis barrier.

The solution

Leveraging expertise gained via Google's "You're the Business" initiative, **Danilly deployed Gemini to drive a comprehensive digital transformation**. Gemini Canvas served as an AI co-creator, generating website prototypes, mocking up product labels, selecting a fresh colour palette and co-developing the universally resonant brand identity, IPERA.

The impact

The impact was immediate: sales surged within just a few months of the relaunch. Moving forward, IPERA utilises Gemini and NotebookLM to track international wellness trends, map competitor positioning, and synthesise complex consumer behaviour metrics, equipping this rural Irish enterprise with institutional-grade market intelligence to target global distribution.

> *With Gemini's market insights, I'm ready to share it with the world. Now, I have a product I'm really proud of, and a global strategy built directly from a seed of a local idea.*
>
> **Danilly Carvalho,**
> Founder, IPERA Natural Skincare

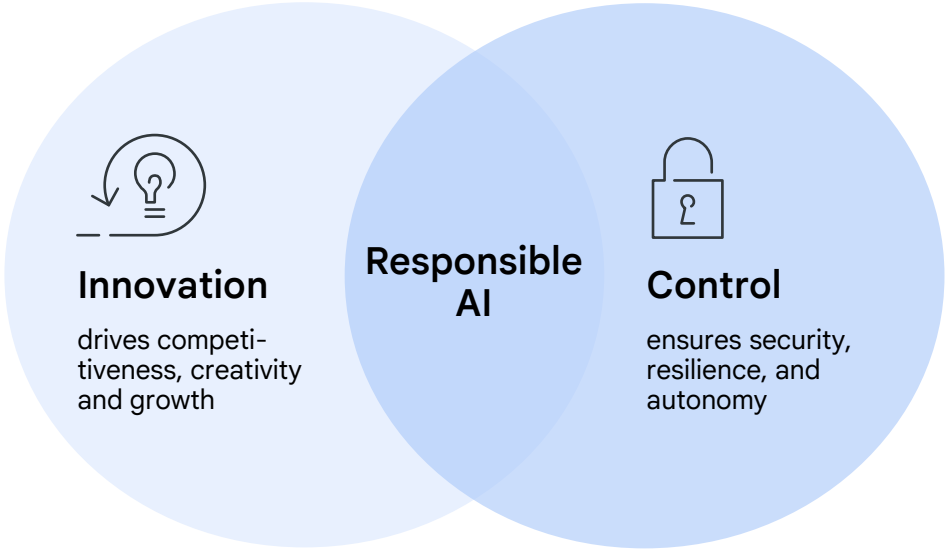
Source: Implement Economics based on Google.

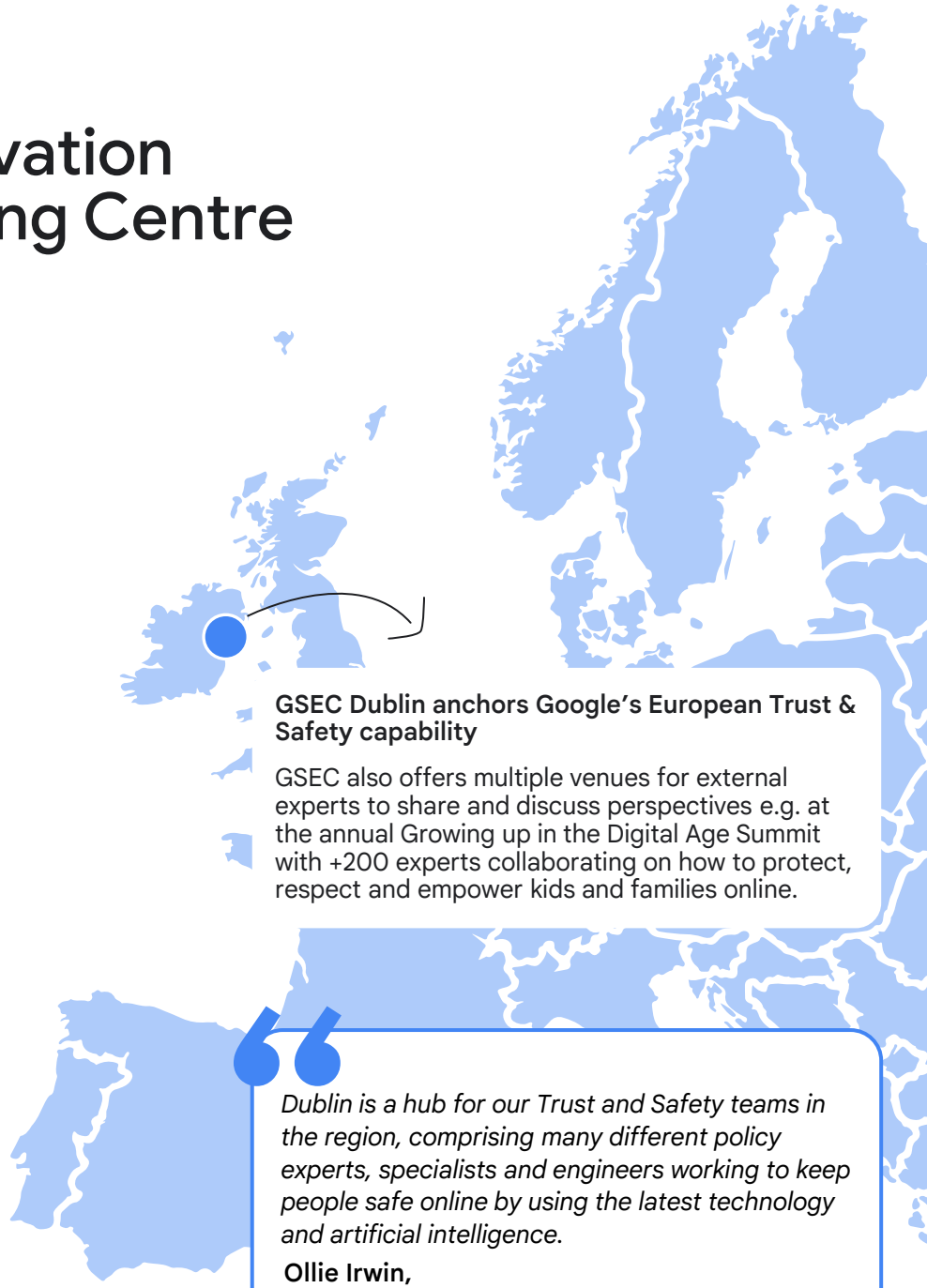
Google anchors responsible AI innovation through its Google Safety Engineering Centre

AI innovation is valuable only when it is developed and deployed with the right safeguards. Responsible AI means pairing advanced models, data systems, infrastructure and applications with controls that support safety, security, transparency and accountability.

In Europe, this work is anchored in the Google Safety Engineering Centre (GSEC) in Dublin launched in 2021. Located in Dublin, Google's European headquarters, it functions as a regional hub for experts working to tackle illegal and harmful content and share this work with policymakers, researchers and regulators.

Responsible innovation and deployment of AI requires balanced control mechanisms





GSEC Dublin anchors Google's European Trust & Safety capability

GSEC also offers multiple venues for external experts to share and discuss perspectives e.g. at the annual Growing up in the Digital Age Summit with +200 experts collaborating on how to protect, respect and empower kids and families online.

> *Dublin is a hub for our Trust and Safety teams in the region, comprising many different policy experts, specialists and engineers working to keep people safe online by using the latest technology and artificial intelligence.*
>
> **Ollie Irwin,**
> GSEC Lead, Google

Source: Implement Economics based on Google.

Google's Cloud technologies estimated to contribute more than €2bn to Irish GDP in 2025

Google Cloud contributes to Ireland's economy by helping firms and public institutions scale digital operations more efficiently, reduce technology constraints and access more flexible computing capacity. In practice, this helps organisations expand digital services when demand rises, process data faster and free up resources for innovation. Cloud also provides the digital foundation that supports broader AI adoption.

