Annual Report 2025

AN INSTITIÚID UM THAIGHDE EACNAMAÍOCHTA AGUS SÓISIALTA
ESRI ECONOMIC & SOCIAL RESEARCH INSTITUTE

Informed policy for a better Ireland

ABOUT THE ESRI

The Economic and Social Research Institute (ESRI) advances evidence-based policymaking that supports economic sustainability and social progress in Ireland. ESRI researchers apply the highest standards of academic excellence to challenges facing policymakers, focusing on ten areas of critical importance to 21st century Ireland.

The Institute was founded in 1960 by a group of senior civil servants led by Dr T.K. Whitaker, who identified the need for independent and in-depth research analysis. Since then, the Institute has remained committed to independent research and its work is free of any expressed ideology or political position. The Institute publishes all research reaching the appropriate academic standard, irrespective of its findings or who funds the research.

The ESRI is a company limited by guarantee, answerable to its members and governed by a Council, comprising up to 14 representatives drawn from a cross-section of ESRI members from academia, civil services, state agencies, businesses and civil society. Funding for the ESRI comes from research programmes supported by government departments and agencies, public bodies, competitive research programmes, membership fees, and an annual grant-in-aid from the Department of Public Expenditure, NDP Delivery and Reform.

Further information is available at www.esri.ie.

The role and responsibilities of the Council are set out in the ESRI's Articles of Association. The following key matters are reserved for Council decision: approval of the organisation's long-term objectives and operational strategy; approval of significant acquisitions and investments; approval of major contracts; approval of the annual operating and capital expenditure budgets; approval of the Annual Report and financial statements; appointment and remuneration of the Director. The Council meets quarterly and is supported by its three sub-committees: Audit and Risk, Business and Operations (now Strategy Oversight), and Governance and Nominations. Section 6 provides a short biography of Council Members.

The Council

MEMBERS AT 31 DECEMBER 2025

Mr S. O'Driscoll,
President and Chairperson

Professor M. Lawless,
Director

MR SEAN O'DRISCOLL, President and Chairperson

PROFESSOR MARTINA LAWLESS*, Director, Economic and Social Research Institute

MR SHAY CODY, former General Secretary, Fórsa

PROFESSOR KATY HAYWARD, Queen's University Belfast

PROFESSOR THIA HENNESSY, University College Cork

PROFESSOR BRIGID LAFFAN, Emeritus Professor, European University Institute

MR GABRIEL MAKHLOUF, Governor, Central Bank of Ireland

PROFESSOR SANDRA McNALLY, University of Surrey, UK

MR DAVID MOLONEY, Secretary-General, Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation

PROFESSOR CIARÁN Ó hÓGARTAIGH, Member of the Council of State

MS ANNE O'LEARY, Head of Meta Ireland and VP, Global Business Group, EMEA

MS ANNE VAUGHAN, Non-executive director of a number of charitable bodies.

**Alan Barrett's term as ESRI Director ended on 31 May 2025. Martina Lawless's term as ESRI Director commenced 1 June 2025.*

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1. INTRODUCTION

The Institute's Strategy 2024–2028 guides the Institute in delivering independent, rigorous research to inform policy development, while ensuring the Institute's long-term financial sustainability. The Council of the Institute supports this mission by setting and overseeing the Institute's strategic direction, ensuring the highest standards of quality and a research agenda that addresses Ireland's key economic and social challenges. As the Institute operates with full academic independence, the Council does not influence or direct the content of research outputs. The Institute maintains strong governance and accountability through adherence to the Code of Practice for the Governance of State Bodies (2016).

The following sections outline the Council's assessment of the effectiveness of the Institute in achieving its mission as well as its overview of the Institute's environmental, social and governance (ESG) arrangements.

1.1 INDEPENDENCE AND FUNDING

It is the policy of the Institute that all research reaching the required academic standard is published, regardless of its findings or the source of funding. This commitment to independence and objectivity is safeguarded through the implementation of the Institute's policies and through formal contractual arrangements with funders. Robust peer review processes are implemented, ensuring that research outputs meet the highest academic standards. Additionally, the Institute undergoes an independent peer review process every five years, to ensure adherence to these principles. The next such independent peer review will be carried out in 2027. The report from the previous 2022 review process is available on our website (www.esri.ie).

The Council is pleased to report that the Institute's funding has grown year on year, from c. €12.367 million in 2024 to €13.316 million in 2025 (c. 8 per cent). The annual grant-in-aid (GIA) from the Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation (DPER), has increased over previous years and accounted for approximately 30 per cent of total income in 2025. Additionally, the multi-annual research programmes with government departments and state agencies broadened in 2025, with new and renewed programmes of research. The Council acknowledges and greatly appreciates the support provided by DPER and other government departments and agencies. The Institute's Whitaker Patrons and corporate members provide another valuable funding stream. The Council recognises the sustained commitment of these Patrons and Members in supporting the Institute's independent, policy-focused research.

1.2 RESEARCH OUTPUTS IN 2025

Ireland faced a number of significant challenges in 2025, shaped by an unpredictable geopolitical environment, the impacts of international conflicts, and growing cost of living pressures. The rise of populist movements and the spread of disinformation underscored the importance of independent, evidence-based analysis in informing public debate and policymaking.

The ESRI produced evidence-based research for policy across a wide range of issues, publishing 62 articles in peer-reviewed journals, 50 reports, and seven chapters in books and reports. In addition, the Institute published 19 ESRI Research Bulletin articles and disseminated work in progress research through 18 ESRI Working Papers.

The ESRI published a longer-term Economic Outlook in 2025 which examined trends in the Irish economy and projected forward performance over a ten-year horizon. This provided macroeconomic projections under a stable external environment and also under a range of scenarios including a global trade slowdown, reductions in FDI inflows and a narrowing of the productivity gap between domestic and multinational firms. The changed trade policy of the US fed into the scenarios of the Economic Outlook and a number of other research outputs.

In 2025, ESRI research highlighted how pressures in housing, the cost of living and the low-carbon transition were shaping living standards. Housing research found that rent inflation is driven disproportionately by tenant turnover, while work on rent controls identified supply-side effects consistent with landlord exits; additional analysis profiled short-term lets and estimated substantial investment needs to upgrade rental stock for energy efficiency.

Emerging pressures from a growing and ageing population were also the focus of several pieces of work in health. Projections of demand for acute hospitals, GP services and care services for older people were published at a national level and also disaggregated to a health region level. Further work is forthcoming in 2026 on the staffing implications of these increased demands for services.

Research on living standards and social inclusion pointed to persistent inequalities, including heightened economic vulnerability among lone-parent households and evidence that poor housing is associated with worse family wellbeing. A key focus was on investigations into child poverty, monitoring its extent and the life-long impacts of growing up in deprivation. Studies simulating alternative policy interventions to assess how maximum impact on child poverty levels could be most effectively delivered were also published.

Research on migration and integration found that migrants continue to perform well on indicators such as employment and educational attainment, but face higher risks of poverty and unaffordable housing, while attitudes to immigration were more negative in disadvantaged communities.

Climate research advanced the I3E modelling framework and showed that key decarbonisation policies reduce emissions and air pollutants, but that even a 2035 phase-out of internal combustion engine vehicles would fall short of transport-sector emissions targets.

Building on our work on Northern Ireland and the all-island economy, work continued on the Shared Island Programme, with the publication of new all-island economic overview in December.

Summaries of the research outputs in 2025 are provided in Section 3 of this document, on our website (www.esri.ie) and in our annual Review of Research, which will be published in Q2 2025.

