



THE ECONOMIC AND SOCIAL RESEARCH INSTITUTE



ANNUAL REPORT
2012



THE ECONOMIC AND SOCIAL RESEARCH INSTITUTE

The Economic Research Institute was founded in Dublin in 1960, with the assistance of a grant from the Ford Foundation of New York. In 1966 the remit of the Institute was expanded to include social research, resulting in the Institute being renamed The Economic and Social Research Institute (ESRI).

The ESRI is governed by an independent Council which acts as the Board of the Institute with responsibility for guaranteeing its independence and integrity. The Institute's research strategy is determined by the Council in association with the Director and staff. The research agenda seeks to contribute to three overarching and interconnected goals, namely, economic growth, social progress and environmental sustainability. The Institute's research is disseminated through international and national peer reviewed journals and books, in reports and books published directly by the Institute itself and in the Institute's working paper series. Researchers are responsible for the accuracy of their research. All ESRI books and reports are peer reviewed and these publications and the ESRI's working papers can be downloaded from the ESRI website at www.esri.ie

The Institute's research is funded from a variety of sources including: an annual grant-in-aid from the Irish Government; competitive research grants (both Irish and international); support for agreed programmes from government departments/agencies and commissioned research projects from public sector bodies. Sponsorship of the Institute's activities by Irish business and membership subscriptions provide additional income.

Further information is available at www.esri.ie



The Council is the Institute's overall governing body and acts as its Board of Directors. In association with the Director and staff, it develops the Institute's programme of research. It meets quarterly.

The Council

MEMBERS AT 31 DECEMBER 2012



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Annual Report

for the year ended 31 December 2012

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1. INTRODUCTION

The Institute's mission is to produce research that contributes to understanding economic and social change and that informs public policymaking and civil society. The Council oversees strategic direction, ensures that research is relevant to current economic and social issues and sets the required quality standards. The Council is also responsible for governance within the Institute. Council members play no role in preparing or commenting on specific research outputs.

The Council's Introduction provides a brief overview of the Institute's research in 2012 and progress on the Institute's strategic plan 2008-2013 is set out in Appendix 1 to this introduction. Section 2 contains summaries of research in each programme area and further details are published on the website in the *Review of Research 2012*. Section 3 outlines survey and data analysis activities and Section 4 lists all staff, 56 of whom are engaged primarily in research.

Research Findings

The Council notes that research during 2012 focussed on many key issues facing policymakers in the current climate of austerity.

- **Property Tax:** The Troika has encouraged the government to introduce a property tax. ESRI research examined key issues in the design of such a tax and its distributional impact. This research fed directly into the deliberations of the Inter-Departmental Group on *Design of a Local Property Tax* whose report was published in mid-2012.
- **Household Joblessness and Childhood Deprivation:** Research provided new evidence to inform the Government's target-setting for poverty reduction in the recession.
- **Healthcare Pharmaceuticals:** The Troika has identified the need to address the high cost of healthcare pharmaceuticals as part of healthcare reform and cost containment. ESRI research provided a roadmap for the delivery of healthcare pharmaceuticals that ensures continuity of supply and value for money for both the taxpayer and the cash-paying patient.
- **Higher Education:** A major study considered the challenges posed by the current funding model which is unsustainable given current participation levels. It identified the need to improve access and more closely align course provision with labour market needs. The study also provided new estimates of the demographic demand for Higher Education up to 2030.
- **Export Growth:** While exports have performed well since 2008, foreign sales of indigenous enterprises have not been strong. Research on the connection between exporting and innovation performance cast light on the need for greater policy integration in this area.
- **Immigration:** Research on immigration found that immigrants were more likely than native Irish people to suffer employment loss, but no more likely to receive welfare benefits. At the same time, they were less likely than native Irish people to receive training. These findings help inform decision making in relation to integration of immigrants into Irish society.

The *Economic Renewal* research series, completed in 2012, explored lessons that Ireland can learn, from international and national evidence, to address major policy questions such as: the role of competition and regulatory policy during a recession; how policy can help improve individual financial decision making; whether there is a role for loan-to-value limits in combating rising house prices; and how earning and labour costs in Ireland have changed since the start of the recession.

Independence and Funding

The Council fully supports ESRI researchers' strong commitment to providing independent, high quality and objective research to inform public policymaking and civil society. To be of value to Ireland, the Institute's research must be fully independent of government and of interest groups. The Council welcomed the Taoiseach's and other Dail members' endorsements of the Institute's independence during 2012. Independence is ensured by the contractual relationships between the Institute and its clients and underpinned by the commitment to publish findings whether or not they make difficult reading for the clients. Quality and independence are also supported by a rigorous peer review system.

The Council acknowledges the contribution of the government departments and agencies which funded research programmes in 2012. It particularly welcomes multi-year funding which allows greater flexibility to address policy issues and take a longer term perspective.

The Council extends its thanks to the individuals and companies that are subscribing ESRI members for their continued support. Membership subscriptions contribute to ensuring the Institute's independence. The Council would like to see the Institute increase its funding from non-governmental sources, as long as the Institute's core value of 'Independence' is not at risk. The forthcoming strategy will explore this.

Council Governance

Members of the Council were saddened to learn of the death of Donal Nevin in December 2012. In 1960, Donal was one of the original founding members of the ESRI. He served with distinction on the ESRI Council, including as President, until his retirement in May 2004. His contribution is greatly appreciated by the Council and staff. The Council also noted with sadness the death of former ESRI Secretary John Roughan, who provided dedicated service over more than 20 years up to his retirement in 2000.

Early 2013 saw the passing of Dr Kieran Kennedy, Director of the Institute from 1971 to 1996, and of Sir George Quigley, who was a member of the Council for 12 years. While a matter for the 2013 annual report, the Council believes that it is important to note now their passing at this point.

In 2012 Laurence Crowley began a three-year term as Chairman of the Institute. Three new Council members were appointed: Pdraig McManus (former Chief Executive, ESB), Brid O'Brien (Head of Policy and Media, Irish National Organisation of the Unemployed), and Paul Johnson (Director, Institute for Fiscal Studies, London). In November 2012, Pdraig White resigned as a member of the Council. The Council acknowledges with thanks his devoted service to the Institute over many years.

Staff

The Council wishes to compliment staff members on their flexibility in adjusting their activities to respond to new demands, such as those emanating from the Troika, and to generate funding for the Institute. The Institute's funding model requires the strong commitment of staff and their contribution has helped to ensure that the financial sustainability of the Institute.