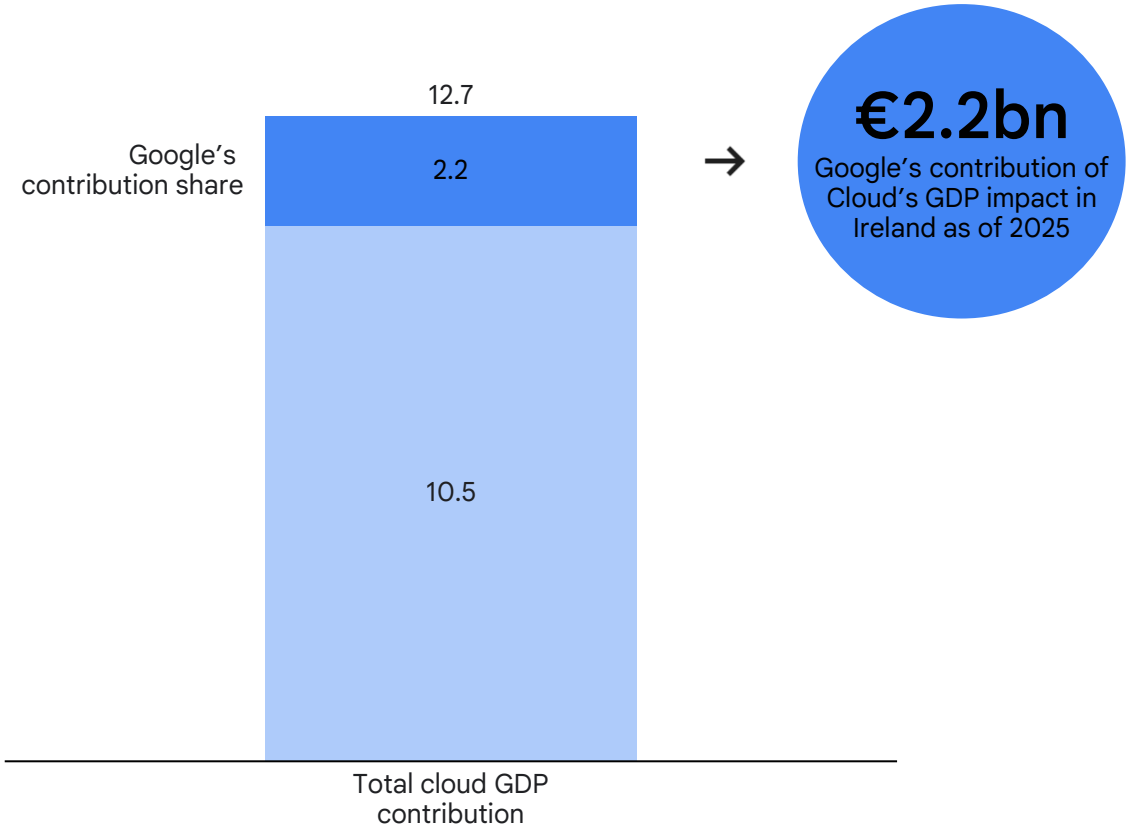
The estimate captures the current productivity contribution from cloud technologies in use today, based on observed cloud adoption and firm-level productivity relationships. As cloud adoption broadens, its role as a foundational enabler of digitalisation and innovation is expected to strengthen further.

→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google Cloud productivity boost

+2,150M EUR

Google's estimated GDP contribution from cloud in Ireland
EUR billion, 2025



Note: Cloud's GDP contribution is the measured impact of cloud technology on GDP through increased firm-level productivity.
Source: Implement Economics' based on Eurostat, OECD, and Statista Market Insights.

Google Workspace is a key piece of Google Cloud enabling businesses and citizens to organise, communicate, and collaborate digitally

Google Cloud helps businesses, developers and organisations to build, scale, collaborate and secure applications and data across time and place

Computing power
Runs website, apps and digital services in the cloud, allowing users to scale up and down when needed.

Data storage and analysis
Stores data and helps organisations turn it into insights with collaborative access across the organisation.

AI
Helps organisations build, use and integrate AI and access LLMs trained on big dedicated decentralised servers.

Security and compliance
Protects data, manages access and meets regulatory requirements.

Scalability and integration
Allows services to grow and connect easily with other systems.

Google Workspace is a key part of Google's cloud services…

Google Workspace

Google Workspace enables businesses and organisations to work more efficiently through cloud-based tools for collaboration, communication and everyday workflows.

It enables teams to work together in shared documents, folders and meetings, whether they are in the same office or working from different locations.

Workspace brings together cloud-based tools such as Gmail, Docs, Drive and Meet in one environment that users can safely access across devices.

With AI capabilities integrated into several applications, Workspace can help users draft content, organise information and work more efficiently.

+14
collaboration tools available through Google Workspace

Google Workspace includes:

Gmail, Drive, Meet, Calendar, Chat, Voice, Admin

Docs, Sheets, Slides, Sites, Forms, Keep, Editors

Source: Implement Economics based on Google Workspace.

→ Case

How Smyths Toys is using Google Cloud AI to master peak season and drive strategic growth

The challenge

Irish retailer Smyths Toys sees a massive revenue surge during the frantic peak Christmas season. This creates a critical customer service bottleneck, risking severe query backlogs and delayed response times that threaten high levels of customer satisfaction. To maintain service levels during this crucial sales period, the company was forced to double its team with temporary staff each year, a manual, costly, and time-consuming process

The solution

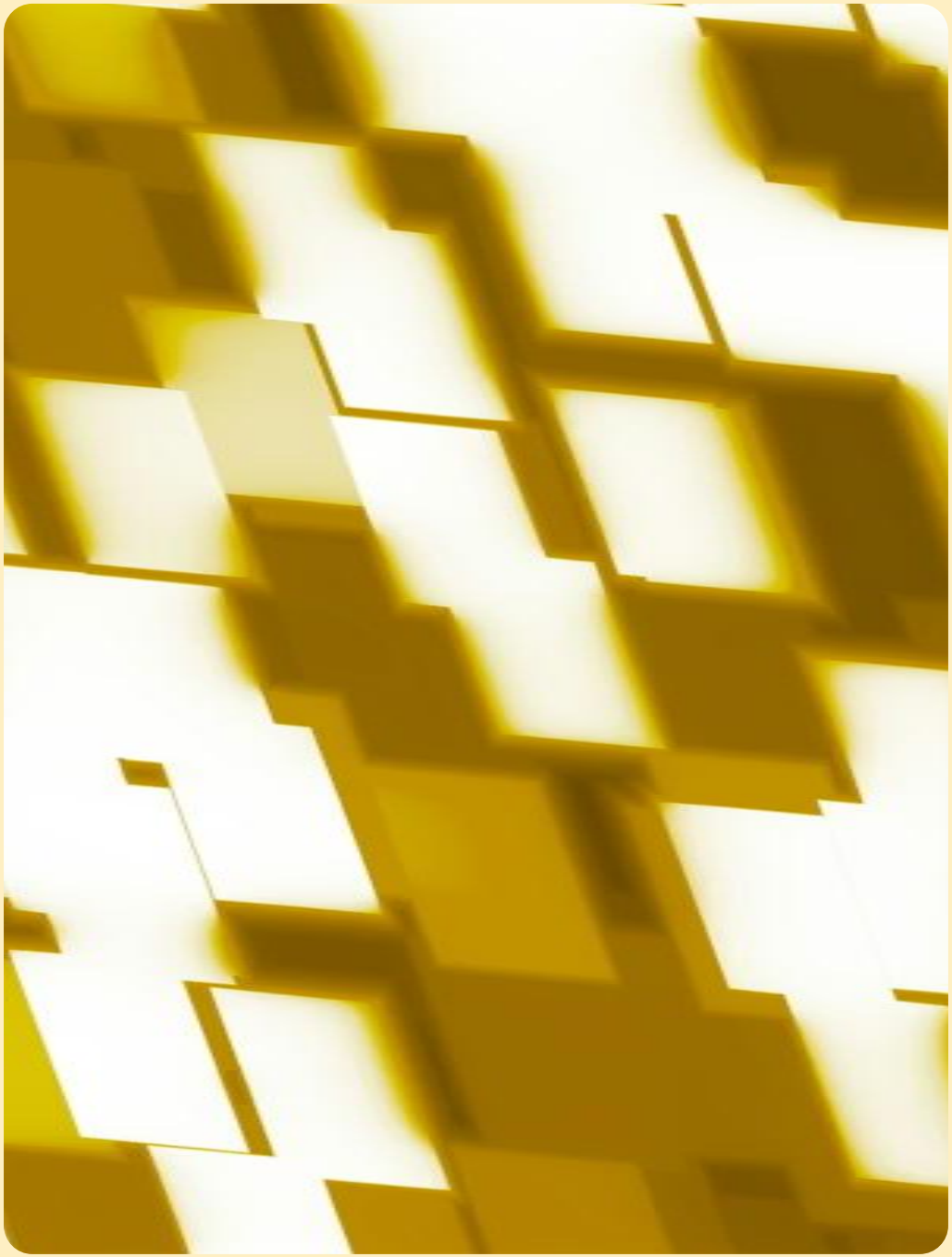
Smyths Toys developed "Codie," an AI digital assistant built on Google Cloud. Leveraging the Gemini Enterprise Agent Platform, Gemini 3.1 Pro, and the Google ABAP SDK, they created a powerful automation engine integrated with their core SAP systems. To ensure stability during massive traffic spikes, Smyths implemented a distributed core architecture, using Google Kubernetes Engine to auto-scale and handle complex queries without risking their main SAP system.