1.3 CORPORATE GOVERNANCE AND SUSTAINABILITY

The Institute incorporates environmental, social and governance (ESG) principles into its business practices to strengthen its environmental performance, uphold ethical standards in decision-making, enhance its standing amongst stakeholders and the broader community, and optimise operational efficiencies.

Council membership

The Institute's statutory ruling body is the ESRI Council, comprising up to 14 members including the Director (Martina Lawless) and Chairperson (Sean O'Driscoll). ESRI Council members are elected at the Institute's AGM for a three-year term, which can be extended by a further three years. Council members represent a cross-section of ESRI members from academia, civil services, state agencies, business and civil society.

During 2025, Thia Hennessy, Brigid Laffan, Sandra McNally and Ciarán Ó hÓgartaigh served on the Audit and Risk Committee (sub-committee of the Council). Anne O'Leary, Katy Hayward, David Moloney, Shay Cody and the ESRI Director (Alan Barrett/Martina Lawless) served on the Business and Operations Committee (sub-committee of the Council). In 2025, the Business and Operations Committee was renamed the Strategy Oversight Committee, to better reflect its activities.

Alan Barrett's term as Director ended on 31 May 2025. Martina Lawless was appointed ESRI Director in April 2025, following an extensive search and a rigorous selection process, supported by PwC Executive Search. Professor Lawless formally took up the position on 1 June 2025. Oversight of the recruitment process was provided by the Governance and Nominations Committee, comprising of Sean O'Driscoll (Chair), Ciarán Ó hÓgartaigh, David Moloney, Thia Hennessy and Brigid Laffan.

Gender pay gap

Under the Gender Pay Gap Act 2021, organisations are required to publish a Gender Pay Report. The ESRI has published its results online on the ESRI website.[1] The report shows that the mean pay gap favours women by 2 per cent, and the median pay gap stands at 20.1 per cent in favour of women. The gap reflects not just the higher proportion of women in senior roles but also the fact that pay scales are wider at senior levels.

Irish Human Rights and Equality Commission Act 2014

The Institute is committed to implementing policies and actions which are consistent with the duties conferred on public bodies by the Irish Human Rights and Equality Commission Act 2014. The Institute's work in this area, as set out in the EDI Action Plan: 2023 – 2027, page 4[2] was recognised when it was awarded the Athena Swan Bronze award in November 2023. This quality charter accreditation scheme is underpinned by a framework for higher education and research institutes to implement impactful and sustainable gender equality work and to build capacity for evidence-based equality work across the equality grounds enshrined in Irish legislation. Implementation of the action plan is overseen by the EDI Committee which meets on a quarterly basis. An annual progress report is provided to the ESRI Council. To date, five of the seven priority issues identified have been addressed.

In 2025, the EDI Committee's remit was expanded to include a further assessment of the Public Sector Duty in relation to ESRI service users, and this work is now underway.

Environmental sustainability

The ESRI recognises its obligations to contribute to Ireland's climate goals under the Climate Action and Low Carbon Development (Amendment) Act 2021 and is committed to taking action to reduce its impact on the environment. ESRI research on issues such as climate and energy makes a substantial contribution in these areas.

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1 https://www.esri.ie/system/files/publications/Gender%20Pay%20Gap%20Report%202025.pdf
2 https://www.esri.ie/publications/esri-diversity-and-inclusion-action-plan-2023-2027

Energy efficiency and greenhouse-gas emissions performance:

In accordance with public sector requirements, the ESRI works towards achieving the following targets: reduce GHG emissions by 51 per cent by 2030; improve energy efficiency from the 2020 target of 33 per cent to 50 per cent by 2030; update our Climate Action Roadmap annually, within six months of the publication of the Climate Action Plan.

The ESRI complies with the requirements of public sector bodies by reporting annually on its energy efficiency and greenhouse-gas emissions performance to the Sustainable Energy Authority of Ireland (SEAI). The ESRI's performance in 2025 is as follows:

- Greenhouse gas emissions: Fossil CO_2 – 54.2 per cent below the baseline. If fossil CO_2 is maintained at this level for another five years, the 2030 target (42,985 kgCO_2) will be achieved. Total CO_2 was 65.5 per cent below the baseline. To achieve the target, total CO_2 must reduce by another 12.9 per cent from 2025 level within five years.

- Energy Efficiency: By 2025, energy performance had improved by 43.6 per cent since the baseline. To achieve the efficiency target, energy performance must improve by another 6.4 per cent within five years.

In 2025 the ESRI published its updated Climate Action Roadmap (CAR), within the timeframe required per the Mandate. The Roadmap sets out our plans to achieve our decarbonisation and energy efficiency targets and the actions and projects we have undertaken. In addition, the ESRI reported on the implementation of the Climate Action Mandate using the SEAI's Public Sector 'comply and explain' system. The ESRI will continue to report via the SEAI system annually.

The Council recognises its responsibility to continuously improve sustainable practices across the Institute. Given the age and profile of the building's plant and equipment and reduced occupancy as a result of hybrid working, the Council agreed to formally commence the process of disposing of the Institute's building in February 2026. The ESRI commits to incorporating sustainability criteria into its future building and accommodation plans and actions.

The ESRI implements other local projects to promote energy-saving actions, as outlined in our Climate Action Roadmap. A summary of these actions is outlined below.

The Institute follows Environmental Protection Agency (EPA) and Office of Government Procurement (OGP) Green Public Procurement guidelines, using relevant frameworks for sustainable purchasing. In 2025, environmental criteria were included in procurement processes where applicable; IT hardware was bought through HEAnet

Frameworks, utilities and facilities management via OGP agreements, and the updated procurement policy was published. The Institute complies with SI646/2016 by procuring energy-efficient products listed on the Triple E register, other than when replacing old mechanical or electrical parts, due to compatibility issues.

Our environmental impact is reduced through waste reduction, segregation, and recycling initiatives. Food waste is tracked using public sector guidelines. Electrical and electronic equipment waste (WEEE) is recycled; a notable rise in 2025 is due to disposing of accumulated outdated items. The ESRI follows a "digital first" strategy – most reports are digital – and uses recycled printer paper to minimise paper waste. The Institute will add more sustainable practices in future building plans.

The ESRI does not purchase single use non-recyclable items. The Green Team launched a new Deposit Return Scheme initiative which reduces waste via designated bins while supporting various children's charities.

The ESRI supports sustainable travel through its policies. Staff must use public transport when possible, and the ESRI provides Cycle to Work and TaxSaver schemes along with secure bike parking. As a Smarter Travel Partner since Q1 2025, ESRI is committed to promoting active travel initiatives and aims to achieve Smarter Travel Mark certification. The ESRI complies with the requirement to report staff business travel to the SEAI annually. The ESRI is continuing to examine its compliance and alignment to the guidance within Circular 1/2020 and will report progress in the 2026 annual report.

Looking ahead, the ESRI commits to adhering to the requirements of the Climate Action Mandate by prioritising environmental, social, and governance goals, targeting reductions in energy use, waste, and other impacts while maintaining ethical, effective governance.

Protected Disclosures Act

There were no protected disclosures made to the ESRI, or to other relevant bodies in relation to the ESRI, in 2025. The ESRI is committed to upholding the highest standards of transparency, integrity and accountability. We support and comply with the provisions of the Protected Disclosures Act. To ensure compliance with the Act, we have put in place a policy and procedures that outline the process for making protected disclosures, either through designated internal channels or via external channels as prescribed by the legislation. A copy of the ESRI's Annual Protected Disclosure Report is available here: https://www.esri.ie/system/files/publications/PD2025.pdf.

Official Languages Act 2003

The Institute complies with the Official Languages Act 2003 where possible. Such compliance includes 5 per cent of the advertising spend being allocated to Irish language media, 20 per cent of advertising content in Irish and the availability of key corporate reports in both English and Irish. The Institute's Head of Governance and Corporate Resources is the Irish Language Officer.

