

Employment in large-scale multinational enterprise groups

Statistics Explained

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EXPERIMENTAL

Highlights

"In 2023, almost 34 million people were working in large-scale multinational enterprise groups operating in the EU-EFTA territory, according to the EuroGroups Register."

Figure 1 This article gives an overview of the employment and control of the large-scale multinational enterprise groups operating in the EU and European Free Trade Association (EFTA) countries (EU-EFTA) in 2023, according to the data available in the European statistical register on multinational enterprise groups (EuroGroups Register (EGR)). A large-scale multinational enterprise group is a multinational enterprise group employing at least 1 000 people in EU and EFTA countries and having at least 150 people employed in at least two EU and EFTA countries.¹

In 2023, according to the EGR

- Almost 34 million people were working in large-scale multinational enterprise groups operating in EU and EFTA countries; these represent an increase of around 2 million people with respect to the previous year. From the total workforce of multinational enterprise groups operating in the EU-EFTA territory, more than 2 out of 3 of them were working in a large-scale one.²
- The vast majority of the people employed in large-scale multinational enterprise groups were working in a group controlled by an EU or EFTA country
- Almost half of these groups were active mainly in the manufacturing sector, with a large concentration (34%) of the people employed in large-scale MNE groups

Check the [structure of multinational enterprise groups in the EU](#) for more information about the entire population of multinational groups in the EU and EFTA countries according to the EGR.

Employment in large-scale multinational enterprise groups operating in the EU and EFTA countries

The source used in this article is the EGR, the European statistical business register for multinational enterprise groups. A multinational enterprise group is an enterprise group that operates in at least two countries, with one of

¹The definition of a large-scale multinational enterprise group is as described in Article 2 of Directive 2009/38/EC.

²Without the second condition to have more than 150 people employed in at least two EU and EFTA countries, the number of MNE groups with at least 1 000 employees was around 5 500 and employed about 41 million people in the EU-EFTA territory in 2023

these being in the EU or EFTA. Among them, large-scale multinational enterprise groups are the groups employing at least 1 000 people in the EU and EFTA countries and having at least 150 people employed in each of two of these countries. These groups are important for those Directorates General of the European Commission having responsibilities on the implementation of policy in the employment area.

In 2023, according to the EGR:

- Among the 49 million people working in a multinational enterprise group in EU and EFTA countries, 34 million of them were working in a large-scale multinational enterprise group. This represents an increase of around 2 million people with respect to the previous year.
- Around 4 000 (almost 100 more than the previous year) large-scale multinational groups were present in the EU and EFTA countries, accounting for 2% of the multinational enterprise groups operating in EU-EFTA.