The impact

The results were transformative, turning the Codie AI assistant into a core member of the customer service team. Over 50% of website queries were addressed with an instant answer in less than 10 seconds, shattering the previous 48-hour SLA. Across both web and email, half of all customer service queries are now fully automated with AI agents. The AI assistant automatically resolved 90% of incoming emails, reducing the daily human workload from 1,000 queries to just 50, completely clearing a 5,000-email backlog to zero.

> *Google Cloud technology does help us scale. But Google's real value-add is not only its technology; it's the people we interact with and the support we get from Google Cloud. It feels more like a partnership*
>
> **Adam Sexton,**
> AI Development Manager, Smyths Toys

Source: Implement Economics based on Google



Part 3

Infrastructure & Offices

Driving Economic Impact through Office Operations, R&D and Local Infrastructure

> *We are committed to investing in building secure, resilient and future-proofed digital and AI infrastructure to grow and support Irish enterprise, to enhance quality of life in Ireland, to support Ireland as a location for investment and to enable world-leading RD&I in Ireland.*
>
> **Government of Ireland**
> In Digital Ireland – Connecting our People, Securing our Future

Google’s infrastructure and offices contributed €3.3bn to Irish GDP in 2025

In 2025, Google’s infrastructure and offices contribute 3,360M EUR to the Irish economy. This includes Google’s data centre, employees, and office operations, which create value through direct investment, local employment, supplier spending, and the wider economic activity supported by Google’s physical presence in Ireland.

Google’s contribution to Irish GDP from Infrastructure & Offices
EUR million, 2025

Offices

+2,230M

Infrastructure

+1,130M

Google supports more than 18,600 jobs in Ireland

Google Ireland supports a substantial employment footprint of 9,400+ jobs, comprising 6,000+ employees and 3,400+, temporary workers, vendors and contractors.

These activities ripple across the wider Irish economy. Google's Offices supported a further 6,370 jobs, while its Infrastructure supported another 2,860.

In total, Google supported more than 18,600 jobs across the Irish economy.

Google's contribution to employment in Ireland

Persons employed

Offices

8,550
Google employees and temporary contractors

6,370
Supported jobs

Infrastructure

850
Google employees and temporary contractors

2,860
Supported jobs

18,630
Total jobs supported in Ireland

Note: Total employment by Google Ireland is reported as per April-May 2026. The infrastructure related employment of 3,710 jobs is the average annual jobs during the period 2023-2025 based on Google (2026).

With 6,000 full-time employees, Ireland is Google's biggest and one of the fastest growing locations in the EU

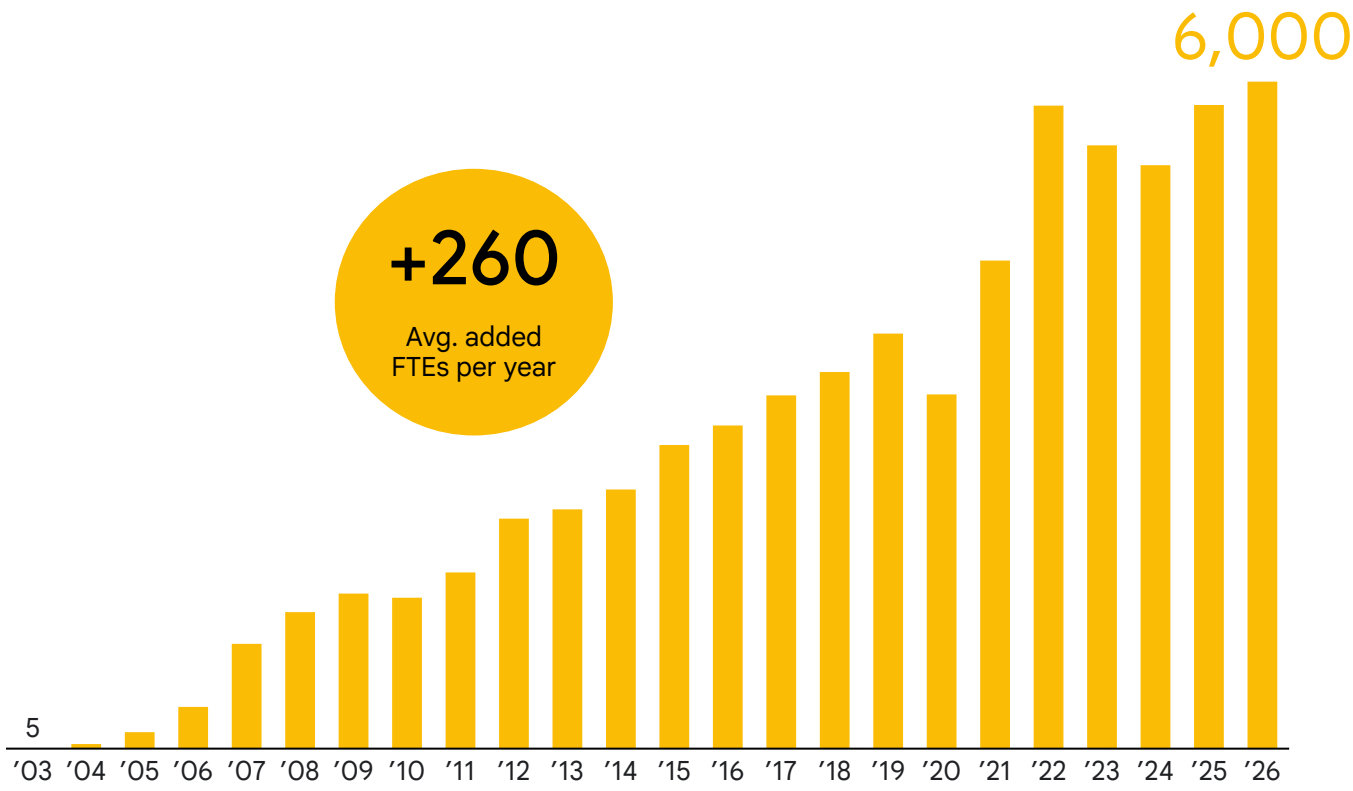
Since opening its first Irish office in Dublin in 2003, Google in Ireland has grown from 5 to 6,000 employees in 2026 across the 12 office buildings in the Google Dublin Campus and its data centres in Ireland.

The scale of employment in Ireland reflects that Dublin is Google's Europe, Middle East and Africa headquarters and base for European operations — the operational hub through which Google serves the EU single market and the wider EMEA region of over two billion people.

Over two decades, Ireland has also become more than Google's European operations headquarters. Dublin is now a hub for specialised talent with capabilities increasingly central to digital competitiveness.

> *Bolands Mills* (Google's restored 150-year-old Dublin Docklands site) *is now an innovation hub for 1,000+ engineers based at Google Ireland, working to keep global operations and AI models running 24/7*
>
> **Google, The Keyword**

Google Ireland employees since 2003
Persons (FTE)



Note: Annual observations use 1 January as timestamp, except 2026, which reflects total FTE employees for Google Ireland as of 24 April 2026.
Source: Implement Economics based on Google Ireland.