1.4 PEOPLE

The Council acknowledges the professionalism, expertise and commitment of the Institute's staff, whose work underpins the ESRI's reputation for independent, high quality research. Many researchers across the Institute are recognised nationally and internationally for their expertise and scholarly contribution. Their work is supported by a highly skilled Corporate Resources team.

It was with great sadness that we learned of the passing of two former colleagues in 2025: Professor Dermot McAleese and Professor John Bradley. Dermot McAleese was a member of staff and subsequently of the ESRI Council and served as Chairman from 1988–1991. Dermot firmly believed in the importance of evidence-based decision-making in public policy, and this was the cornerstone of his own research and a principle he championed in his guidance to the Institute. John Bradley's work on building economic models to rigorously analyse the impact of policy interventions was ground-breaking and built a foundation for much subsequent work within the Institute.

Finally, the Council wishes to express its appreciation to government departments and state agencies, Whitaker Patrons and corporate and individual members for their continued support. The engagement of stakeholders across the public, private and non-profit sectors remains essential to sustaining a research agenda that addresses Ireland's evolving economic and social challenges. This supports the Institute in pursuing its vision of being a world-class research institute advancing a more inclusive, prosperous, sustainable and decarbonised Ireland.

Sean O'Driscoll
President and Chairperson

Martina Lawless
Director

2. SUMMARY OF STRATEGIC ACHIEVEMENTS IN 2025

The year 2025 marked the second year of the implementation of the Institute's Research Strategy 2024-2028. The Council oversaw progress on the implementation of the actions described under the overarching goals through quarterly, six-monthly and annual reports to its sub-committees.

The following sections highlight progress made during the year, organised by the overarching goals of Research Excellence, Comprehensive Research Agenda, Effective Communications, Impactful, Ethical Engagement, and actions under Organisational Objectives. It is not exhaustive but is intended to provide a sense of the major areas of activities.

2.1 RESEARCH EXCELLENCE

A primary measure of research excellence is the ability to publish papers in peer-reviewed journals, where the review process is independent of the Institute. In 2025, 62 papers by ESRI researchers were published in such journals.

All ESRI publications undergo robust peer review processes in line with Council-approved Publications and Dissemination Policy.

Staff delivered presentations at national and international conferences, seminars and workshops, with the highest number occurring in 2024 and 2025 compared to previous years.

2.2 COMPREHENSIVE RESEARCH AGENDA

To ensure that our research agenda reflects national priorities, researchers engage with stakeholders through relevant conferences, events, seminars, and formal meetings.

Multi-annual research programmes are designed to focus on and support national research priorities. In 2025, a number of important research programmes were renewed, and a major new research programme was agreed with the Department of Agriculture, Food and Marine, which will examine the provision of animal health and veterinary care services in Ireland. Substantial new research programmes were agreed in the area of Education with the Department of Education, the Department of Children, Disability and Equality and the Department of Culture, Communications and Sport.

To maximise the impact of our research, we engage extensively with government departments through research programme steering committees, and ESRI researchers regularly appear at Oireachtas Committees.

2.3 EFFECTIVE COMMUNICATIONS

With the predominance of social media as a key source of information, the ESRI focused on its high-performing channels such as LinkedIn, and the ESRI website, posting concise overviews of research via short-form video. The communications team focused on developing its multimedia offering, positioning ESRI researchers at the forefront of our messaging. This strategy resulted in significant growth in traffic to its channels in 2025. Positive relationships with journalists resulted in excellent ratio of coverage to press releases issued.

In 2025, efforts focused on European Accessibility Act compliance. Accessibility projects concluded and planning began for staff training in Q1 2026.

2.4 IMPACTFUL, ETHICAL ENGAGEMENT

ESRI researchers continued to play a significant role in informing national policy debate in 2025, presenting research evidence directly to Oireachtas Committees nine times. Through these engagements, researchers contribute independent analysis to inform parliamentary debate and evidence-informed policymaking.

Conferences and events remain a core element of the Institute's engagement with policymakers, funders, researchers, the media and civil society. In 2025, the ESRI hosted 20 conferences, webinars and workshops, providing forums for the presentation and discussion of research findings across a wide range of policy areas.

The ESRI further strengthened its research governance framework in 2025 by becoming a member of the UK Research Integrity Office (UKRIO), reinforcing the Institute's commitment to research integrity, ethical standards and international best practice.

2.5 ORGANISATIONAL OBJECTIVES

During 2025, the ESRI strengthened its governance, systems and operational capacity. Key areas of focus included enhancing financial sustainability, investing in staff capability and wellbeing, enhancing IT and management information systems, and addressing infrastructure and sustainability challenges. These actions support effective, efficient and ethical operations, ensure compliance with public sector requirements, and position the Institute to respond to emerging risks and organisational needs over the remainder of the strategy period.

3. RESEARCH IN 2025

This section provides an overview of our research activities and outputs in 2025 across the 12 research areas. Further details on the research are available on the ESRI website (www.esri.ie).

3.1 BEHAVIOURAL SCIENCE

Research highlights and findings

- Study comparing farmers' views on climate change with those of the rural and urban public.
- Review of evidence surrounding the impact of digital technology on young people and parenting.
- Experimental test demonstrating how inducements increase gambling.

The **Behavioural Research Unit (BRU)** uses controlled laboratory, online and field experiments to investigate decisions and behaviours across multiple policy areas. Most of the BRU's work centres on environmental, health and financial outcomes.

Work commissioned by the **European Climate Foundation**, published in April, challenged the perception that urban and rural dwellers, including farmers, differ in their views of climate change. All these groups are worried about climate change and willing to take action to counter it. While willingness to act is high, the study recorded significant knowledge gaps, with the link between diets and climate change poorly understood.

In June, the BRU published a review of international evidence on digital parenting, funded by the charity **Block W**. While digital technologies can offer benefits for children, some types of social media and gaming can harm wellbeing. Parents face digital risks themselves, including device overuse. The report notes an urgent need for better evidence on the link between social media and mental health and wellbeing.

In July, the BRU published an experimental test of inducements, such as free bets and moneyback guarantees, in the gambling market. The study, funded by the **Gambling Regulatory Authority of Ireland**, found that these offers entice people to bet more, with those at risk of problem gambling especially susceptible.

Also during 2025, the BRU published an experiment funded by the **Health Insurance Authority** showing how a new kind of online comparison helps people to choose more appropriate health insurance. A study for the **Department of the Taoiseach** revisited data collected over many months during the COVID-19 pandemic to identify factors that influenced people's behaviour, drawing lessons on how to organise a national collective response to any future emergency. An experiment funded by the **Environmental Protection Agency** revealed that shoppers buy more sustainable clothing if it carries a scaled label evaluating the environmental impact. A large study supported by the **JP Morgan Chase Foundation** showed how low-income households had to make high-risk changes to their finances to cope with the cost-of-living crisis, including entering arrears, taking on more debt, or eating into savings. An experiment undertaken for the **National Screening Service** demonstrated that showing people a video of a medical scientist discussing uncertainty inherent in screening reduced blame and increased trust in screening.

Research programmes continued for the **Department of Health, National Transport Authority, National Immunisation Office** and **Department of Transport**, with the latest findings due to be published in 2026. New projects with the **Department of Further and Higher Education, Research, Innovation and Science**, the **Sustainable Energy Authority of Ireland** and the **Competition and Consumer Protection Commission** are also expected to produce first results in 2026.