Financial Outturn for 2012

The Council is pleased that the financial outturn for 2012 showed a small surplus, in the face of very challenging funding conditions. However, it is aware that the Institute is currently benefiting from exceptionally low interest rates, which cannot be expected to continue indefinitely. Furthermore, it is aware that the Institute faces new financial challenges in 2014 with the transfer of the Health Research and information Division to a new agency which is being established by the Department of Health, as part of its new 'money follows the patient' policy. This will reduce the scale of the Institute's activities significantly, requiring adjustments on both the Institute's costs and its generating funding from new sources.

Challenges Ahead

Notwithstanding the Institute's considerable success in meeting its strategic objectives (see Appendix 1), while maintaining its financial stability, the Council notes with some concern the continuing difficulties in raising new funding for long-term research programmes, in the context where government departmental and agency budgets continue to be reduced. Key policy areas affected include labour market, education, migration, and enterprise development. The Council believes that such programme funding or new sources of external multi-year funding are essential to the Institute to allow it to maintain and develop the expertise which enables it to address major research questions in these key policy areas.

To address these challenges, the Institute is currently preparing a new research strategy for the period 2014-2018, informed by wide consultation with external and internal stakeholders.

Laurence Crowley
Chairman

Frances Ruane
Director

2. OVERVIEW OF ESRI RESEARCH PROGRAMMES

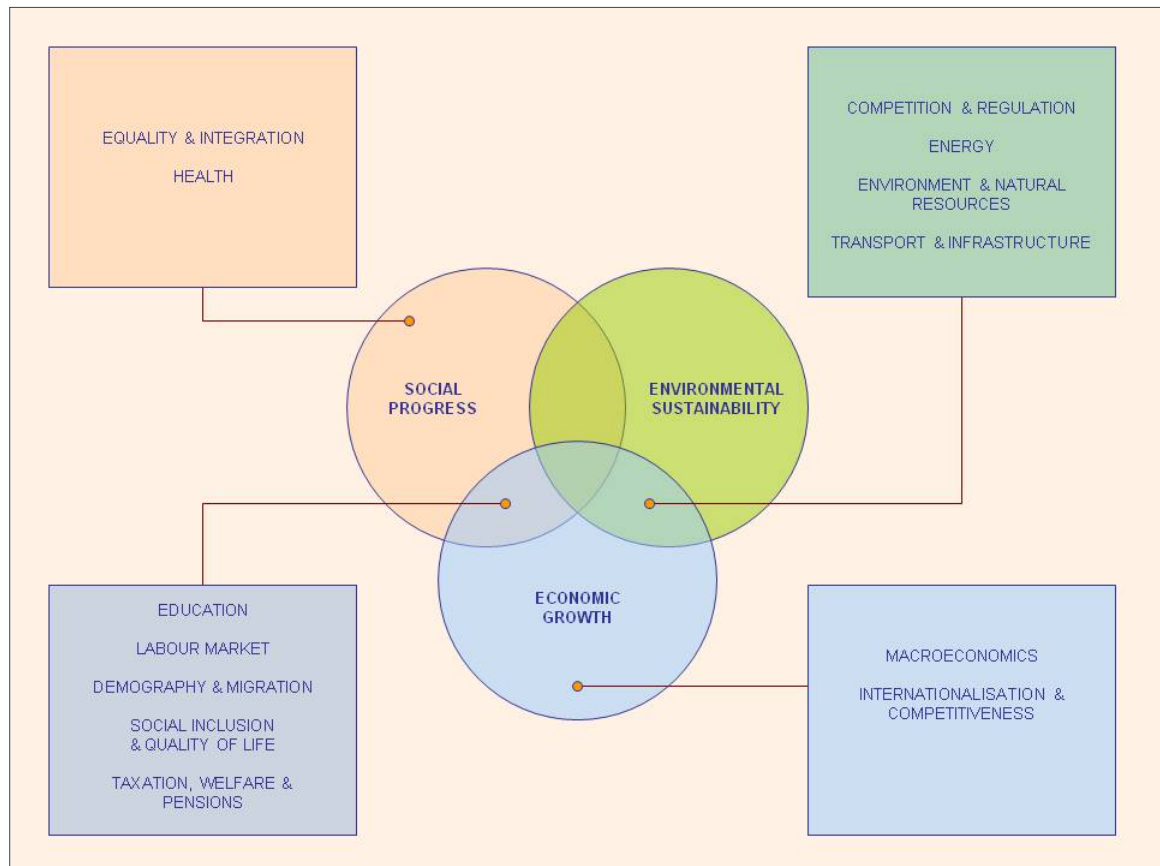
The ESRI's 13 research programmes are grouped under four general headings:

Research which is focused on informing policies related to Economic Growth.

Research which seeks to inform policies relating to Social Progress.

Research at the interface between Economic Growth and Social Progress.

Research at the interface between Economic Growth and Environmental Sustainability.



(I) ECONOMIC GROWTH

There are two programmes of research: **Macroeconomics** (coordinated by Professor John FitzGerald) and **Internationalisation and Competitiveness** (coordinated by Dr Iulia Siedschlag).

Macroeconomics

A major feature of the work of macroeconomic researchers in the ESRI over many years has been the development and maintenance of a suite of economic models. This suite of models has been used extensively in a range of studies on medium-term macroeconomic forecasting and policy analysis and also to inform studies of other aspects of the economy, such as energy demand, environmental impact, skills needs, and housing demand. Over the past number of years, the research of the division has focused on the macroeconomic consequences of the crisis for the Irish economy. The results of this research are published on a regular basis in the *Quarterly Economic Commentary*.

A new 3-year programme of joint research on macroeconomic modelling with the Central Bank of Ireland commenced in 2012. This programme will develop new models for analysing the major policy questions currently facing the economy.

The ESRI's continuing work on measuring and understanding the role of fiscal policy in Ireland was reflected in publications that considered the fiscal stance since the beginning of the crisis, as well as the appropriate approach of fiscal policy over the next few years. This research suggested that it was important to stick to medium-term fiscal plans. The *HERMES* model of the Irish economy was used to estimate the multiplier effects of changing different types of taxation, suggesting that taxes on property and carbon would be less damaging to employment than taxes on labour. A separate study was undertaken jointly with the Central Bank of Ireland into the implications for Ireland of a financial transactions tax.