Google has an outsized footprint in Ireland with it being the home to Google's EMEA HQ

Ireland is home to Google's headquarters for Europe, the Middle East and Africa, making it a central hub for the company's operations.

Google's significant presence in Ireland contributes directly to the Irish economy through salaries paid to its employees and contractors. Google's non-salary expenditures also generate activity throughout the economy from all the local suppliers that help build, operate and maintain the offices. Finally, a third round of impacts occur when employees spend their wages in the economy.

Together, these effects contributed +2,230M EUR to the Irish GDP in 2025.

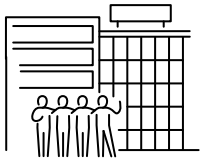
→ Find full methodology in the Annex

Contribution to Irish GDP in 2025 from Google's office operations and employment

+2,230M EUR

> *AI skills are not just for AI experts. Everyone will need some knowledge of AI and its implications. While AI developers and researchers will need expert-level skills, it is also the case that anyone working in an organisation that deploys AI systems will need to understand enough about AI and its implications to work effectively with those systems*
>
> **Former Minister for Skills and Further Education in Ireland, Niall Collins**

Google's offices contribution to the Irish economy



Direct contribution is Google's compensation paid to its workforce and spending on running its offices.

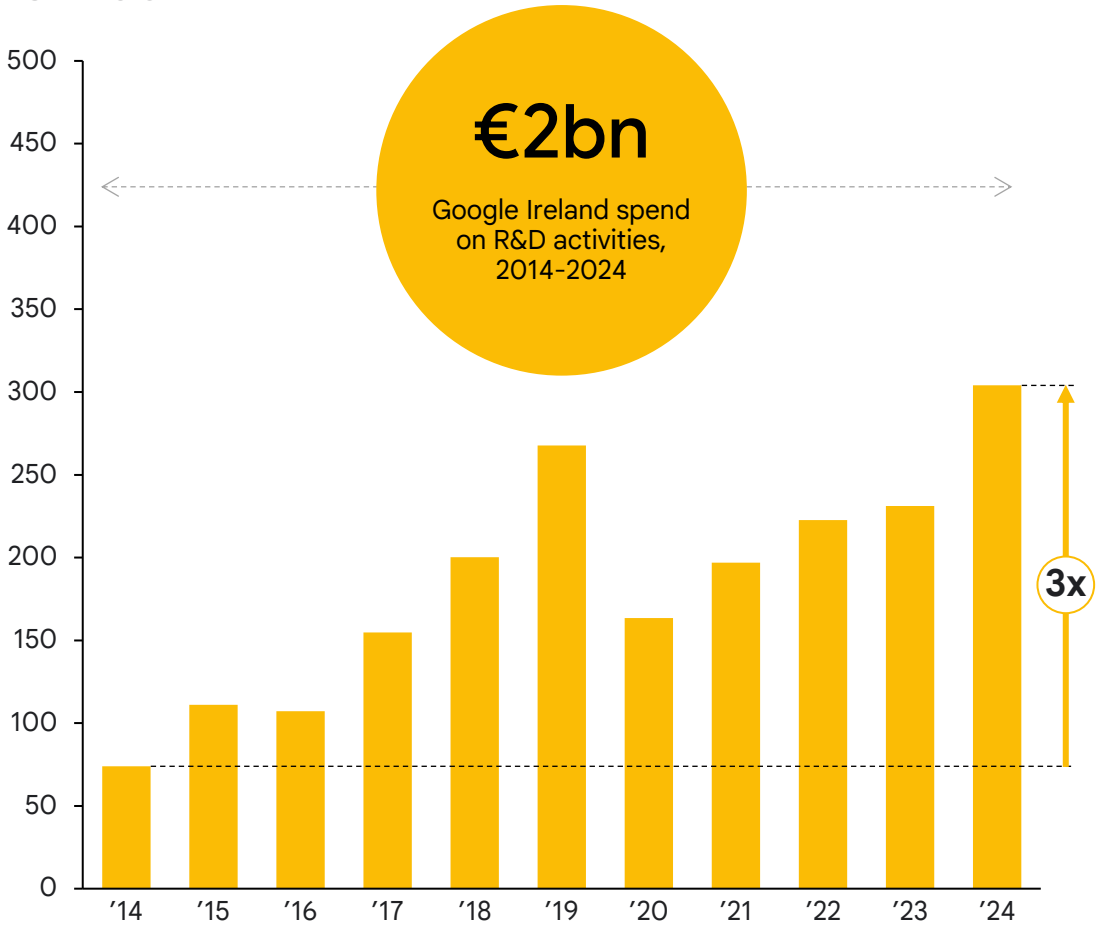
Indirect contribution is the supply chain activity generated from Google's office spending.

Induced contribution is the activity generated from Google's workforce and suppliers spending their wages in the everyday economy.

Note: The estimated impact excludes Google's recorded profits in Ireland (see annex for details).
Source: Implement Economics based on Google's financial accounts and Central Statistics Office.

Google Ireland has invested €2bn in R&D activities since 2014

Google Ireland's annual R&D spend, 2014-2024
EUR millions



Google Ireland R&D activities are a cornerstone of Google's commitment to building, launching, and deploying Google's frontier AI-systems on Irish grounds using local talent.

Google Ireland has over 850 employees working on R&D activities, a more than 150% increase over the last 10 years.

Since 2014, Google Ireland's R&D spending has been increasing from EUR 74 million to EUR 304 million in 2024, amounting to a total investment of EUR 2 billion.

This sustained investment matters not only for Google, but also for Ireland's wider economy. R&D is a key driver of productivity, innovation, and long-term economic growth.

By investing in R&D in Ireland, Google helps strengthen the local knowledge ecosystem by attracting talent, supporting collaboration, and building capabilities that can benefit the wider economy. This contributes to Ireland's position as a hub for advanced digital technologies and AI-driven innovation.

+850 employees

Google Ireland employees working with R&D activities in 2024

Source: Implement Economics based on Google Ireland.

Google's Irish data centre campus contributed €1bn to Ireland's GDP

Data centres provide the cloud and AI compute capacity that underpins modern digital society. This infrastructure enables businesses, public institutions, and citizens to use a wide range of digital and AI-enabled services, from data storage and enterprise software to advanced analytics and generative AI applications.

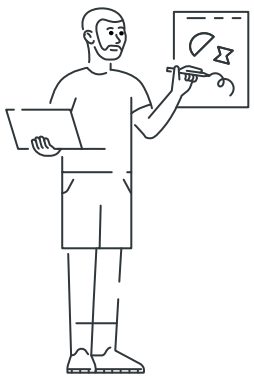
Ireland is one of Google's main data centre locations in Europe. Google's investment in the construction and operation of data centre infrastructure in Ireland generates economic impacts through direct capital expenditure and employment as well as indirect impacts via supply-chain activity and induced effects from household spending.