3.2 CLIMATE

The climate research area provides macroeconomic evidence on the impacts of climate change policies on equality, firms, households, carbon dioxide and air pollutant emissions, energy and private transport mode choice.

In 2025, the climate team continued calibrating the new version of their Ireland Environment, Energy and Economy (I3E) model to include a detailed representation of renewable energy, hydrogen, agriculture, food, EV, and heat pump adoption. The team used this model to estimate Ireland's medium-term economic outlook and the energy emission projections provided to the Environmental Protection Agency (EPA).

This work is funded by research programmes with the **Department of Climate, Energy and the Environment** (DCEE), **Department of Finance** (DFIN), **Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation** (DPER), **Environmental Protection Authority** (EPA) and **NexSys**.

Research highlights and findings

- The baseline projection in the ESRI report *Ireland's medium-term economic outlook: Risks and opportunities* is for an annual average economic growth rate of 2.3 per cent in modified gross national income (GNI*) out to 2030 and 2.1 per cent from 2031 to 2035.

- The I3E-Transport model shows that a 2035 phase-out of internal combustion engine vehicles delivers substantial emissions reductions but falls short of sectoral emission reduction targets.

- Increases in the Irish carbon tax and the EU Emission Trading System (ETS) carbon price result in a reduction of CO_2 and non-CO_2 air pollutant emissions (NO_x, SO_x, NH_3, PM2.5, PM10, and NMVOC).

- An international comparison of consumption-based emissions fails to reveal systematic similarities between a selected sample of EU countries in terms of consumption-based emissions.

- An analysis of gross value added and greenhouse-gas emissions for Irish sectors shows a decoupling in the industry sector between Q2 2024 and Q2 2025.

Despite recent international upheavals and substantial domestic challenges, the outlook for the economy appears relatively favourable in the absence of any unforeseen shocks. The report found that three potential external shocks (namely, a slowdown in global trade, a loss of Irish competitiveness internationally, and an exodus of multinational corporations from Ireland) had a negative effect on the Irish economy, but improving the productivity of indigenous firms could help weather that storm. This research was funded by the **Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation** (DPER) through the annual grant-in-aid, and was published in December.

Research has shown that, under current trends, Irish transport emissions remain elevated through mid-century, with carbon taxation delivering only modest reductions, while a comprehensive phase-out of internal combustion engine vehicles from 2035 achieves substantially larger – though still insufficient – emissions savings. This **NexSys**-funded research, published in December, develops the I3E-Transport model, a new passenger transport model for Ireland that integrates behavioural responses, vehicle technology choice, and macroeconomic interactions through linkage with the I3E model. The transport model is used to assess the impacts of transport decarbonisation policies on transport demand, vehicle stock composition, energy use and emissions.

Estimates show that climate policies (the Irish carbon tax and the EU ETS) are effective at reducing air pollutant emissions; however, the extent of this depends on the pollutant, the climate policy and the sector. This is because using fossil fuels emits both CO_2 and other air pollutants; thus, policies that reduce fossil-fuel usage can also reduce air pollutant emissions. The journal article was published in *The Economic and Social Review* in December, and the research was funded by the **Department of Climate, Energy and the Environment**.

An international comparison of consumption-based emissions reveals the diversity across a group of selected countries. Funded by the EPA and published as a working paper in June, the analysis points out that country-specific characteristics may underlie the observed diversity in emissions sources. This is reflected in trade-related emissions as well. Further study is being conducted to examine consumption-based emissions of Ireland through time.

Monitoring of energy use and greenhouse-gas emissions in Ireland in conjunction with economic performance is important to track the transition to a low-carbon economy. The climate team has introduced the monitoring of emissions and energy use into the *Quarterly Economic Commentary* (QEC). The Winter 2025 QEC presents gross value added, energy and emissions for different sectors and provides evidence for a decoupling in the industry sector, indicating efficiency gains. However, limited decoupling has occurred in the transport sector. This work was funded by the **Department of Climate, Energy and the Environment**.

Other research outputs

In June, Kelly de Bruin presented to a closed session of the Oireachtas Joint Committee on Climate, Environment and Energy concerning the economic and equality impacts of climate policies to ensure a low-carbon transition.

In 2025, the researchers in this area provided analytical support in drafting a technical note for the Department of Finance to inform its European-level response to the economic effects of a change in the kerosene tax on aeroplanes carrying fewer than a specified number of people. The researchers continue to engage with policymakers and other stakeholders through the Carbon Budgets Working Group of the Climate Change Advisory Council (CCAC) and the Department of the Taoiseach climate modelling group. The I3E model's baseline was improved through the partnership with DCEE, DFIN and DPER.

3.3 COMPETITIVENESS, TRADE AND FOREIGN DIRECT INVESTMENT

ESRI research in this area focuses primarily on microeconomic factors and structural policies underlying competitiveness and knowledge-based economic growth in Ireland and other European countries, in the context of international economic integration. In 2025, researchers addressed the following overarching themes: foreign direct investment, international trade, technological change, innovation and productivity.

Research on foreign direct investment published in August, part of the **ESSPIN** project funded from the **European Union's Horizon Europe Programme**, found that, over the period 2012–2021, the presence of large multinational firms with dominant market shares (international 'superstar' firms) contributed substantially, over and above other factors, to increased wage inequality between firms across European regions.

Researchers suggested that policy measures aimed at enhancing spillovers from highly innovative and productive multinational firms to domestic firms could foster productivity and wages in domestic firms and thus help to achieve more equal wage distribution. Related research funded by the **Environmental Protection Agency** found that technology spillovers from foreign affiliates in Ireland could enhance the green innovation performance of indigenous firms. Further research results indicated that local firms engaged in R&D activities benefited from such spillovers.

Research published in May, as **part of the EFFEct project funded from the European Union's Horizon Europe Programme,** examined the effectiveness of investment in employees' training on productivity growth in EU countries. The impact of intangible capital accumulation on labour productivity growth was found to be stronger in more training-intensive industries. Research published in October put forward a novel measure of quality-adjusted human capital at industry level across European countries accounting for the quantity and quality of education. Using this measure, research results indicated a positive and statistically significant link with labour productivity growth in goods-producing industries. Research published in December found that firm-level productivity gains from using AI across firms in Ireland varied greatly depending on specific business purpose and AI technology, with large and persistent gains for firms using AI for marketing, business administration and ICT security, and firms using AI technologies that automate workflows or assist in decision-making, such as robotic process automation.

Research published in September on firm productivity distribution, funded by the **Department of Finance**, found that new start-up firms were initially less productive than incumbents. This highlights the challenges facing young firms in their start-up stages, and that policies aiming to boost firm entry may have a lagged effect on productivity. Research published in March on the structure, performance and challenges of the domestic side of the economy found that firms in domestically dominated sectors have been growing steadily but invest and innovate less than firms in the multinational sector and comparator countries. This research highlighted that productivity gaps and potential crowding-out remain issues of policy concern.

Research funded by the **Commission for Communications Regulation (ComReg) and the Department of Environment, Climate and Communications** examined the relationship between firms' access to ultra-fast broadband and productivity between firms, within and across regions in Ireland. Results indicated that while, on average across all firms, access to ultra-fast broadband was associated with productivity gains, the most productive firms benefited more than the other firms, contributing to the widening of intra-regional productivity gaps. This evidence suggested the need for complementary targeted policies such as training programmes and access to innovation networks aimed at strengthening the absorptive capacity of less productive firms to ensure that benefits from digitalisation are more evenly distributed. Another research strand examined the link between firms' digitalisation and the prevalence of ICT-related security incidents across firms in Ireland.