The evolution of the housing market in recent years has been a key feature of the current crisis. Recent research examined the factors that will be important in the future evolution of that market, and the potential role of loan-to-value ratio limits in dampening house prices. Research also explored the tradable sector's role in the recent performance of the Irish economy, as well as the recent performance of exports.

ESRI research on the broader EU Economy considered the implications of developments in that economy for Ireland. This research suggested that the pattern of past adjustments in Europe holds lessons for the current situation. In collaboration with its colleagues in EUROFRAME, a forecast for the Eurozone economy was published by the ESRI early in 2012.

Finally, a number of studies were undertaken into how economic decision making in Ireland could be improved by access to suitable evidence. This research strand also considered the possible implications of recent insights in behavioural economics for economic decisionmaking.

Internationalisation and Competitiveness

This Research Programme aims to provide empirical evidence on key factors and policies underlying Ireland's competitiveness and economic growth in the context of increased global interdependencies. Specifically, it focuses on the links between economic internationalisation, technological change, innovation, productivity, and employment growth. Research in 2012 addressed three themes:

a) *Internationalisation of Services, Innovation, and Productivity.* This research is part of an international project (SERVICEGAP) funded under the **EU RTD 7th Framework Programme**. It examined patterns of international trade in service enterprises, analysed the links between international investment, productivity and employment growth in service enterprises, and examined the relationships between the internationalisation of service enterprises and their innovation and productivity performance. The research provided novel empirical evidence from Ireland and other European Union countries on: (i) the extent of the internationalisation of service enterprises; (ii) the effects of internationalisation of services on enterprise innovation, productivity and employment growth; and (iii) similarities and differences across manufacturing enterprises. This empirical evidence feeds directly into the knowledge base for designing policies in the context of *Europe 2020*, the European Union's Strategy for Smart, Sustainable and Inclusive Growth.

(b) *Globalisation and Export Performance.* This research was funded under a grant from the **FBD Trust**. It examined Ireland's export performance in the context of increased globalisation over the past decade and compared it with the export performance of other European small economies. This analysis found that: Ireland's favourable product specialisation in dynamic sectors (e.g., high-tech knowledge intensive services), was accompanied by less favourable specialisation in sluggish export markets (e.g., the US, UK and the Euro Area). It also found that structural and competitiveness effects reinforced each other in support of export growth and that product specialisation rather than export market specialisation explained most of the structural and competitiveness effects.

(c) *Labour Market Institutions and Innovation.* This research was funded under the **EU RTD 7th Framework Programme (NEUJOBS)**. It explored the impact of the strictness of employment protection legislation on innovation performance in advanced economies. This analysis suggested that: (i) a targeted deregulation of labour markets (e.g., relaxing employment protection in industries with a high layoff propensity) could foster innovation intensity; (ii) reforms which facilitate greater use of temporary contracts in industries with a high layoff propensity are more likely to pay off in terms of innovation intensity than reforming the employment protection legislation for regular contracts; and (iii) labour market reforms such as relaxing employment protection regulations are likely to affect innovation performance significantly in the long run rather than in the short run.

(II) SOCIAL PROGRESS

There are two programmes of research in this area: **Equality and Integration** (coordinated by Dr Helen Russell and Dr Frances McGinnity) and **Health** (coordinated by Professor Richard Layte and Professor Miriam Wiley).

Equality and Integration

ESRI research on Equality investigates inequalities in opportunities and in outcomes, exploring the processes that lead to inequality. Research on integration also reflects these themes, with a particular focus on immigrants and ethnic minorities.

During 2012 the ESRI conducted an analysis of the experience of discrimination in Ireland using the CSO's *Quarterly National Household Survey: Equality Module 2010*, comparing selected findings with those from a similar survey in 2004. This project was co-funded by the **Equality Authority** and by the **European Union Programme for Employment and Social Solidarity — PROGRESS (2007-2013)**. Overall, the project found that the highest rate of reported discrimination was in seeking work and in the workplace, with rates of reported discrimination generally much higher among the Black ethnic group. Experience of discrimination was mostly unchanged between 2004 and 2010; the exceptions were a small rise in serious discrimination, a rise in discrimination for the Black ethnic group and a fall for those with a disability. A small scoping study, also funded by the **Equality Authority**, found considerable heterogeneity in terms of ethnicity among particular nationalities (African and Asian), suggesting that nationality is not a useful guide to ethnicity and reinforcing the case for the collection of ethnicity in national surveys.

Research commissioned by the **Equality Authority** commenced on the first systematic gender impact assessment of tax and benefit policies using *SWITCH*, the ESRI tax-benefit model. The analysis is examining the impact of policy changes by gender over the full period of the "Great Recession", 2008 to 2013.

Research monitoring migrant integration in Ireland, funded by **The Integration Centre**, compared Irish and non-Irish nationals in terms of employment, education, social inclusion and active citizenship. Two special themes in 2012 were migrants' participation in sport, using data from the *Irish Sports Monitor*, and the experience of migrant children in Irish schools, using the 9-year cohort from the *Growing Up in Ireland (GUI)* survey. Among the findings were that non-Irish nationals' active and social participation in sport was much lower than that of Irish/UK nationals, and that the children of immigrants from non-English speaking backgrounds scored worse in reading at age 9, although not in maths.

A cross-national European project with colleagues from Trinity College Dublin, funded under the **NORFACE** research stream, is examining socio-cultural integration of new immigrants in Germany, the Netherlands, Ireland and Great Britain. Themes currently under investigation include identity patterns among new migrants, religiosity, attitudes to homosexuality and the selectivity of new Polish migrants.

Members of the ESRI Integration Monitor team were actively involved in international working group meetings organised by the European Commission on measuring integration at European level, covering employment, education, social inclusion and active citizenship.

Health

The health research programme's key themes include: (i) examining the pattern of variation in health and well-being across the population and in particular, the manner in which this is related to social and economic position and (ii) analysing the structure and functioning of the Irish healthcare system and its implications for the quality of individual care, economic efficiency and sustainability and the equity of healthcare utilisation.

Research in 2012 focused on the following specific themes:

Child development and well-being.

Healthcare financing, equity and efficiency.

Economic and outcome implications of chronic disease management.