→ Find full methodology in the Annex

Annual contribution to Irish GDP in 2023-2025 from Google's data centre operations

+1,130M EUR

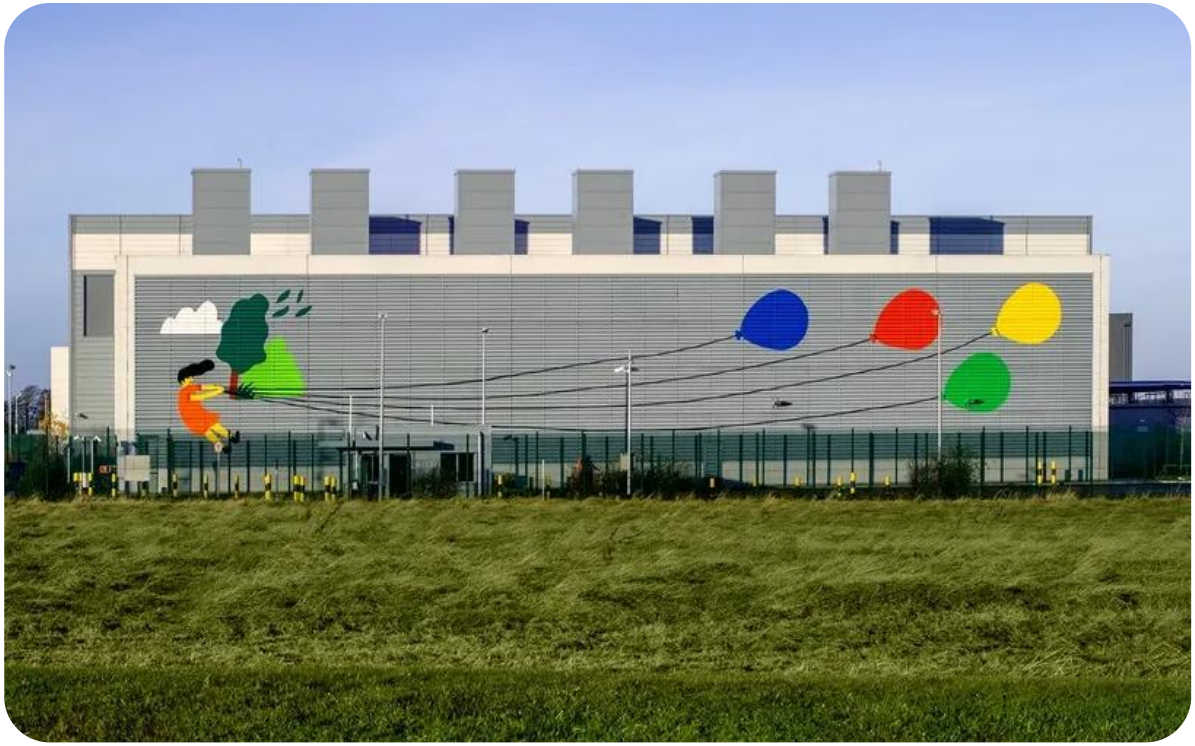
Data centres form the backbone of digitalisation with an Irish person connecting to several different data centres every day, including when they...



- Check the weather forecast in an app
- Plan their transport in an app
- Install new helpful applications on their phones
- Use email and attend virtual meetings
- Pay for goods online or using their phones in physical shops
- Consulting an AI-chatbot on ideas for interior design
- Collaborate in shared digital workspace
- Order groceries online
- Use social media or stream video online

Note: The estimated impact from data centres only include so-called upstream impacts from building and operating data centres in Ireland. The downstream impacts of using AI and cloud by businesses in Ireland is covered in section 2.
Source: Implement Economics based on Google (2026).

Google is partnering for renewable energy and battery capacity to increase its carbon-free energy performance



Since 2011, Google has invested in Ireland's digital infrastructure, fostering economic, environmental and social benefits for Irish society.

As part of Google's ambition to run on 24/7 carbon-free energy by 2030, Google signed an agreement with Power Capital Renewable Energy in 2023. This agreement has now resulted in 60 MW of solar capacity for Google in Ireland, which helped Google's Ireland operations achieve a 60% CFE in 2025. In addition, Google has partnered with Energy Dome on a 23 MW/200 MWh CO_2 battery plant in County Offaly, designed to absorb surplus renewable power and dispatch clean electricity when the grid needs it.

Since 2016, Google has invested over €1.6M in communities surrounding its data centre. Through grants and sponsorships this has directly empowered 39 unique local organizations including 20 distinct school-based grants.

Note: Google defines carbon-free energy (CFE) as any type of electricity generation that doesn't directly emit carbon dioxide, including (but not limited to) solar, wind, geothermal, hydropower, and nuclear. Sustainable biomass and carbon capture and storage (CCS) are special cases considered on a case-by-case basis but are often also considered carbon free energy sources. Google's CFE is influenced by various factors, such as overall electricity usage, purchases of carbon-free energy, technological advancements, and changes in the broader energy landscape.
Source: Implement Economics (2025) and Google (2026).

Part 4

Social impact

Building Local Digital Skills and Supporting the Irish Tech and NGO Landscape

Ireland's vibrant AI ecosystem, world-class talent and strategic infrastructure positions Ireland uniquely to lead these discussions and help shape the future of AI in Europe

Peter Burke TD
Minister for Enterprise, Tourism and Employment

+326,000 students and +273,000 individuals in Ireland have gained digital skills through Google-supported programmes

> *By widening access to AI, cybersecurity and other STEM disciplines, we are ensuring that the opportunities of the digital age are open to all, not just a few*
>
> **Micheál Martin, Taoiseach**
> at the Insight Scholarship Programme event

326,000 students

Helped across 1,700 schools since 2019, equivalent to more than 30% of Irish Primary and Secondary Schools

Google-supported programmes help young people build digital confidence, online safety awareness and digital citizenship. 'Be Internet Legends', for example, empowers younger children to use the web safely and wisely so they can be confident explorers of the online world

26,000 young people

Supported through classroom AI literacy and targeted scholarships for students from under-represented backgrounds

Programmes such as 'Experience AI' help over 950 post-primary educators and 12,000 students in Ireland with AI learning resources, while the 'Insight Scholarship Programme' provides 60+ undergraduate scholarships in AI, digital safety and STEM-related courses from 2024 to 2029

273,000 individuals

Trained in digital skills since 2016, helping Irish businesses build digital and AI capabilities

Programmes such as 'You're the Business', delivered with Enterprise Ireland and Local Enterprise Offices, provide free training and resources to help SMEs get online, grow online, expand internationally and adopt AI-powered solutions

Note: Additionally, +8,000 people in Ireland have been trained through a range of other programs (e.g. AI Works Roadshow, Google's JobCare programme). The full number of people trained by Google in Ireland totals +633,000.
Source: Implement Economics based on Google Ireland.

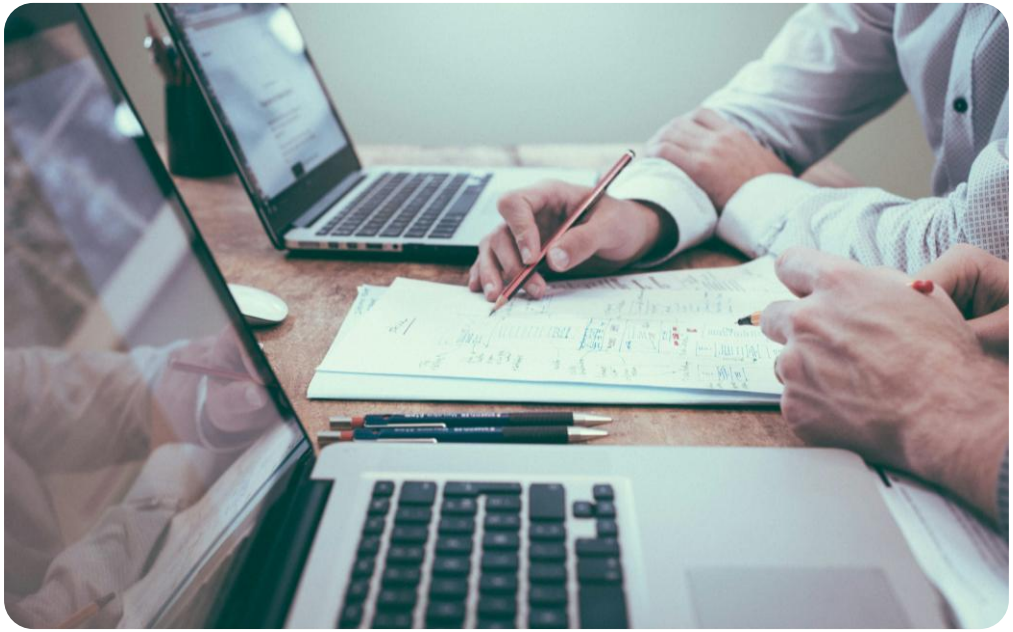
Google-backed programmes support people in Ireland across the digital skills lifecycle

Google's initiatives support people at different life stages — building digital confidence early, opening pathways for young people, and helping people move towards skills, jobs and participation in the Irish economy