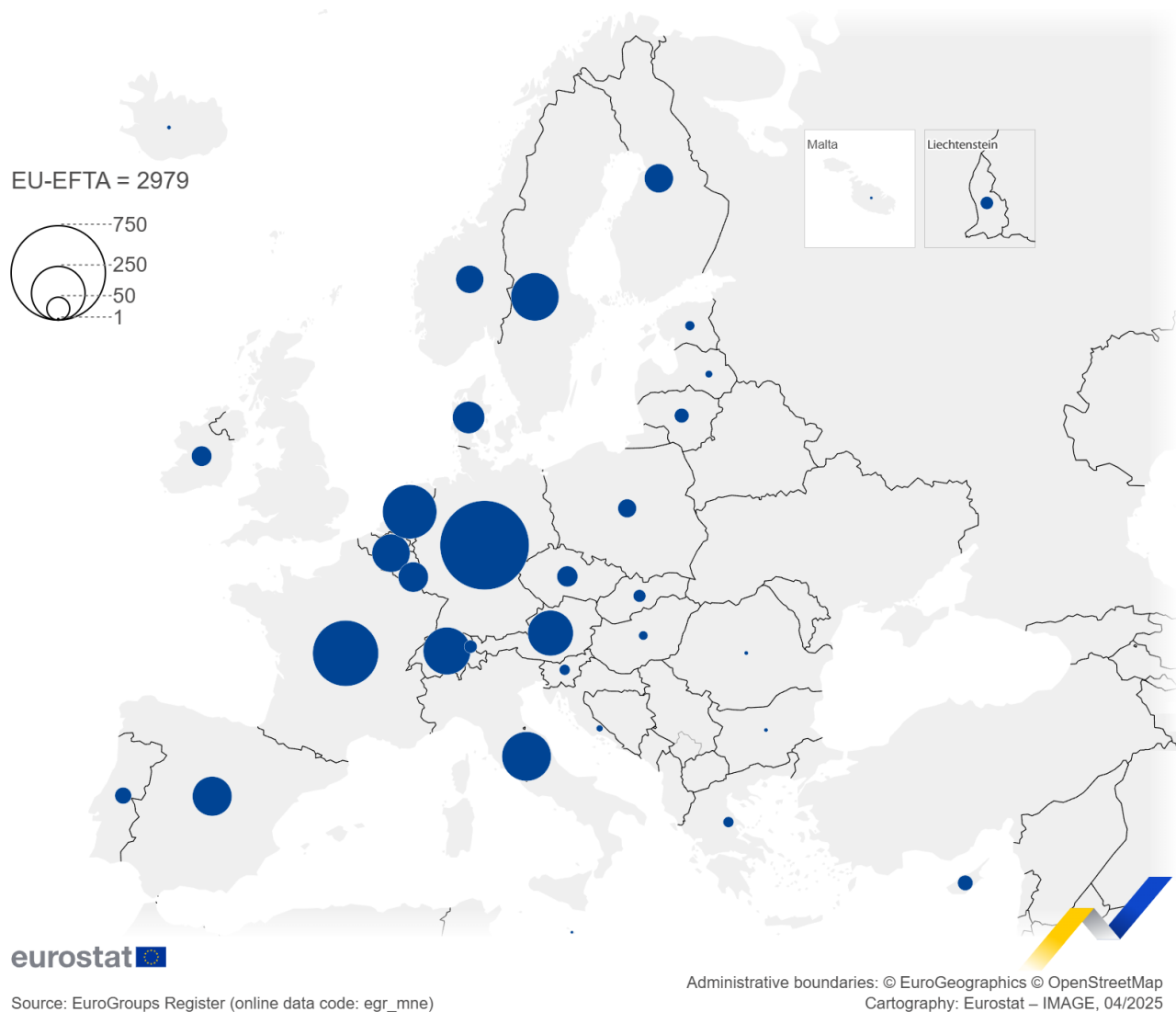
Which countries control the large-scale multinational enterprise groups that operate in the EU and EFTA countries?

Most of the large-scale multinational enterprise groups that operate in the EU and EFTA countries are controlled from a country within the EU-EFTA territory (3 out of 4):

Figure 2 Since 2018, the number of large-scale multinational enterprise groups have been steadily increasing. Since 2018, an increase of more than 15%; while in the last year alone, the number of large-scale multinational enterprise groups increased by more than 2%. Together with the fact that employment in the EU-EFTA territory in these groups increased, in the last year alone, more than 5%, depicts that not only more large-scale multinational enterprise groups are present in the EU-EFTA territory, but also, they are getting larger in terms of employment.

When looking at the distribution of groups between the EU-EFTA countries, it is rather stable, and some countries control most of these large-scale multinational enterprise groups. For instance, in 2023, the distribution looked like this:

Large-scale MNE groups operating in EU-EFTA by controlling country 2023



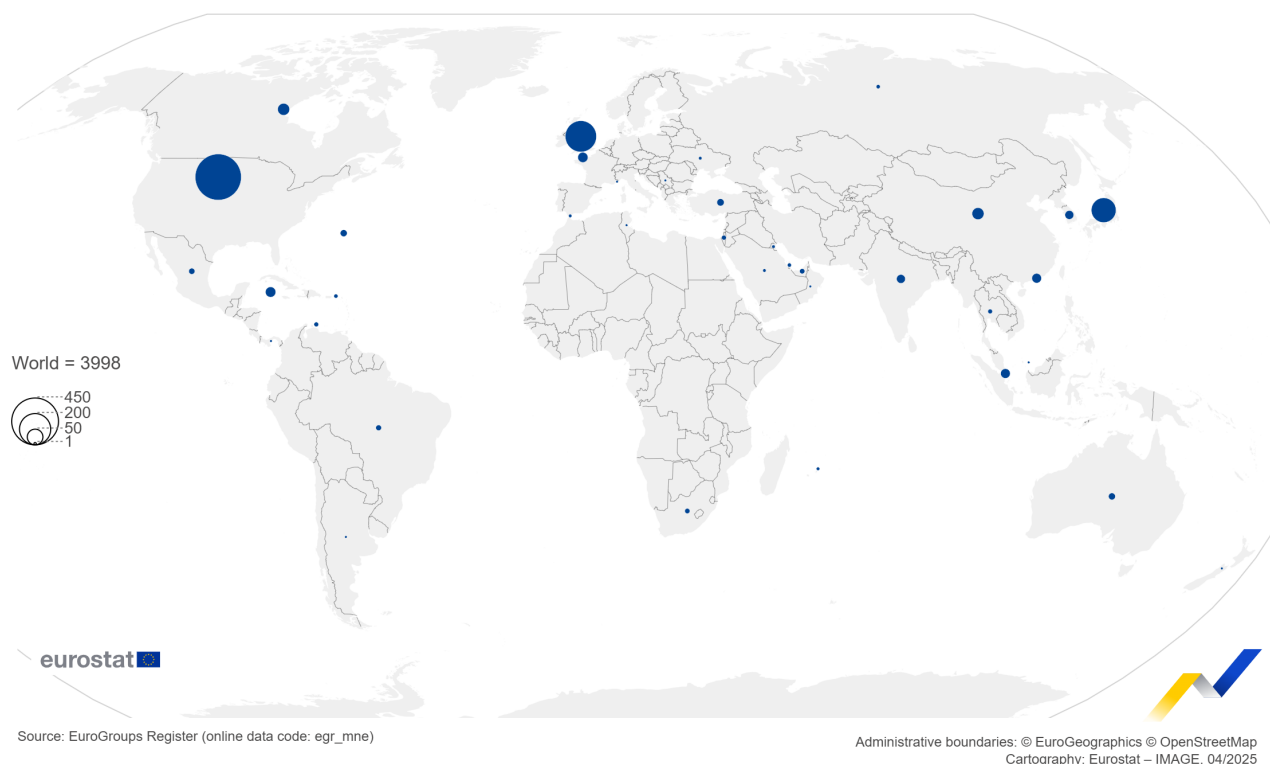
Map 1: Large-scale MNE groups operating in EU-EFTA by controlling country, 2023 Source: EuroGroups Register (egr_mne)

Within the EU territory, most groups are controlled by Germany, with more than 650 of them; followed by France, the Netherlands and Italy, controlling more than 200 groups each. In the EFTA territory, the country controlling the most groups is Switzerland, with almost 200 groups. There are also some small countries which control a large number of groups given their size, this is the case, for example, of Luxembourg, controlling more than 80 of these groups, even though the country represents only 0.1% of the [EU's population](#).

From outside the EU-EFTA territory, the countries controlling the most large-scale multinational enterprise groups operating in the EU-EFTA economy are the United States and the United Kingdom, followed by Japan:

Large-scale MNE groups operating in EU-EFTA by controlling country

2023



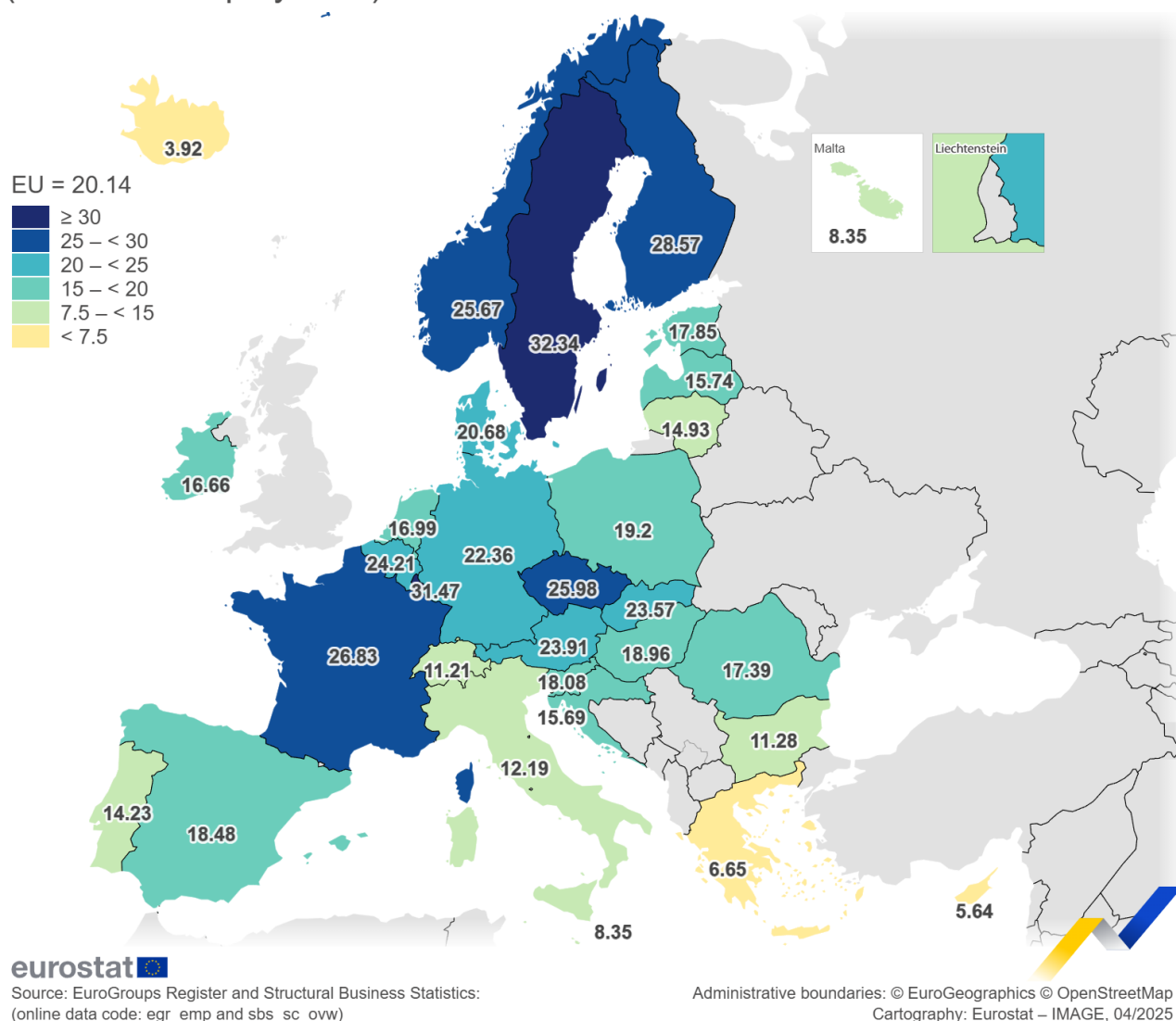
Map 2: Large-scale MNE groups operating in EU-EFTA by controlling country, 2023 Source: EuroGroups Register (egr_mne)

How much large-scale multinational enterprise groups impact the national employment?

Workers of large-scale multinational enterprise groups are spread across the different EU and EFTA countries. According to [structural business statistics \(SBS\)](#), around 168 million people were working in the EU-EFTA territory; out of those, more than 20% (almost 34 million) of them worked in a large-scale multinational enterprise group.

However, the distribution of these workers was very heterogeneous across the different countries:

Percentage of people employed by large-scale MNE groups, 2023 (% of total employment)



Map 3: Percentage of people employed by large-scale multinational enterprise groups, 2023 Source: EuroGroups Register (egr_emp) and (sbs_sc_ovw)

In Cyprus, Greece and Iceland the impact of large-scale multinational enterprise groups in the national employment was limited, with less than 7.5% of the workforce being employed at a large-scale multinational enterprise group. On the contrary, in other countries, such as Luxembourg or Sweden more than 30% of the workforce was being employed by at a large-scale multinational enterprise group.