Research on child development and well-being, funded by the **Health Research Board**, utilised *Growing Up in Ireland (GUI)* data to investigate the impact of early life experiences on later child health and well-being. In the context of Ireland's increasing rate of child obesity, this project sought to quantify the risk of obesity in children at age 9 who were exclusively formula fed in infancy. Results showed that exclusive formula feeding doubled the risk of obesity, even adjusting for a large range of child and parental characteristics.

Another strand of the research examined the impact of maternal smoking in pregnancy on child psychological adjustment at age 9. It found that children of mothers who smoked in pregnancy were significantly more likely to display problematic externalising behaviours. Moreover, the risk of problematic behaviours increased with the amount smoked. Children of mothers who smoked heavily in pregnancy were 78 per cent more likely to have problematic behaviours than children whose mothers did not smoke at all during pregnancy.

In addition to reporting statistics on healthcare utilisation from the *Hospital In-Patient Enquiry (HIPE)* and *National Perinatal Reporting System (NPRS)*, research in this theme addressed issues relating to efficiency and equity in the Irish healthcare system. One strand of research reviewed activity-based funding for hospital care in five European countries and found that, while systems differed significantly, significant improvements in efficiency were observed following the introduction of activity-based funding.

Chronic disease can have serious implications for health and social care costs as well as for the quality of life of the individual. Funded by the **Irish Heart Foundation**, ESRI researchers assessed the economic cost of stroke in Ireland, estimating both direct and indirect costs for all new and existing stroke cases within one year. The research highlighted the chronic phase of the disease as accounting for the largest proportion of the annual economic cost of stroke. Ongoing projects are investigating economically efficient approaches to rehabilitation for stroke patients, together with the factors influencing length of stay in acute care.

Other research projects are investigating the cost and outcome implications of alternative ways of organising palliative care services in Ireland.

(III) ECONOMIC GROWTH AND SOCIAL PROGRESS

There are five programmes of research in this area: **Education** (coordinated by Professor Emer Smyth and Dr Selina McCoy); **Labour Market** (coordinated by Professor Philip J. O'Connell and Dr Seamus McGuinness); **Demography and Migration** (coordinated by Professor Philip J. O'Connell and Dr Alan Barrett); **Social Inclusion and Quality of Life** (coordinated by Dr Dorothy Watson and Dr Helen Russell); and **Taxation, Welfare and Pensions** (coordinated by Professor Tim Callan).

Education

The ESRI education research programme covers all levels of the Irish educational system, including early childhood education, the primary, second-level and higher education sectors, and continuing education and training. Informing policy development through engagement with stakeholders is a key feature of the research agenda.

Research on special educational needs (SEN) continued in 2012 with a large-scale multi-method longitudinal study of special classes in Irish primary and post-primary schools, funded by the **National Council for Special Education (NCSE)**. A comprehensive survey of all schools was conducted, with in-depth case-study research in a sub-sample of primary and post-primary schools. This research provides valuable insights into the nature of supports for students with SEN; it found significant variation across schools in approaches to provision for students with SEN.

Analyses of **Growing Up in Ireland (GUI)** data provided new insights into the processes influencing children's learning. A report, for the **Department of Children and Youth Affairs**, showed that children who took part in structured extra-school activities, especially cultural activities (such as music and drama classes), had higher reading and maths scores than their peers, all else being equal. Research conducted for the **National Council for Curriculum and Assessment (NCCA)** found that the time allocated to different subject areas varied significantly across primary classes, with teachers tailoring time allocation to reflect the gender and social mix of their students. This study also showed that more recently qualified teachers and those teaching girls were more likely to use active teaching methods (such as hands-on activities and group work). Research funded by **Educate Together** showed that primary school choice is shaped not only by religious belief but also by socio-economic characteristics, with significant differences found between sectors in its student profile.

Research on young people's post-school transitions is an important focus of current ESRI research on education. During 2012, work progressed on the *Leaving School in Ireland* study, funded by grants from ten key educational organisations. The survey of over 700 young people who left school in 2007 and 2008, together with in-depth interviews with a subgroup, will

provide important insights into the factors influencing their decision making on post-school pathways.

A major research project was commissioned by the **Higher Education Authority** on the key issues to be considered in assessing future demand for higher education in Ireland. Details of this project are outlined in the following section on Labour Markets.

Finally, a joint ESRI-TCD initiative is exploring the backdrop and consequences of *Investment in Education* to mark the fiftieth anniversary of its publication. A seminar in November combined oral history presentations with a critical discussion of contemporary education policy.

Labour Market

Over the course of 2012, labour market researchers focused on unemployment and human capital formation. In addition, projects also explored the issues of adult literacy and numeracy both in the workplace and amongst the unemployed. Work was also undertaken on skill mismatch, job insecurity and migration.

Research on unemployment focused particularly on the relationship between numeracy and literacy problems and long-term unemployment. A study, commissioned by the **National Adult Literacy Agency** (NALA), found that while numeracy and literacy difficulties increased substantially the likelihood of claimants becoming long-term unemployed, such problems did not represent a barrier to effective activation in the labour market. The research found that the employment prospects of individuals reporting numeracy and literacy difficulties were raised significantly following participation in mainstream state-provided training programmes.

During 2012 ESRI labour market researchers were the recipients of a **P&V Foundation** award for their work on the determinants of long-term youth unemployment. The study found that low levels of educational attainment, literacy and/or numeracy problems and a family history of long-term unemployment had the biggest impact on determining young people's likelihood of becoming long-term unemployed. The team has been commissioned by the **OECD** to undertake further work in the area of youth unemployment during 2013.

Researchers participated in a collaborative cross-country study commissioned by **CEDEFOP** examining the linkages between educational and skill mismatch and labour market transitions. Full results from this study will be published during 2013. An important preliminary finding of the research is that not all forms of mismatch have negative outcomes. Some overeducated workers are satisfied with their jobs, despite the existence of some wage penalties, suggesting

that there are compensating differentials. However, there is general evidence of a scarring effect from being overskilled.

The future direction of higher education (HE) policy is currently the focus of much debate in Ireland. Maintaining an adequate supply of graduates to the labour market is a key element in securing the future economic growth of the Irish economy. Nevertheless, the situation remains challenging with the economic crises creating uncertainty with respect to the future economic returns to participating in HE. Furthermore, the ongoing fiscal crisis has highlighted the need for a sustainable funding system of HE provision. A major ESRI study commissioned by the **Higher Education Authority** examined a range of issues linked to the future sustainability of HE in Ireland, including the likely balance between the demand for and supply of HE graduates up to 2030, the potential for moving to an income-contingent loans system, the implications of HE expansion for social inclusion and for academic progression and the need to move to more flexible modes of education delivery encompassing life-long learning.