Skills lifecycle	Early learning	Youth pathways	Career readiness	Economic participation
	Building digital and learning confidence early, starting with families and children	*Opening access to education, scholarships and early exposure to future career options*	*Helping people build practical skills, earn certificates and move towards high-quality employment*	*Supporting organisations that help people stay engaged and supported in their community*
Support examples	Google partners with '**A Lust for Life**', a Youth Mental Health Charity in Ireland, to embed online safety and empathy into youth wellbeing and sports clubs nationwide.	The local community initiative '**Education Taskforce**' supports transition year student placements, giving students from underserved schools early exposure to digital and workplace skills. **AI scholarship programmes** in partnership with Insight Research Ireland Centre support undergrad students from underrepresented communities.	Through the '**This City Works**' initiative, Google has supported **+1,000 Career Certificate Scholarships** and **+500 AI Essentials Certificates**, helping build job-relevant skills. Google and CeADAR have launched a **partnership to help Irish businesses address the AI skills gap** through e.g., tailored learning, access to Google AI solutions and €3 million in Cloud credits	The '**St Andrews Resource Centre**' has provided **career guidance** and wrap-around support to **+5,000 local people**, including +1,000 people with additional support needs. Google supports the **Irish Government's 'Harnessing Digital'** strategy by providing tools and expertise needed to reach the 75% digital adoption target for AI, Cloud, and Data

Note: Examples shown are illustrative and non-exhaustive, as local community programmes are selected to illustrate how Google-backed initiatives support people at different stages of the skills lifecycle, rather than to provide a comprehensive inventory of all activities.
Source: Implement Economics based on Google Ireland disclosures and programme reporting (2026).



→ Case

How the principal of an Irish school uses Google AI to reclaim time for his students

The challenge

Philip, a primary school principal at City Quay, wanted technology to free up time for what matters most: working directly with students and teachers. Administrative work, policies, lesson planning and meetings were taking time away from the human side of education.

The solution

After completing the Generative Artificial Intelligence (AI) for Educators course, Philip began using Google AI to support daily work. He uses it to summarise documents, create meeting minutes, prioritise tasks and develop differentiated lesson plans, including adapting content for students with dyslexia.

The impact

Using AI has given Philip more time for face-to-face work with students and teachers. It supports lesson planning and curriculum delivery, helping tailor content to different needs, while making it easier to manage day-to-day demands and focus on the children at the centre of school life.

> *The direct result of using AI is more free time to be face-to-face with our students and teachers. It is an incredible tool that allows so much scope for integration into education.*
>
> **Philip Kelly,**
> Principal at City Quay

Source: Implement Economics based on Google.

€133M in contributions from Google in Ireland through philanthropy, non-profit support and employee giving

Google Ireland's social contribution combines tools, funding and employee giving — helping non-profits expand their reach, improve operations and deliver impact in Irish communities:

1. **Digital support for non-profits:** Through the Google for non-profits programme, Google has provided EUR 81 million in value to Irish organisations, primarily via Ad Grants and Workspace tools, helping non-profits increase reach and improve operational efficiency at scale.

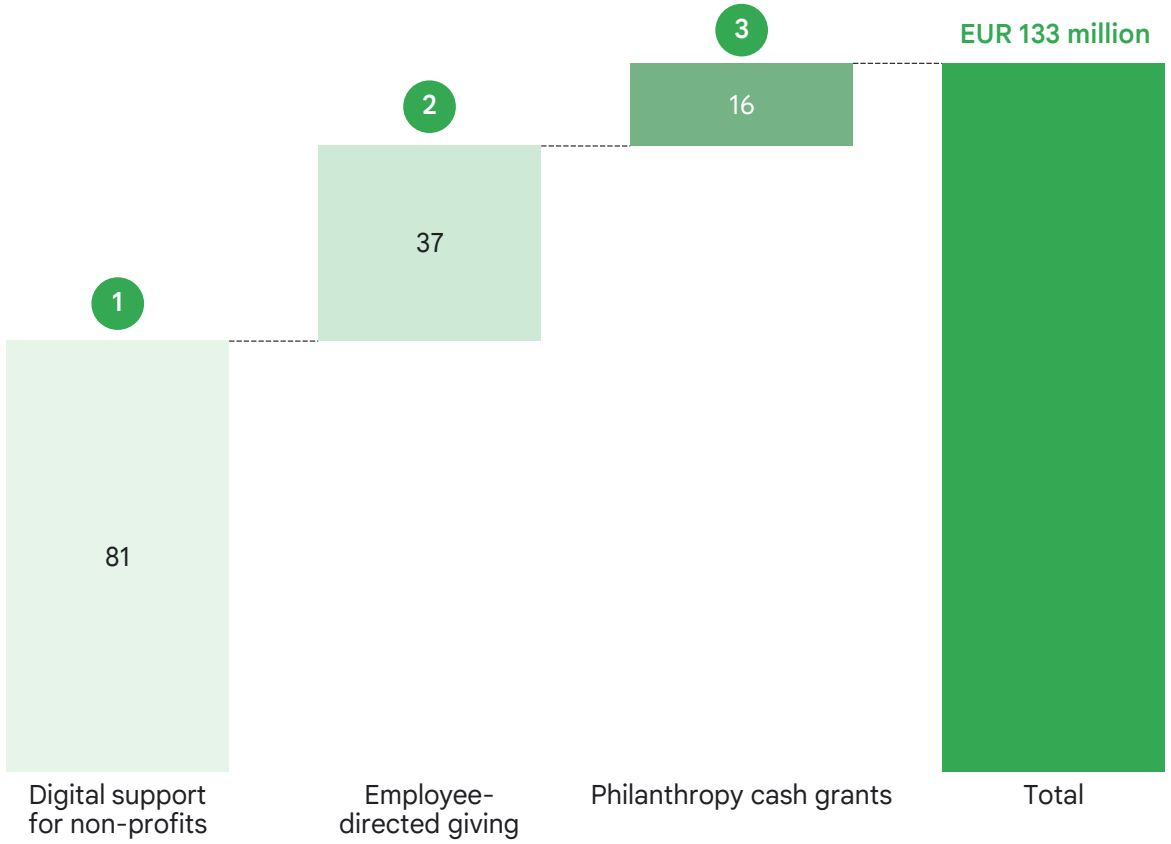
2. **Employee-directed giving:** Google Ireland's workforce has driven nearly EUR 37 million in community support, including personal donations, Google matching funds and annual Holiday Giving campaigns.

3. **Philanthropy cash grants:** Google Ireland has disbursed over EUR 16 million in direct philanthropy cash grants to support high-impact community projects, social innovation and inclusion initiatives across Ireland.

+226,000

Volunteering hours dedicated by Googlers in Ireland to support local community efforts

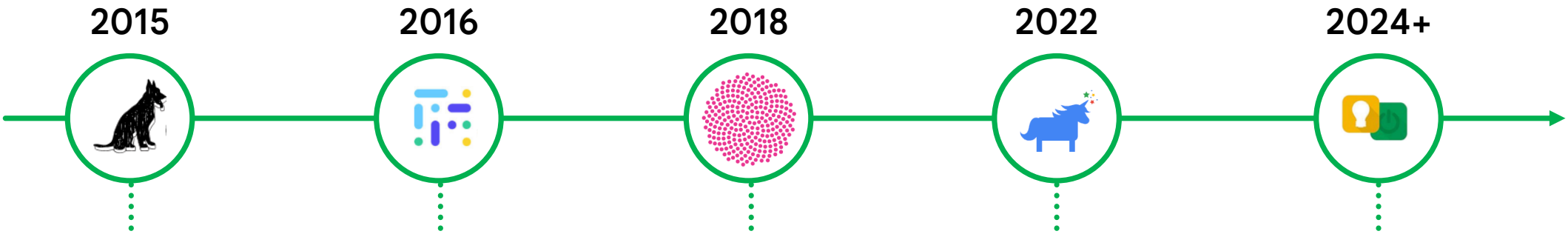
Google Ireland social contributions
EUR million



Note: Figures represent Google Ireland's total direct financial contributions since establishment, including direct philanthropy cash grants, non-cash support to non-profits (e.g. Ad Grants and Workspace tools), and employee-directed giving. Volunteering hours are reported separately and are not included in the financial totals.
USD amounts are converted to EUR using an average EUR/USD exchange rate of 1.17.
Source: Implement Economics based on Google.