In which sectors do large-scale multinational enterprise groups operate?

In 2023, the EGR large-scale multinational enterprise groups operating in the EU and EFTA countries carried out a variety of economic activities, covering almost 20 NACE sections and around 80 NACE divisions. These groups were mainly active in the manufacturing sector, covering more than 46% of them. However, in terms of employment, although the manufacturing sector is still the most prevalent, it accounts for a lower share, with 34% of the

employment (about 11 million people) in large-scale multinational enterprise groups. This indicates that groups operating mainly in the manufacturing sector tend to be smaller in terms of employment when compared to other sector groups active in other sectors, like it can be, for instance, the financial or insurance services:

Figure 3

Feedback

To help Eurostat improve these experimental statistics, users and researchers are kindly invited to give us their [feedback by email](#)

Data sources

The EGR database is the source of the above-mentioned large-scale MNE groups data. The EGR is the statistical business register of the EU Member States and EFTA countries for MNE groups. It produces data in yearly cycles and covers microdata on the groups and their enterprises and legal units.

The EGR aims to register all MNE groups that have enterprises in EU Member States or EFTA countries, including European and non-European groups. The EGR does not cover all-resident enterprise groups – those with enterprises only in one country, and independent enterprises.

The EGR microdata help explore the structure and impact of MNE groups in Europe. We can analyse group size, complexity, and employment patterns in European countries, together with their European influence.

The EGR makes it possible to present results from two sides: from the MNE group perspective, based on the country of control of the group, and from the national perspective of the country in which the group is located, irrespective of where the control unit is located.

The EGR is a statistical business register that serves statistical purposes only. Access to EGR data is restricted to national statistical institutes and national central banks that produce official statistics in the EU Member States and EFTA countries.

Context

Globalisation and the increasing complexity of multinational enterprise group activities means it is difficult to produce business statistics and macroeconomic statistics and correctly and consistently reflect MNE group activities in European statistics. To better analyse cross-border transactions of large-scale multinational enterprise groups and correctly record them in statistical business registers, statisticians in the [European Statistical System \(ESS\)](#) and [European System of Central Banks \(ESCB\)](#) need to be able to observe the complete and correct economic structures of MNE groups.

Notes

Explore further

Other articles

- [Structure of multinational enterprise groups in the EU](#)
- [EuroGroups Register and industry concentration](#)
- [European profiling - experiences of National statistical institutes](#)

Database

- [Multinational enterprise groups in EU-EFTA countries by controlling country](#)
- [Persons employed in multinational enterprise groups by size class](#)
- [Multinational enterprise groups in EU-EFTA countries by controlling country, size class and NACE Rev.2 activity](#)
- [Multinational enterprise groups employment by controlling country group size class, NACE Rev. 2 activity and country of work](#)
- [Enterprise statistics by size class and NACE Rev. 2 activity](#)

Thematic section

- [Statistical business registers \(SBR\)](#)

Methodology

- [Multinational enterprise groups methodological note](#)
- Methodology on enterprise groups and registers is available in the [Business registers Recommendations manual](#)
- Methodology on the compilation of the EuroGroups Register is available in the [European business statistics compilers' manual for EGR](#)
- EuroGroups Register metadata [EuroGroups Register metadata](#)

Legislation

- [Regulation \(EEC\) No 696/1993](#) of 15 March 1993 on the statistical units for the observation and analysis of the production system in the Community ([Summary](#))
- [Directive 2009/38/EC](#) of the European Parliament and of the Council of 6 May 2009 on the establishment of a European Works Council or a procedure in Community-scale undertakings and Community-scale groups of undertakings for the purposes of informing and consulting employees (Recast) (Text with EEA relevance)
- [Regulation \(EU\) 2019/2152](#) of the European Parliament and of the Council of 27 November 2019 on European business statistics, repealing 10 legal acts in the field of business statistics
- Implementing [Regulation \(EU\) 2020/1197](#) of 30 July 2020 laying down technical specifications and arrangements pursuant to Regulation (EU) 2019/2152 of the European Parliament and of the Council on European business statistics repealing 10 legal acts in the field of business statistics