Demography and Migration

Research within the Demography and Migration Programme covered a number of themes including patterns of welfare use by immigrants, labour market outcomes of immigrants in Ireland, migration from Ireland and population ageing.

Under funding from the **European Commission** and working with researchers at IZA (Bonn, Germany), the patterns of welfare use by immigrants across the EU were examined. The researchers found that, contrary to common perceptions, immigrants were not, in general, more likely than natives to be in receipt of welfare benefits. They also found little evidence of immigrants being disproportionately attracted to states with generous welfare systems.

Further research in this area explored the labour market outcomes of immigrants in Ireland under funding from the **Irish Research Council for Humanities and Social Sciences**. Previous ESRI research has shown that immigrants in Ireland suffered a wage penalty relative to comparable natives. This new research, which is relevant to other European countries, showed how this wage penalty varied across the earnings distribution, finding no evidence of a wage penalty at the lower end of the distribution but with the penalty rising in the upper earnings deciles. Related research showed how immigrants were less likely to receive employer-provided training. This may be a source of persistent wage differentials across immigrants and natives, in Ireland and possibly elsewhere.

Other research focused on labour market outcomes in the current recession, exploring whether immigrant employment outcomes had diverged from those of natives. The results showed that the rate of employment loss among immigrants greatly exceeded that of natives, with

implications for the immigrants themselves and for the functioning of the labour market in Ireland.

The interaction of the recession and migration was also addressed in research which assessed the characteristics of those migrating out of Ireland, using the *Census of Population 2011*. Among other findings, the research showed that between 2006 and 2011, of the native Irish population aged 20-29, almost 40,000 more left the country than arrived, equivalent to 10 per cent of men and 5 per cent of women.

Research on migration was also published through the work of the European Migration Network (EMN), funded by the **Department of Justice and Equality**, and through the Annual Monitoring Report on Integration, funded by **The Integration Centre**. One of the EMN's reports dealt with the issue of irregular migration to Ireland, providing details of the legal and administrative systems. The integration report had a special focus on children and found immigrant children to be highly motivated, with a more positive attitude to school when compared to their native peers.

Population ageing forms another strand of research within this programme using data from the *Irish Longitudinal Study on Ageing (TILDA)*. The topics covered included an examination of the incomes of Ireland's retirees and the critical role played by supplementary pensions in creating large income differences across groups.

Social Inclusion and Quality of Life

Social inclusion refers to the capacity of people to participate in economic and social life, linked to access to adequate material and other resources. Quality of life is concerned with the balance between material well-being, physical and mental health, family life, labour market participation and social participation.

During 2012, three research projects funded by the **Department of Social Protection** drew on data from the annual *CSO Survey on Income and Living Conditions (SILC)* to examine childhood deprivation, household joblessness and food poverty. Key research findings were that:

- Even when resources are tight, some parents are able to protect their children from deprivation. This capacity is associated with mother's education, parent's employment – especially of the mother – and family stability.
- Household joblessness is a major risk factor for poverty. The percentage of people in jobless households increased very rapidly in Ireland after the start of the recession (15 per cent in 2007 to 22 per cent in 2010, with the latter figure double the average across Europe). The

high rate in Ireland is related both to the level of unemployment and to jobless adults in Ireland being less likely to live with a working adult and more likely to live with children.

- In 2010, ten per cent of people experienced food poverty, up from 7 per cent in 2007. Food poverty was more prevalent in younger households, large families, lone parent households, or where the householder was unemployed, ill or had a disability.

Other ongoing research projects relating to social inclusion included projects funded by the **National Disability Authority** on people with mental health disability and on children with a disability; a project on fuel poverty (funded through the **ESRI Energy Policy Research Centre**) and an analysis of the link between social class and patterns of internet use among 9-year old children (for the **ESRI Programme of Research in Communications**).

In the quality of life area, two projects are being completed in collaboration with an international research team headed by Professor Duncan Gallie at Oxford University. One deals with the impact of the economic crisis in Europe on subjective quality of life while the other analyses changes between 2004 and 2010 in the European experience of work-family conflict. These will be published in 2013.

Other projects in the quality of life area include research funded by the **Irish Sports Council** to examine the reasons people take up and drop out from sport and exercise activities. A project jointly supported by **Swim Ireland** and the **Irish Sports Council** found that swimming has grown in popularity among young adults to become (after walking) the most common sport and exercise activity in Ireland.

Taxation, Welfare and Pensions

The fiscal response to the economic crisis has been the dominant theme of ESRI research on Taxation, Welfare and Pensions. Analysis in 2012 focused on the distributive implications of policy responses, the design of a property tax and the financial incentives to work.

A key finding in terms of distributive impacts was that the policy response to the crisis has, over the full period since the Budget of October 2008, given rise to a greater proportionate fall in incomes of those on high incomes than on those at middle or low incomes. Comparative work with European partners suggests that the distributive impact in Ireland has been among the most progressive. A further finding is that the impact on elderly persons has tended to be less severe than on those of working age, for any given level of income.

Research on the design of a property tax examined the distributional impact of various potential property taxes in Ireland. Designing such a tax involves a series of choices which affect how the

burden of the tax is distributed across households. The ESRI tax-benefit model, *SWITCH*, was used to explore the implications of alternative approaches aiming to link a property tax with ability to pay. International comparisons were made to provide insights into choices regarding the structure and operation of a new tax. A key finding was that an income exemption limit below which property tax is not payable (with marginal relief for those with incomes just above the limit) could provide a powerful tool for shaping the income distribution consequences of the tax.

Research on the impact on financial incentives to work shows that calculations based on selected examples can be very misleading. For example, most unemployed people are young and single and many of those who are married do not have children. Thus, a picture of incentives facing the unemployed which focuses on the situation of a married man with children is unrepresentative. The picture provided by *SWITCH* provides a much better representation of the national situation. Ireland's welfare payment rates for unemployed people are about average in EU terms, contrary to what might be concluded from analyses based simply on example households rather than a nationally representative sample. This research has shown that the vast majority of the unemployed population receive a substantially higher cash income when in work, rather than when unemployed. Our research shows that even when childcare and travel to work costs are taken into account, about 94 per cent of individuals are financially better off in employment. Of the remaining 6 per cent, a majority are actually in employment, despite the lack of an immediate financial gain.