Google has helped strengthen Ireland's startup landscape for over a decade

Through hub partnerships, mentoring platforms, sponsorship, data and startup advocacy, Google has supported organisations that help founders in Ireland connect, scale and be heard



2015

Google connects Dogpatch Labs to its global startup network

Dogpatch Labs supports Dublin founders through workspace, community and programmes. Google connected the hub to Google for Startups, giving Irish startups access to resources, mentoring and global hub connections.

2016

Google powers First Fridays as a founder mentoring platform

First Fridays gives founders recurring access to mentoring, talks and networking. Powered by Google for Entrepreneurs, it had reached 170 startups and 10,000 minutes of mentoring by its first year.

2018

Google supports startup visibility and policy voice

ScaleIreland is Ireland's leading representative organisation for Irish tech startups and scaling companies. Google has supported Scale Ireland from the start and remains a strong supporter today through sponsorship, partnership, data and advocacy.

2022

Google launches 'Scale Up' mentoring programme

'Scale Up' targets later-stage startups with mentoring sessions on UX, data & analytics, Sales & Marketing, Hiring and Product, partnering first with Enterprise Ireland in 2022, and Endeavor since 2024+

2024+

Google relaunches 'Adopt A Start-Up' for early-stage founders

Adopt A Start-Up is Google's mentoring programme for early-stage startups, focused on practical support, networking and growth readiness. In 2024, the programme was relaunched to focus on 10 high-potential Irish-based startups.

Source: Implement Economics based on Silicon Republic, ScaleIreland and Irish Tech News.

→ Case

How Hexis, Irish Startup of the Year ‘25, is using Google Cloud AI to fuel elite athletes

The challenge

Dublin-based health-tech startup Hexis created an advanced nutrition intelligence platform to optimise athlete performance. However, to expand rapidly into the UK and US markets, the company faced a technical barrier: its software needed to ingest, sync, and calculate vast amounts of real-time wearable data simultaneously. Without a highly scalable infrastructure, Hexis risked slow feature deployment and manual backend bottlenecks that would limit growth.

The solution

Hexis overcame these scaling limitations by joining the **Google for Startups Program**, and utilising Google Cloud to consolidate its infrastructure. Google Cloud provided the robust data, compute and AI needed to seamlessly integrate real-time streams from platforms like WHOOP and Garmin. With Google Cloud handling the complex data processing, Hexis deployed advanced AI features that instantly translate complex metrics into actionable, natural-language nutrition insights direct to athletes.

The impact

These technological gains allowed the 2025 National Startup Awards Grand Prix winner to expand at speed in new markets. Delivering a **7x increase in speed-to-market,** Hexis designed, built, and launched its research-grade "Nutrients" feature in just 3 days instead of the typical 21 to 30. This agility has helped Hexis to successfully establish themselves as a critical global sports brand, **now trusted by 40% of the Tour de France peloton and 50% of the Premier League** heading into the 2026/27 season.

Source: Implement Economics based on Silicon Republic and Google Ireland.

Annex

Methodology for modelling the economic impact of Google in Ireland

Methodology for Products & Platforms

User impact

The GDP contribution from Google's products and platforms with a user impact is estimated based on the time saving of using the product scaled by the number of work-related users.[1]

The resulting time saving is converted to GDP using labour cost per hour worked.

Google Search

- The time saving is based on Varian (2011), which estimates that using Google saves 15 minutes per question, with the average person asking 1 answerable question every 2 days.
- The number of work-related users is estimated as the share of total employment using digital services for more than half of their working time, the adoption rate for search engines for these workers and the market share of Google Search.

Google Maps

- The time saving is based on Arora et al. (2021), which estimates that Google Maps saves 6.5% of travel time on average.
- The number of work-related users is estimated for dedicated drivers and for business-related travel separately.

Google Chrome

- The time saving is based on Forrester (2018) which estimates the annual benefit per knowledge worker using Google Chrome.
- The number of work-related users is estimated as the share of total employment using digital services for more than half of their working time, the adoption rate of browsers for these workers and the market share of Google Chrome.

Ecosystem impact

The GDP contribution from Google's products and platforms with an ecosystem impact is estimated from the revenue generated for developers, publishers and creators through the ecosystem enabled by the product.

The resulting revenue is converted to GDP using GVA-output and GDP-GVA ratios.

Android and Play

- Revenue generated for mobile app developers through Android is estimated by updating the revenue streams reported in (2022) to 2025 levels. The resulting ecosystem revenue is adjusted to Ireland by its share of app developers in the EU.

AdSense

- Revenue generated for Google Network partners through AdSense is estimated by scaling Google's global network revenue in 2025 by the share of traffic acquisition cost and the share of those payments to website owners. The resulting ecosystem revenue is adjusted to Ireland by its share of global display spend.

Advertiser impact

The GDP contribution from advertisers is estimated from the economic value that advertisers have from paid and organic Search and Ads traffic.

The resulting advertiser value is adjusted to reflect gross value added (GVA) using national accounts.

Search and Ads

Following the precedent of past Google impact reports, Implement used third-party data to estimate the spend on Google ads combining data on the total paid search market and estimates of Google's market share.

The economic value for advertisers of Search and Ads is estimated based on three assumptions:

- Following the methodology in Varian (2009), Google's Economics Team estimates that businesses make, on average, at least €2 for every €1 they spend on paid ads.
- Google's Economics Team estimates that businesses paying for Google ads receive an additional five organic clicks for every one click on their ads.
- Google's Economics Team estimates that organic search clicks are 70% as valuable as ad clicks to advertisers.

Based on these estimates, the economic value for advertisers is: 2 * spend + 70% * 5 * 2 * spend – spend = 8 * spend.

Note: 1) Work-related users are defined as share of the employment relevant for a Google platform times the adoption rate of the technology times Google's market share.
Source: Implement Economics based on Eurostat, Varian (2011), Arora et al. (2021), Forrester (2018), (2022), PPI (2022), Statcounter (2025), Business of Apps (2026), Alphabet Inc. (2025), IAB (2025), Varian (2009), and Google's Economics Team

Methodology for AI & Cloud

Data sources applied in the estimation of Google's AI & Cloud contribution

The study relies on three data sources to estimate the impact of AI and Cloud:

- **Published research from OECD and EIB.** For Cloud, the study applies the OECD (2019) firm-level productivity estimate linking MFP growth to industry-level cloud adoption. For AI, the study applies the EIB (2026) estimate of AI adoption on firm-level labour productivity.
- **Eurostat GVA and technology adoption data at NACE Rev. 2 industry level 1 aggregation, as well as EIB data on country-level adoption of big data and AI technologies across industries.** The data gives industry-level measures of the share of enterprises using AI technologies and paid cloud computing services, which are used as industry-level indicators of AI and Cloud adoption. In addition, the study uses country- and industry-level value added data from Eurostat to convert productivity gains to economic impact, taking only GVA for firms with more than 10 employees.

Productivity effects from adoption of Cloud

OECD research uses industry-level cloud adoption rates to estimate firm-level productivity effects and finds a positive and statistically significant impact of cloud adoption on firm-level MFP. To measure the impact of cloud adoption on firm-level MFP, OECD's econometric model controls for:

- **Innovation spillovers |** MFP growth of the productivity frontier is included to control for industry differences in frontier productivity.
- **Convergence |** Lagged distance to the frontier is included to control for firms below the frontier benefitting from catching up.
- **Firm characteristics |** Firm size and age are included to account for differences in firm-level productivity.
- **Fixed effects |** Industry and country-year fixed effects are included to account for unobserved common productivity drivers.