A new research project funded by the **Department for the Economy Northern Ireland**, started in September 2025, is examining the potential effects of changes in US trade policy on Northern Ireland's international trade. The analysis uses a modern multi-country, multi-sector Quantitative International Trade Model, accounting for trade in final goods as well as intermediate inputs and international input-output linkages. This modelling framework captures both the direct effects of tariff changes on trade flows and second-round effects of trade policy changes that propagate through complex inter-country inter-sectoral linkages. Results will be published in 2026.

3.4 EDUCATION

The ESRI Education research area covers all levels of the Irish educational system, including early childhood education, primary, second-level, and further and higher education. Research in 2025 focused on educational disadvantage and post-school pathways among young adults with special educational needs. The work spanned cross-national research and studies focusing on education in Ireland.

Research highlights and findings

- New research shows how children's academic self-concepts, parent expectations, and teacher-student relationship quality shape later educational attainment.

Research as part of **Horizon Europe**, published in September, draws on *Growing Up in Ireland* data to examine why children from economically vulnerable families are persistently less likely to progress to third-level education. These children finish primary school with lower academic self-concepts, and these drop more steeply in secondary school compared with their peers. Parental educational expectations typically rise during this transition, but not for parents of low socio-economic status. Both patterns predict attainment seven years later. In fact, parents' expectations during this period are especially influential for children of low socio-economic status. Positive teacher-student relationships in early secondary school are critical. Even when parents of low socio-economic status do hold high expectations, their children also need positive teacher relationships to reach the same attainment levels (a third-level degree) as their peers of high socio-economic status.

- A review of the School Completion Programme shows its value as a vital support for vulnerable children and young people.

Research for **Tusla Education Support Services (TESS)**, published in March, showed that the strength of the programme lies in the skills of School Completion Programme staff in developing strong and supportive relationships with children and young people, thus enhancing their school engagement. Findings point to the scale of socio-economic disadvantage evident in participating schools, with many staff reporting challenges in reaching enough students, given the level of local need.

- New research shows the importance of appropriate, high-quality post-school pathways for disabled young people.

Research for **the National Council for Special Education (NCSE)**, published in March, tracked the experiences of young people with special educational needs/disabilities from second-level education through the transition into later pathways. Transition preparation at school was generally perceived positively. However, the findings suggest that schools are doing less well in preparing students for adult life, independent living and career decisions. While many special-school leavers successfully progressed to education/training programmes or services, others experienced delayed or disrupted transitions.

Other research

Education researchers are centrally involved in two comparative European studies, the **ESSPIN** and **EFFEct** projects, and one researcher is the Irish National Expert at the **European Commission** Independent Experts on Education and Training. A report presenting policy advice and reflections resulting from a **European Commission**-funded peer counselling process in Poland was published in July.

A new research programme was signed with the **Department of Education and Youth (DEY), Department of Children, Disability and Equality** and **Department of Culture, Communications and Sport**, examining children's and young people's participation in creative and cultural activities. Drawing on existing data and new primary research in a diversity of school and out-of-school settings across the country, the research will examine the experience and impact of creative arts and cultural activities in the lives of young people, and shape the Creative Youth policy post-2027.

A new research programme on school absence began with the **Tusla Education Support Service (TESS)**, using administrative data to document the scale of non-attendance, and using *Growing Up in Ireland* data to look at the drivers of absence and its long-term consequences. Work also began with the ESRI labour market and skills team on an evaluation and monitoring framework for the Delivering Equality of Opportunity in Schools (DEIS) programme for the **Department of Education and Youth**.

In July, research with **Empowering People in Care (EPIC)** highlighted the role of multiple care placements and school changes as barriers to educational engagement for care-experience young people. Research with the **Department of Children, Disability and Equality (DCDE)**, published in August, showed that a significant proportion of young people experience bullying-type behaviour that causes them to feel upset or anger, but do not define it as bullying and so are less likely to tell an adult about it.

The first report of the Teachers' Professional Journeys longitudinal study, funded by the **Department of Education and Youth** and the **Teaching Council**, was published in December.

A number of journal articles covered a diverse range of topics, including digital policies in schools, ICT skills development, student wellbeing, student-teacher relationships, and science subject take-up.

3.5 ENERGY AND ENVIRONMENT

Core funding for energy research at the ESRI comes from the ESRI's Energy Policy Research Centre, whose members comprise the **Commission for Regulation of Utilities**, the **Department of Climate, Energy and Environment (DCEE), EirGrid, Energia, ESB, Gas Networks Ireland, Bord Gáis** and **SSE Ireland**. Additional projects are funded by the **European Commission (EU Horizon), Taighde Éireann/ Research Ireland** (formerly Science Foundation Ireland) and the **Sustainable Energy Authority of Ireland (SEAI)**. Research related to the environment is funded by the **Environmental Protection Agency (EPA)**, while research on electronic communications networks and services is funded by **DCEE** and the **Commission for Communications Regulation (ComReg)**. Research in the area spans topics such as residential energy efficiency, energy poverty, electricity market design, and the interface between the environment and human health.

During 2025, work continued on phase V of the EPA research programme. The current programme has 11 projects, covering issues such as the economics of land-use change, health and climate change, industrial policy and behavioural science. The final report from the phase IV EPA research programme was published in June, and researchers presented findings of EPA-funded research at the Irish Economics Association Annual Conference, the EPA/ESRI/HSE Health and Wellbeing Conference and the EPA National Air Event.

- Irish network tariffs are inefficient. Study identifies the benefits of cost-reflective reform and measures to avoid negative distributional effects.

- A study published in May found that the current structure of Irish network tariffs is inefficient. The implications of a cost-reflective reform were investigated; it was concluded that, while such reform would improve consumer welfare in aggregate, negative distributional consequences might result. The research found that this is not a good reason to avoid reform; these distributional consequences should be addressed as part of social policy measures. The study's timely insights can inform ongoing tariff reviews by the Commission for Regulation of Utilities (CRU). This paper was funded by the **ESRI Energy Policy Research Centre (EPRC)**.

- Research funded by the **EPA**, published in November, found evidence of inequalities in exposure to nitrogen dioxide (NO_2) air pollution across the population. Using data from the EPA and Census of Population, the research found that NO_2 concentrations are highest in areas with greater shares of non-White populations and renters.

- The ESRI's Energy Poverty research programme continued during 2025. Different metrics for energy poverty were applied to Irish datasets and a spatial analysis of energy poverty was conducted for the first time. The results show that metrics based on energy expenditure versus metrics based on households that curtail energy usage yield different results, with no one-size-fits-all metric.

The Energy and Environment team made a number of submissions to inform government decision-making, notably CRU calls for evidence, alongside a submission of evidence to the National Energy Affordability Taskforce.

In June, the team ran the 13th MaREI Climate and Energy Research Seminar, covering topics related to climate policy, residential energy use, and the electricity sector.

In December, John Curtis and Niall Farrell addressed the Oireachtas Joint Committee on Climate, Environment and Energy. Drawing on ESRI research, they analysed the primary policy options to tackle energy affordability: uniform transfers (e.g. energy credits), targeted transfers (e.g. changes to social transfers) and changes to energy prices (e.g. VAT rate changes).

3.6 HEALTH AND QUALITY OF LIFE

In 2025, health and quality-of-life research focused on health service reform and public health. Health service reform included research on projected capacity requirements across the health and social care system. Public health research examined the impact of environmental conditions on health, health and wellbeing in young adults, and sexual violence.

Research highlights and findings

In February, a half-day policy and research conference was held to discuss the findings from a series of research reports from the research programme on Sexual Health and Wellbeing, funded by the **HSE Sexual Health Programme**. This research, which used data from *Growing Up in Ireland,* examined issues of policy relevance in three key domains of sexual health and wellbeing: pornography use, sexual initiation, and sexual health literacy.