(IV) ECONOMIC GROWTH AND ENVIRONMENTAL SUSTAINABILITY

There are four programmes of research in this area: **Energy** (coordinated by Professor John FitzGerald and Dr Seán Lyons); **Environment and Natural Resources** (coordinated by Dr John Curtis and Dr Edgar Morgenroth); **Transport and Infrastructure** (coordinated by Dr Edgar Morgenroth); and **Competition and Regulation** (coordinated by Professor Paul K. Gorecki).

Energy

The ESRI's Energy Policy Research Centre (EPRC) is funded by the **Department of Communications, Energy and Natural Resources**, the **ESB**, **BGE**, **Eirgrid**, **Viridian** and the **Commission for Energy Regulation**. Researchers also collaborate with UCD, TCD, UL and NUIM on the Sustainable Electrical Energy Systems Research Cluster, funded by **Science Foundation Ireland** and with UCC on a project funded by the **Environmental Protection Agency**.

Research on residential energy demand in Ireland using micro data explored the effect of time of day pricing on electricity demand, the determinants of appliance use, the socio-economic distribution of emissions and resource use, and the scope for electricity market segmentation. "Time of Use" tariffs for electricity and better information in bills reduce electricity consumption, but there is no evidence that consumers respond more strongly as the ratio of peak to off-peak prices rises.

Research based on data from the *Census of Industrial Production* estimated elasticities of substitution between the inputs (capital, labour, energy) of manufacturing firms, showing how energy use in manufacturing firms responds to changing prices and activity levels.

A new set of econometric models has been estimated describing the determinants of the demand for fuels and electricity in Ireland. The estimates are used in the ESRI forecasting model for environmental accounts (*ISus*) to forecast the demand for different fuels up to 2030 and for policy analysis, e.g. to quantify the impact of carbon tax scenarios. ESRI researchers are also collaborating with researchers in UCC on a medium to long-term energy systems model for Ireland.

The extent to which the benefits of domestic energy efficiency are reflected in house prices and rents was explored using a hedonic model developed in collaboration with Ronan Lyons of the University of Oxford and DAFT.ie. The results show that energy efficiency has a positive effect on both the sale and rental prices of properties, and that the effect is significantly stronger in sale prices.

The economic implications of replacing Moneypoint in 2025 with different technological options were evaluated. None of the plants considered prove to be optimal overall, and the research explored the advantages and disadvantages of delaying the decision.

Research explored how the all-island wholesale electricity market, SEM, should be reformed to comply with the European Target Model by 2016. Results indicated that making minimal changes to the SEM to comply with the Target Model is probably preferable to the reinvention of the SEM.

Researchers modelled the effects of increasing wind generation on thermal plants' return to investment and examined the historic relation between electricity generated by wind and SEM prices. Ongoing research compares electricity prices in Ireland and Great Britain to ascertain whether current wholesale and retail prices in each jurisdiction are too high or too low.

Environment and Natural Resources

Research on environment and natural resources in 2012 focused on (i) extending and improving the ESRI forecasting model for environmental accounts (*ISus*); (ii) regional environmental emissions; (iii) the effect of nutrient emissions on water quality; (iv) waste management and (v) climate policy.

Significant work was carried out on the Green Net National Product for Ireland project for the **Environmental Protection Agency (EPA)**, a project which involved the ongoing development of the Irish Sustainable Development Model, *ISus*. A new agricultural sub-model was developed within *ISus* that now better integrates Teagasc's projections of the agricultural sector. In addition, spatial models of historical emissions were developed for agriculture and transport emissions which enable analysis of emissions at district electoral division level. The *ISus* model was also refined to project emissions from the Emissions Trading Scheme (ETS) and non-ETS sides of the economy, as policy targets differ between these two categories.

An analysis of water quality linked the variation in water quality across Irish lakes to a range of contributory factors such as septic tanks, urban waste water treatment, phosphorous excreted by livestock, as well as catchment soil and geology. Key findings in the analysis were estimates of the contribution of septic tanks, livestock and forestry to poor water quality. For example, in the case of livestock, catchments with high livestock populations have a proportionately greater negative impact on water quality. The analysis demonstrated the feasibility of using data based on administrative boundaries (e.g., district electoral division) for modelling environmental issues within environmental spatial boundaries (e.g., lake catchments).

New waste projections were developed during the year, which the **Environmental Protection Agency (EPA)** incorporates into its annual National Waste Report. The projections suggested that household and municipal waste generation would return to a growth trend in the next few years and that a substantial expansion waste treatment capacity will be required to maintain compliance with the Landfill Directive targets in future years. A sensitivity analysis of parameters in the *ISus* waste model concluded that assumptions about general economic growth are more critical than those about household waste behaviours for projecting municipal waste generation.

In the climate policy area, new projections of emissions targets were developed which indicate that, based on existing trends, Ireland will not comply with its committed targets for 2020. A scenario analysis of the impact of an EU proposal to delay auctioning of ETS allowances found that a proposed carbon price floor being introduced by UK authorities will have a greater impact on Irish electricity prices and emissions than the EU proposal.

Transport and Infrastructure

During 2012 research on transport and infrastructure focused on areas including the valuation of rail access; the potential demand for electric cars; the exchequer impact of a fuel rebate; the impact of climate on tourism and issues related to the establishment of *Irish Water*. In addition, research was also conducted on transport mode choice for different journey purposes and the identification of the determinants of rail mode share.

The research on the value of rail access was carried out as part of an **Environmental Protection Agency** funded project. It applied a hedonic model of house prices in Dublin to identify the impact of proximity to rail infrastructure. The research found that while proximity to rail stations increases property values, being close to rail lines decreases the value. Proximity to the LUAS tram services was found to increase property values by more than being close to either the DART or mainline services.

This project also explored the likely penetration of electric cars. This involved quantifying the value placed on particular car characteristics, including price and fuel consumption, by purchasers of cars. Given the characteristics of electric cars the potential demand was then estimated. The results show that the achievement of government targets on electric car penetration would require extremely high subsidies.