Productivity effects from adoption of AI

EIB research shows that AI adoption increases firm-level labour productivity in Europe. Using matched EIBIS-ORBIS data from 2019-2024 on more than 12,000 firms in the EU and US, the study instruments AI adoption in European firms using comparable US peers and finds that AI adoption increases labour productivity by 4% on average. To estimate the impact of AI adoption on firm-level labour productivity, EIB's econometric model controls for:

- **Firm characteristics |** Size and age fixed effects are included to account for differences in firm-level productivity and adoption propensity.
- **Firm-level controls |** Investment, profitability, financial leverage and total assets are included to moderate simultaneity effects.
- **Fixed effects |** Country-sector-wave fixed effects are included to absorb common shocks in AI adoption and productivity.[1]

Google's contribution to productivity growth

To estimate Google's contribution to productivity growth, the study takes the following approach:

- **AI and Cloud are estimated separately** to provide a transparent split of the productivity contribution from each technology.
- **For AI,** we apply EIB's estimated AI productivity uplift to the corresponding adoption rates as measured by EIB. We also replicate the estimate using Eurostat's AI adoption figures and report the lower of the two to maintain a conservative approach. The resulting productivity uplift is multiplied by industry-level GVA and then by Google's estimated AI market share.
- **For Cloud,** the study applies the OECD-based cloud productivity parameter using a conservative non-cumulative interpretation. The cloud productivity uplift is calculated based on the increase in industry-level cloud adoption rates over the past 10 years multiplied by industry-level GVA and then by Google's estimated cloud market share.
- Where country-industry adoption figures are unavailable or marked as unreliable, the study uses the EU-wide industry averages as a proxy. When adoption data is lacking for a specific year, we use the closest reported year.

1. Country-sector-wave fixed effects mean the model compares firms within the same country, sector, and survey wave/time period, so any productivity or adoption differences common to that country-sector-time cell are absorbed rather than attributed to AI.
Source: Implement Economics based on Eurostat, OECD (2019), EIB (2026) and Synergy Research Group and IoT Analytics

Methodology for Infrastructure & Offices

Economic impact of employees and offices

The GDP contribution from Google Ireland's employees, temporary workers, vendors, contractors and office operations is estimated using input-output modelling based on Irish input-output tables from the Central Statistics Office.

The GDP contribution from Google Ireland's employees and office operations (excl. data centre-related expenditure) is estimated using input-output modelling, based on employee compensation and office-related expenditure. Staff cost data is sourced from Google Ireland's Annual Report and adjusted to reflect 2025 economic conditions, then applied to the number of employees to estimate the 2025 GDP contribution.

Employee compensation is treated as a direct GVA contribution with additional induced effects (captures effect of household spending supported by employees, temporary workers, vendors and contractors of Google).

Office-related expenditure is modelled as a demand shock across relevant Irish supplier sectors. The direct effects capture Google's office-related expenditure. Indirect effects capture the activity supported among Google's suppliers and their own supply chains. Induced effects capture the household spending supported by employees of suppliers.

The resulting revenue is converted to GDP using GVA-output and GDP-GVA ratios.

Supported jobs from Google Ireland's office operations is estimated using input-output modelling based on Irish input-output tables from OECD.

The modelling is based on Google's number of employees and temporary workers, vendors and contractors (excl. data centre employment), which is treated as direct employment. Data is from Google Ireland's financial accounts, with total employment reported as per April-May 2026, the newest available data at time of analysis.

Based on these data and input-output employment multipliers, the indirect and induced jobs are estimated. The indirect jobs are those supported among Google's office suppliers and their own suppliers, while the induced jobs are those supported by employees and suppliers' household spending in the local economy.

Economic impact of data centres

The GDP contribution from Google Ireland's data centre is based on Google (2026), which estimates the economic impact of Google's data centre operations and value chain using an input-output model developed by IMPLAN.

The estimate includes direct, indirect and induced effects. Direct effects include Google employees and contractors, their payroll and benefits, and Google's annual spend on suppliers. Indirect effects capture the activity supported among Google's suppliers and their own supply chains. Induced effects capture the household spending supported by employees of Google and its suppliers.

Supported jobs from Google Ireland's data centre are also based on Google (2026), which estimates the jobs supported by Google's data centre operations and value chain using the IMPLAN input-output model.

The direct jobs are those working directly at the data centre, the indirect jobs are those supported among Google's data centre suppliers and their own suppliers, and the induced jobs are those supported by employees and suppliers' household spending in the local economy.

Source: Implement Economics based on Central Statistics Office, Google, Eurostat, OECD and Google (2026)

GNI versus GDP contribution estimates for Google's economic contribution to Ireland

This report estimates Google's contribution to the Irish economy using two key measures:

- **Gross Domestic Product (GDP)** which measures the total value of all goods and services produced within Ireland's borders. It includes the profits of foreign-owned multinationals operating in the country.
- **Gross National Income (GNI)** which measures the total income earned by Irish residents and businesses, regardless of where that production takes place.

For both measures we have excluded Google's recorded profits in Ireland. For GNI specifically, we apply the Central Statistics Office's metric *Modified Gross National Income (GNI*)*.

Google's estimated economic contribution to Ireland
EUR billion, 2025

Dimension	GDP contribution (EUR m)	Modified GNI contribution (EUR m)	Adjustment from GDP to modified GNI
Products & Platforms	**4,175**	**3,200**	
Search and Ads	3,485	2,670	Advertiser value adjusted by GNI/GDP ratio No adjustment of user impacts as time savings uses labour cost.
Android & Play	370	210	Adjusted by GNI/GDP ratio
Chrome	195	195	No adjustment since productivity gain is valued using labour cost
Maps	125	125	No adjustment since time savings is valued using labour cost
AI & Cloud	**3,045**	**1,735**	
AI productivity	895	505	Adjusted by GNI/GDP ratio
Cloud productivity	2,150	1,230	Adjusted by GNI/GDP ratio
Infrastructure & Offices	**3,360**	**2,625**	
Data centre	1,130	645	Adjusted by GNI/GDP ratio
Employees & offices	2,230	1,980	No adjustment of employee compensation Non-salary office expenses adjusted by GNI/GDP ratio.
Total Economic Contribution	**10,580**	**7,560**	

Note: Adjusted by the 2024 GNI/GDP ratio, as 2024 is the latest year with available GNI data.
Source: Implement Economics based on Central Statistics Office

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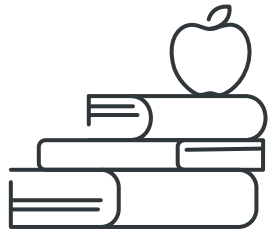

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About this report

This report has been developed by Implement Economics, the Economics Practice of Implement Consulting Group, in partnership with Google.

This report includes the authors' assessments of Google's contributions to the Irish economy. Google offers leading cloud and AI technologies and is among the pioneers in the recent AI breakthrough. By combining products, expertise and models, Google provides tools and infrastructure that support business productivity and facilitate a seamless marketplace by connecting users, advertisers and the ecosystem of creators.

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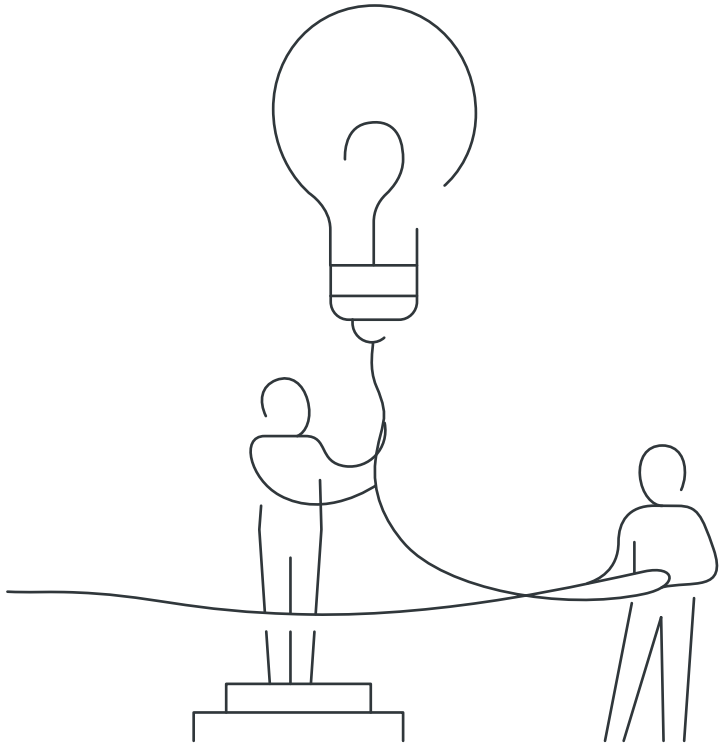

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