In March, Dr Gretta Mohan delivered the Barrington Lecture to the Statistical and Social Inquiry Society of Ireland (SSISI). The paper, 'Who is lonely in the EU's loneliest nation?: A post-pandemic examination of loneliness among the adult population in Ireland', published in the *Journal of the Statistical and Social Inquiry Society of Ireland*, used data from the 2021 and 2023 waves of the Healthy Ireland Survey and found a strong association between having few people to rely on, probable mental health issues, and acute loneliness (feeling lonely often or always).

In December, a half-day event took place to discuss the findings from a series of reports, funded by the **Department of Health**, projecting demand and capacity requirements for a number of health and social care services to 2040. Bringing together academics, policymakers and health professionals, the event examined the challenges in meeting the projected requirements and explored potential policy pathways.

Other research outputs

In 2025, work on the capacity review of the Irish healthcare system was completed, with the six associated reports published throughout the year. Work continued on the research programme on sexual violence funded by **Cuan**, the **Health Research Board (HRB)**-funded project, in collaboration with colleagues from **Trinity College Dublin**, to write a Health Systems in Transition profile for Ireland, the HRB-funded mental health project, the **EPA** research programme and the **HSE** workforce programme.

In 2025, the comprehensive capacity review of the Irish healthcare system was completed and six related ESRI reports were published over the year. Research continued on the **Cuan**-funded programme examining adult sexual violence; on the **Health Research Board (HRB)** project in collaboration with **Trinity College Dublin** colleagues to produce an updated Health Systems in Transition profile for Ireland; on the **HRB**-funded mental health project; on the **EPA** research programme; and on the **HSE** workforce planning programme.

Throughout the year, presentations were made to a wide range of academic conferences, stakeholders and policymakers, including the Irish Economics Association conference, the Annual Health Promotion Conference, the *Growing Up in Ireland* Annual Research Conference, the Society of Actuaries Annual Convention, the Faculty of Public Health Medicine meeting, and the Nursing Homes Ireland Annual Conference.

3.7 HOUSING

Access to and affordability of housing is one of the most critical social and economic issues both in Ireland and across the globe. The ESRI's housing research area focuses on a range of topics to provide evidence to support housing policy decisions. These topics include understanding homeownership rates, measuring housing affordability, analysing the rental sector, supply-side and land market analysis, and social aspects of housing.

In 2025, our overarching research themes included exploring the sustainability of housing markets, understanding rent control policies, improving the monitoring of rental trends, exploring energy efficiency for rented properties, and examining short-term let activity.

- Analysis of rental data shows low property-level inflation rates for private rental tenants who remain in their tenancy, and higher rates for properties with changing tenants.
- Rental monitoring through the ESRI/RTB Rent Index continued in 2025, showing detailed trends in rental prices across Ireland.
- Analysis of cross-country trends in homeownership and how Ireland fares relative to other European countries was undertaken in 2025.
- Research on rent controls found a direct, causal link between rent control measures and property exits by landlords.
- Research highlighted the challenge of understanding short-term let activity and its relationship with the private rental sector.
- Research explored investment requirements for energy efficiency upgrades in the private rental sector.

Research highlights and findings

New research highlights the challenge of understanding short-term let activity and interaction with the rental sector: Concerns over the impacts of short-term lets (STLs) on local communities have led to increased regulation of these platforms across countries in recent years. Research funded by the **Department of Housing, Local Government and Heritage** in 2025 profiled the short-term letting sector in Ireland and its interaction with the private rental sector. The research provided comprehensive insights into the level, and key characteristics, of Airbnb usage across Ireland. This analysis was based on 2023 data provided by InsideAirbnb, in addition to Census 2022 small-area data. A particular focus of the work was to examine the size of Airbnb markets relative to the private rental sector in local areas. The research also highlights the findings of some initial academic studies into the impact that different types of regulation have had on the short-term let sector internationally.

Research explores the investment requirements for the energy efficiency upgrades of rental properties: Supported under the long-standing research programme with the **Department of Housing, Local Government and Heritage**, research published in 2025 aimed to explore the energy efficiency of rental properties, assess the investment costs of potential upgrades and explore the affordability of these investments by small landlords. The research finds the majority of properties are rated either C (52 per cent) or D (30 per cent). The remaining (approx. 45,000 rented properties) have an energy efficiency rating of E1 or below. The costs of upgrading to a B-rating vary substantially but are estimated to be €43,000 on average for G-rated properties and just under €30,000 for C-rated properties, using 2023 prices. The total investment required by property owners to retrofit the rental sector to BER of B1–B2 is estimated to be between €7 billion and €8 billion.

Insights into property-level rental trends highlight different inflation levels across the sector: This research, funded by the **Residential Tenancies Board (RTB)**, provided a detailed analysis of rental price developments at the individual property level. It uses data from the first three years of annual registration data from the RTB. Unlike the RTB/ESRI Rent Index, which reflects growth in the average rent level in the market and is influenced by property churn, this study tracked the same properties over time to capture the household experience of rental inflation. The analysis covers over 375,000 matched property pairs between Q2 2022 and Q1 2025, offering unique insights into how rents for the same unit evolve over time, the degree of price stickiness, turnover effects and differences between Rent Pressure Zones (RPZs) compared to non-RPZ areas. The findings highlighted a moderation in property-level rental inflation during the latest year (Q2 2024–Q1 2025), alongside notable differences between RPZs and non-RPZ areas, and between properties with ongoing tenancies and those with tenant turnover. More academic work focusing on how these trends differ by landlord size was also published.

Supply-side effects of rent controls: Collaborative research between the ESRI, Trinity College Dublin and the National University of Ireland Galway (NUIG) considered the supply-side effects of rent control in Ireland. The research used the introduction of rent stabilisation measures in Ireland after 2016, and their tightening in 2021, to understand the impact of these policies on the supply of rental housing and whether the policies caused properties to exit the sector. Rental activity is measured using both online listings and official tenancy registrations, with further data on room rentals. The research finds evidence of exit from the rental market, specifically after rent controls were tightened in 2021: rent controls are associated with more sale listings and fewer rental listings/registrations. The negative impact of rent controls on room rental listings is, likewise, consistent with market exit rather than simply reduced mobility

Other research outputs

The ESRI produces quarterly rental trend figures in the long-standing ESRI/RTB Rent Index funded by the **Residential Tenancies Board**. This market surveillance is the most authoritative and comprehensive periodic analysis of trends in rental activity produced for the Irish market, leveraging large administrative datasets. As part of the research funded by the **Department of Housing, Local Government and Heritage**, the ESRI undertook research on comparing homeownership rates across the European Union and explored how Ireland fared in a cross-country context. Research on modelling the house price-to-rent ratio explored the role of monetary policy and changing credit conditions.

As part of the **United Nations Economic Commission for Europe (UNECE)** Real Estate Market Advisory Group, the ESRI was involved in a large cross-country study of housing affordability across UNECE member countries that was published in 2025. In terms of external engagements, ESRI housing researchers presented to a range of public and private stakeholders, the Oireachtas Budgetary Oversight Committee, the Oireachtas Committee on Housing, Local Government and Heritage and a range of other public-sector bodies. ESRI research was presented at numerous academic conferences, including events organised by the European Network on Housing Research and the UK Collaborative Centre for Housing Evidence at the University of Glasgow

3.8 LABOUR MARKET AND SKILLS

In 2025, research covered a diverse range of topics, resulting in several newly released or finalised publications, in addition to work commencing in new areas of research. The team launched the second report under a research programme with the **Department**

for Further and Higher Education, Research, Innovation and Science that developed an Evaluation Framework for the National Training Fund. A study, funded by **Pobal**, was also published, examining changes in area-level barriers to social inclusion over time; it found improvements in economic outcomes but widening health inequalities. Papers from the research programme with **Pobal** were published in *Regional Studies, Regional Science* and *The Economic and Social Review*.