As part of a major **EU RTD 7th Framework Programme** project, the impact of climate on tourism was investigated. The determinants of holiday destination choice for tourists from 182 countries over a fifteen-year time period were analysed. The results suggest that tourists prefer to stay relatively close to their home country and have a preference for countries that have a long coast

and lots of heritage sites. Of specific relevance to Ireland is that a high level of rainfall was not found to deter tourists, but all else being equal tourists prefer a warm climate but dislike excessive heat. Therefore, changes in precipitation and temperature due to climate change could be expected to change the pattern of international tourism.

A report on the exchequer impact of the introduction of an essential fuel user tax rebate on diesel fuel was produced for the **Department of Transport, Tourism and Sport**. This showed that the introduction of such a rebate would have a significant negative impact on the exchequer.

Finally, a submission on the establishment of a public water utility and the funding of water services was submitted to the **Department of the Environment, Community and Local Government**. The submission highlighted the potential macroeconomic benefit of the establishment of *Irish Water* but also identified a number of issues, such as the means by which poor households are to be protected, that will need to be considered in the light of careful analysis.

Competition and Regulation

This research programme focuses on the necessity, efficiency and effectiveness of State intervention in the marketplace. Competition policy addresses economy-wide issues including merger control, restrictive agreements and the exercise of market power by dominant firms. In contrast, the focus of regulation is on specific sectors such as telecommunications, energy or household waste. Nevertheless, competition issues are often discussed in relation to competition in a specific market.

During 2012 the Programme for Research in Telecommunications, funded by the **Department of Communications, Energy and Natural Resources** and the **Commission for Communications Regulation**, concentrated on four topics:

Modelling the market for broadband services.

Economic and social aspects of broadband availability and adoption.

Effects of electronic communications services on company performance.

Implications of behavioural economics for economic regulation and consumer protection.

Research topics included: choice, price and service characteristics in the Irish broadband market; whether behavioural biases constitute a fourth market failure; broadband adoption and manufacturing productivity; the effects of broadband provision on Irish primary schools; and socio-economic influences on the use of the internet by Irish children. The research found, for example, that in the Irish broadband market, the marginal valuation of download speed

decreases as the speed level increases, with little value currently placed upon speeds above about 60 Mb/s.

Research was conducted on extended producer responsibility compliance schemes, which involve producers bearing a significant degree of responsibility for the environmental impacts of their products. A compliance scheme typically assists in the collection of a particular waste stream (e.g. Repak, packaging) and is accountable for meeting certain environmental targets. The research is investigating, for example, whether the current compliance scheme arrangements are inhibiting competition and, if so, how this situation can be improved. The research is funded by the **Department of the Environment, Community and Local Government** as part of a larger project in collaboration with RPS Group, Bio Intelligence Services and Philip Lee, Solicitors. The research is scheduled for completion in early 2013.

Finally, research was carried out on the impact of the recession on competition and regulatory policy. The international evidence suggests that relaxing competition and regulatory policy during bad economic times may deliver transitory benefits but that it is an economically costly policy. In the case of competition policy the initial reaction of policymakers in 2008/10 was to relax policy, through, for example, proposals for carve outs/exemptions from competition law, but the EU-IMF Programme of Financial Support for Ireland set a strongly pro-competition agenda. In the taxi market, regulatory measures including the prohibition on new taxi licences and limiting market flexibility is likely to lower service quality (e.g., increased waiting times, less fare discounting).

3. ESRI SURVEY AND DATA ANALYSIS

Commissioned National Study of Children

During 2012 work continued on the national longitudinal study of children – the *Growing up in Ireland (GUI)* project. This programme is funded by the **Department of Children and Youth Affairs** in association with the **Department of Social Protection** and the **Central Statistics Office**. It is being carried out by a consortium led jointly by researchers at the ESRI and Trinity College Dublin.

A very significant step for the project was the announcement on 30 May, by Minister for Children and Youth Affairs, Frances Fitzgerald TD, that funding would be available for a third round of data collection with the younger children in the study, when they will be 5 years of age. This is a critical stage in a child's development as she/he makes the transition to school. Questionnaire development commenced immediately in June and, following ethical approval, pilot fieldwork in the children's homes took place in October/November. This pilot was followed by fieldwork in their schools. It is envisaged that the main phase of home-based data collection with the 5-year-olds will take place in March to September 2013, with school-based fieldwork taking place throughout the 2013/2014 academic year.

The second round of data collection with the older cohort in the study (when the children were 13 years of age) was carried out in the first half of 2012. A total of 7,800 children and their families participated, representing a response rate of 90 per cent.

March 2012 saw the launch of a report by Minister Fitzgerald on *How Families Matter for the Social and Emotional Outcomes of 9 Year Old Children*. This was followed by a policy seminar which was addressed by An Taoiseach, the Minister for Children & Youth Affairs and several key policymakers from the Departments of Children & Youth Affairs, Social Protection and Health, as well as by the Institute's Director and GUI's Principal Investigator.

Six data workshops on the GUI data were held throughout 2012. These were attended by a large number of researchers, policymakers and other stakeholders.

The fourth GUI Annual Research Conference was held on 29 November. It marked the launch of the first findings from the 13-year-olds and included over 20 papers based on both 9-year and 9-month cohorts from the study. The Keynote address, entitled *The Importance of Longitudinal Studies for Policy and Practice*, was given by Professor Lucinda Platt, Director of the Millennium Cohort Study and Professor of Sociology at the Institute of Education, University of London.

Commissioned National Health Data Programmes

The **Health Service Executive** funds the ESRI to manage and develop two national data bases collecting health information from administrative records. During 2012, reports for the National Perinatal Reporting System were published for 2010 and 2011 and a report for the Hospital Inpatient Enquiry was published for 2011:

(http://www.esri.ie/health_information/latest_hipe_nprs_reports/).

In addition to publishing reports, responsibilities for these data systems include development of the relevant software, training of all clinical coders nationally, regular updating of the national databases, facilitating access to the data and ensuring that data quality checks are applied and quality standards supported.

In 2012, 6 updates to the national software for collecting and reporting on HIPE data were delivered, 1,400 IT support calls were processed and 29 national file updates released. A total of 53 training courses were delivered to 647 participants across a range of areas including clinical coding, quality review, report development etc. In addition, over 500 coding queries were processed. With regard to data quality initiatives, almost 15,000 checks were issued throughout the year. Targeted data quality initiatives were undertaken in collaboration with the Department of Health and the Quality and Safety Directorate of the HSE. As a response to the specific data requirements of a number of HSE clinical programmes, a dedicated data collection facility has been integrated into the HIPE Portal to meet the data needs of the programmes working on stroke, cardiac care, hip fracture and chronic obstructive pulmonary disease.