Research funded by the **Low Pay Commission** was published examining regional patterns of minimum-wage employment in Ireland, using online job vacancy data. Papers were also published in *Applied Economics*, *Economica* and the *British Journal of Industrial Relations,* based on work funded under the **Low Pay Commission programme**. Also published was a paper funded by the **Department of Finance** examining the incidence and characteristics of green and brown jobs in Ireland. A number of new studies commenced in 2025, including research comparing wellbeing across Gaeltacht and non-Gaeltacht areas funded by **Údarás na Gaeltachta**, an evaluation of the DEIS programme funded by the **Department of Education and Youth**, and an examination of the gender gap in digital skill usage at work, funded by **Block W**.

The team continued to research North-South issues; researchers co-authored reports on differences in living standards and on a synthesis study comparing a range of life opportunities on both sides of the border, funded under the ESRI's joint research programme with the **Shared Island Unit in the Department of the Taoiseach**. Also under this programme, work began on cross-border differences in disability rates. Northern Ireland-specific work is also ongoing, with a first-of-its-kind study of student mobility being funded by the **Northern Ireland Department for the Economy**. The so-called 'Northern Ireland brain drain' is often cited by stakeholders, policymakers and in the media, yet there is no recent evidence on the issue. Two additional Northern Ireland projects were commenced in late 2025, funded by **EPIC FUTURES NI**. These will examine social capital and conflict scarring on employment outcomes in an effort to help tackle the region's economic inactivity.

In 2025, researchers published a number of outputs from two projects, funded by **Horizon Europe**, on the topic of skills mismatches: **TRAILS** and **SkillsPULSE.** These included studies on skill shortages, skill gaps and undereducation. Researchers also published two chapters on various aspects of skill mismatch in the *Handbook of Education and Work* and the *Handbook on Education and the Labour Market*. Team members also had two papers on skill mismatches accepted for a special edition of the *Journal of Education and Work*, and published papers examining the earnings and job satisfaction of Vocational Education and Training (VET) graduates in *Education Economics*, and regional youth employment in *Journal of Youth Studies*.

Highlights

- Our study on skill shortages developed a new methodology that enables the measurement of potential skill shortages over time and across countries. There is a lack of clarity and consistency on how skill shortages are defined and measured. In this study, using data from the 2021 European Skills and Jobs Survey combined with Lightcast job vacancy data, we attempted to bridge this methodological gap. We estimated that approximately 2 per cent of job vacancies in the European Union are likely to experience skill shortages. The methodological approach developed in the paper has been adopted by Cedefop, the European Centre for the Development of Vocational Training, as the explicit basis for its new TalentGap Index.

- Our study of the National Training Fund (NTF) sought to systematically assess the extent to which all initiatives funded under the NTF can be evaluated using counterfactual impact evaluation (CIE) and, where CIE is not feasible, the most suitable methodologies based on project structure and objectives. The NTF has played a strong role in funding workforce development initiatives in Ireland over the past 25 years and is expected to have funding of €1.485 billion available over the six-year period between 2025 and 2030. Ensuring that NTF initiatives can be properly evaluated is a matter of national interest.

3.9 MACROECONOMICS

Macroeconomic research in 2025 continues to examine the drivers of Ireland's economic performance, focusing on both short-term fluctuations and long-term structural challenges. Core areas include assessing medium-term growth prospects, understanding the implications of demographic changes, and analysing risks to the economy from both domestic and global developments. This work underpins policy analysis by providing evidence on economic resilience, labour market trends, and fiscal dynamics.

Research highlights and findings

Structural macroeconomic model for Northern Ireland. In 2025, a new structural macroeconomic model was developed in partnership with NIESR and funded by **Ibec** to support medium-term projections and policy analysis on an all-island basis. The model captures interactions between households, firms, government, and the foreign sector, linking Northern Ireland formally to both the Irish and the wider UK economy. Early simulations indicate that Northern Ireland's output responds differently to monetary and fiscal shocks than the rest of the UK, and that growth spillovers from Ireland can generate positive effects.

Tariffs and protectionist trade policy impacts on Ireland. A March 2025 working paper examined how rising protectionism, including tariff and non-tariff barriers, could affect Ireland's highly open economy. Using the ESRI's structural model of the Irish economy, COSMO, the research finds that both unilateral and bilateral tariff scenarios could reduce GDP and domestic demand by several percentage points relative to a no-tariff baseline over the next 5–7 years, with the traded sector particularly exposed due to its global integration. Higher tariffs could also weaken employment and tax receipts, placing added pressure on public finances. This research garnered international media coverage.

Quarterly commentary highlights Ireland's ongoing strong performance but with rising global risks. The *Quarterly Economic Commentaries* published throughout 2025 highlighted Ireland's strong economic performance, with robust consumption and exports. However, key themes throughout the year were a moderation in employment growth and ongoing capacity constraints in housing and infrastructure. Also highlighted was Ireland's vulnerability to international developments – in particular, risks related to corporation tax receipts and multinational activity.

New shared-island economic survey launched. In December 2025, the first ESRI annual economic survey of Ireland and Northern Ireland was launched in partnership with the Shared Island Unit. The survey, which reported growth in employment and output across both jurisdictions, provides a new platform for comparative economic analysis.

Implications of demographics and investment for Ireland's future growth potential. In January 2025, ESRI presented long-run projections for the Irish economy using a Solow growth framework, combining a baseline scenario with alternatives reflecting higher investment rates and different migration paths. The analysis highlights strong recent growth driven by population and labour force expansion, but identifies emerging constraints from declining investment rates and demographic ageing, underscoring the importance of sustained capital formation to support medium-term growth.

Irish medium-term economic outlook emphasises risk and opportunity. In December 2025, ESRI published a medium-term economic outlook outlining baseline projections to 2035 and scenarios for potential external shocks such as global slowdown, loss of competitiveness, and downsizing by multinationals. The report underscores both opportunities for continued growth and vulnerabilities tied to global conditions and domestic policy settings.

Other research outputs

Throughout 2025, researchers presented findings at a range of national and international forums, including Oireachtas committee hearings, policy roundtables and academic conferences. Research programme collaborations continued and expanded with the **Department of Finance, Ibec, the Shared Island Unit, and the Department of Enterprise, Trade and Employment**. In addition, the macroeconomics team produce a monthly nowcast of Modified Domestic Demand (MDD) which uses real-time indicators to estimate economic activity before the official CSO numbers are available.

3.10 MIGRATION, INTEGRATION AND DEMOGRAPHY

Research in this area focuses on the integration of migrants, as well as migration trends and policy. In 2025, ESRI research examined how the foreign-born population is faring across a range of integration indicators, as well as community-level factors affecting attitudes to immigration. The European Migration Network looked at the geographical distribution of protection applicant accommodation, among a range of topics.

In January 2025, the Department of Justice, Home Affairs and Migration (DJHAM) joined the ESRI Research Programme on Integration, Migration and Equality (RIME). The Irish National Contact Point of the European Migration Network (EMN Ireland) is located in the ESRI, with a subunit in the DJHAM. EMN Ireland is funded by the **European Commission** and the **DJHAM**.

Research highlights and findings

Many indicators remained strong in the 2024 *Monitoring Report on Integration*, such as higher education and employment rates among migrants, but migrants were more likely to experience poverty and high housing costs.