The development of the HIPE Online Portal (HOP) has been an important step towards ensuring that relevant users have easy, prompt and appropriate access to the national databases. With this facility, a secure remote desktop protocol allows authorised users access HIPE data and the HIPE Portal Reporter tools. All HIPE national files are now released via the HOP server and its fileserve module. As of December 2012, there were around 50 registered HOP users from various organisations including the HSE, National Casemix Programme, HIQA, National Cancer Control Programme etc. In addition to the HOP, data can also be accessed via the HIPE online reporter on the ESRI website. In 2012, close to 90 requests for HIPE or NPRS data were completed for users with specific requirements.

Advancing the research potential of the HIPE and NPRS databases continued throughout the year with conference presentations and publications on a range of issues including breastfeeding, stroke and resourcing hospital services. Towards the end of the year a number of new projects were commenced including (i) a review of rehabilitation services for stroke survivors for the Irish Heart Foundation, (ii) an investigation of factors impacting on Caesarean Section Rates for the HRB and (iii) the development of performance indicators for patient safety for the HIQA.

4. STAFF AND PROGRAMME COORDINATORS AT 31/12/2012

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Claire Delaney
Jackie Gleeson
Aoife Murphy
Aisling Murray
Pauline Needham
Amanda Quail
Elizabeth Ryan
Maeve Thornton
James Williams (*Division Manager*)

** On Secondment.

PROGRAMME COORDINATORS

Economic Growth

There are two programmes of research in this area:

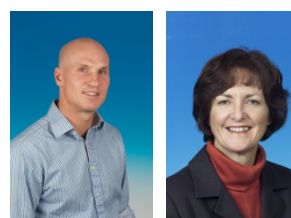
- **Macroeconomics** (Professor John FitzGerald)
- **Internationalisation and Competitiveness** (Dr Iulia Siedschlag)



Social Progress

There are two programmes of research in this area:

- **Equality and Integration** (Dr Helen Russell and Dr Frances McGinnity)
- **Health** (Professor Richard Layte and Professor Miriam Wiley)



Economic Growth and Social Progress

There are five programmes of research in this area:

- **Education** (Professor Emer Smyth and Dr Selina McCoy)
- **Labour Market** (Professor Philip J. O'Connell and Dr Seamus McGuinness)



- **Demography and Migration** (Professor Philip J. O'Connell and Professor Alan Barrett)



- **Social Inclusion and Quality of Life** (Dr Dorothy Watson and Dr Helen Russell)



- **Taxation, Welfare and Pensions** (Professor Tim Callan)



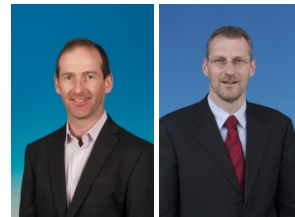
Economic Growth and Environmental Sustainability

There are four programmes of research in this area:

- **Energy** (Professor John FitzGerald and Dr Seán Lyons)



- **Environment and Natural Resources** (Dr John Curtis and Dr Edgar Morgenroth)



- **Transport and Infrastructure** (Dr Edgar Morgenroth)



- **Competition and Regulation** (Professor Paul K. Gorecki)



5. APPENDIX 1: PROGRESS ON THE IMPLEMENTATION OF THE RESEARCH STRATEGY 2008-2013

Objective 1: enhancing research quality and quantity through a continuing focus on producing peer-reviewed publications and increasing collaborative research:

- In 2012 researchers produced 57 journal articles, 7 book chapters, 38 reports, 5 papers on Economic Renewal, 5 research bulletins and 28 working papers.
- Collaborations with Trinity College included setting up a new Joint Centre for Longitudinal Studies and new projects in energy, health, education and migration.
- Collaborations are ongoing with other Irish universities on energy (UCD, UCC, UL and NUIM), social inclusion (UCD) and health (QUB, RCSI) and with European institutes and universities on labour economics, migration, health, equality, macroeconomics, and international economics. Researchers contributed 44 papers to international conferences during 2012.

Objective 2: stronger policy contribution via greater engagement and collaboration with policymakers through research programmes, conferences, workshops, etc:

In 2012, ESRI researchers organised 10 policy conferences and seminars and participated in over 90 Irish policy conferences/workshops/seminars. One such event was a policy seminar linked to the launch of the GUI study *How Families Matter for the Social and Emotional Outcomes of 9 Year Old Children*, which was addressed by An Taoiseach, Mr Enda Kenny T.D. and the Minister for Children & Youth Affairs, Ms Frances Fitzgerald T.D.

The Institute's strong engagement with Irish health system reform continued in 2012. Research included an analysis of conflicting financial incentives in the health-care system and a comparative analysis of Ireland's health system performance in the context of a review of 10 European health-care systems.

Objective 3: enhancing societal understanding through wide dissemination of research findings and increasing free access to outputs: In 2012

- All ESRI research reports and conference/workshop papers are made available on the ESRI website.
- *Research Notes*, short papers pertinent to the analysis in the *Quarterly Economic Commentary*
- ESRI researchers participated in over 100 media presentations/briefings, wrote 13 newspaper & magazine articles, and participated in over 170 TV/Radio broadcasts.

Objective 4: developing a comprehensive data strategy, building on CSO data, in order to provide evidence-based policy analysis. ESRI researchers are major users of CSO micro data.

In 2012, 80 ESRI users accessed research micro data from key CSO surveys: QNHS, SILC, HBS, *Growing up in Ireland*, Census of Agriculture, Census of Industrial Production, and the Census of Population.

The second survey of the older group (now 13 years of age) in the *GUI* longitudinal study was completed and these data will be deposited in the Irish Social Science Data Archive (ISSDA). The Council particularly welcomed the news that the Department of Children and Youth Affairs will fund a third round of data collection with the younger group, now five years of age. Over 175 participants (researchers, policymakers and other stakeholders) attended workshops on using *GUI* data.

The Council was also pleased to note the increased access to the national database on hospital activity developed at the Institute, via a new online portal. A dedicated clinical data collection facility was integrated within the Portal to provide data for researchers and analysts working on stroke, cardiac care, hip fracture and chronic obstructive pulmonary disease. This has supported increased research by health multidisciplinary teams.





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