- Research showed that living in more disadvantaged communities made people more likely to hold negative attitudes towards immigration; in particular, where there was a recent increase in migrants.
- EMN research found that most countries experience challenges in engaging with local communities when opening international protection accommodation centres, and outlined criteria for distributing centres and applicants among regions.
- An EMN/OECD study found that the majority of member countries have one or more migration strategies in place, while 11 have both an overarching strategy and one or more sectoral strategies.

The 2024 *Monitoring Report on Integration*, the ninth in the series, was published in March 2025. It found that migrants are more likely to be employed, active in the labour market, and third level-educated compared to the Irish-born population. However, migrants are more likely to experience poverty and deprivation. Of those born outside the EU, 20 per cent are considered 'at risk of poverty', compared to 11 per cent of Irish-born residents. Migrants are also much more likely to be affected by high housing costs: 37 per cent of migrants spend more than 30 per cent of their income on housing, compared to 9 per cent of Irish-born residents. This report was funded under the **ESRI/Department of Justice, Home Affairs and Migration Research Programme**.

A Research Bulletin published in July 2025 summarises research showing that the share of migrants in a community and recent increases in migrants (between 2011 and 2022) were not associated with attitudes towards immigration in Ireland overall. However, living in a more disadvantaged community was linked with more negative attitudes towards immigration, in particular in disadvantaged communities where there had been an increase in migrants since 2011.

In September, EMN published a study on the distribution of international protection accommodation centres and management of relationships with local communities. This study was led by EMN Ireland. Fourteen EMN member countries and Serbia distribute applicants according to criteria such as regional demographics, infrastructure, proximity to services, and individuals' needs (e.g. health conditions, family status, vulnerability). Just five countries have formal communication plans to support the opening of new accommodation centres. However, most do engage with local authorities and elected representatives, while 16 also engage directly with local communities, before or upon opening new centres.

In March 2025, EMN published a study on the different approaches taken to the design, implementation, monitoring and evaluation of migration strategies in EMN/OECD countries. This study was led by EMN Ireland. It found that in most cases an overarching migration strategy is in place, covering at least three policy fields (e.g. asylum, labour migration, return). A single government department usually leads on strategy development, with working groups formed with other departments and relevant stakeholders. Challenges were reported in the design of strategies related to inter-governmental and stakeholder coordination, as well as the involvement of migrant groups. The Department of Justice, Home Affairs and Migration is currently drafting Ireland's first overarching migration and integration strategy.

Other research outputs

In January and December 2025, EMN Ireland published its 2023 and 2024 annual reviews of migration and asylum-related developments. The latest report showed a continued reduction in arrivals from Ukraine, and a decrease in first residence permits issued to non-EEA arrivals, while the number of employment permits issued increased by 27 per cent in 2024. The lack of accommodation for asylum applicants worsened in 2024, with almost 6,000 applicants not housed on arrival during the year. Vulnerability assessments, paused due to capacity challenges, were partially resumed following the sourcing of an external provider in 2024.

Under the Research Programme on Integration, Migration and Equality (RIME), work progressed on a wide range of projects. Among these, researchers investigated, through behavioural research, the role of misperceptions in attitudes to immigration; the spatial distribution and local-level integration of migrants in Ireland; and experiences of the Irish Refugee Protection Programme. The results of an experiment on labour market discrimination against Travellers were presented to the Department of Children, Disability and Equality (DCDE) and Pavee Point in October. Several related publications will follow in 2026.

The EMN Ireland Migration Memos series continued to provide short accessible summaries of EMN EU-level information and ESRI research. Three were published in 2025, covering financial contributions to international protection accommodation, civic training and migration strategies.

3.11 SOCIAL INCLUSION AND EQUALITY

Research on social inclusion and equality explores the conditions that shape people's access to the material and social resources needed to engage fully in economic and social life, as well as the mechanisms that produce unequal opportunities and outcomes. In 2025, researchers examined a wide range of issues, including poverty and social exclusion, parental and child-related leave, the financial impact of disability, the role of school experiences in girls' wellbeing, childhood and adolescent bullying and gender balance in the financial sector.

Research highlights and findings

In January, a collaborative study with the **Shared Island Unit in the Department of the Taoiseach** compared child poverty and related policies in Ireland and Northern Ireland. It found that, despite similar positions in the income distribution, low income families in Ireland were less able to translate household income into an adequate standard of living, likely due to higher living costs. In both jurisdictions, children in lone parent households, larger families, and households with a disabled member experienced much higher poverty risks, while joblessness was an even stronger risk factor for child poverty in Ireland than in Northern Ireland.

A report published in April by the **Irish Human Rights and Equality Commission** examined the use of child-related leave in Ireland and its implications for gender equality. It found that Ireland's persistent gender income gap, driven largely by lower female labour market participation and higher rates of part time work, emerges around the birth of a child and continues throughout women's lives. While the introduction of Paternity Leave and Parent's Leave was a positive development, uptake remained low. The report highlighted that child-related leave can help reduce gender gaps by protecting mothers' employment and encouraging fathers' involvement in care, but financial constraints, gender norms, and workplace factors continues to limit take-up.

Research published in June, in partnership with the **Department of Children, Disability and Equality**, used *Growing Up in Ireland* data to profile fathers who do not live full time with their children. The study showed that 14 per cent of children aged nine months to five years and 18 per cent by age nine did not reside full time with their fathers. Despite this, many fathers remained actively involved. Mothers reported that half of non-resident fathers saw their babies or toddlers several times a week. From the child's perspective, relationships with the fathers were generally positive, with just over half of nine year olds saying they got on 'very well', highlighting the importance of their father in their lives.

A September ESRI report, produced in partnership with **Community Foundation Ireland**, highlighted ongoing challenges in poverty and living standards. It found that one-in-five children (over 225,000) lived in families below the poverty line once housing costs are included, placing Ireland 16th out of 27 EU countries on this measure. As well, after adjustment for inflation and household size, real household incomes declined. Average household incomes fell by 0.6 per cent in 2023 and were 3.3 per cent lower than in 2021, as an 11.3 per cent rise in nominal income was outpaced by a 14.6 per cent increase in prices.

Other research outputs

In April 2025, ESRI researchers Anne Devlin and Selina McCoy addressed the Northern Ireland Assembly's Education Committee. They presented evidence on educational disadvantage in Ireland. Drawing on the *Growing Up in Ireland* study and recent ESRI projects, they highlighted key inequalities in student outcomes and then discussed comparative research examining differences between the education systems in Ireland and Northern Ireland.

On 18 June 2025, ESRI researchers Karina Doorley, Bertrand Maître and Simona Sándorová addressed the Oireachtas Joint Committee on Social Protection, Rural and Community Development. On 16 October, Karina Doorley and Helen Russell addressed the Oireachtas Joint Committee on Children and Equality. At both events, drawing on recent ESRI work, they outlined key evidence on child poverty in Ireland, including how it is measured, the role of social welfare supports, and the potential impact of policy reforms proposed by the ESRI.

3.12 TAX, WELFARE AND PENSIONS

This research area examines the design of the tax, welfare and pensions system, with a focus on the effect it has on redistribution, poverty, inequality and incentives to work. Much of this work uses SWITCH, the ESRI tax and benefit model, to simulate the impact of reforms on households. Many of the outputs mentioned below are part of the Tax, Welfare and Pensions work programme, supported by funding from the **Departments of Social Protection; Health; Children, Disability and Equality; and Finance**, as well as through the grant-in aid provided by the **Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation**.

Research highlights and findings

- The financial cost of disability was estimated to be around one-half of the disposable income of households with disabled members.
- Without child-related benefits, child poverty rates would be considerably higher: the child 'at risk of poverty' (AROP) rate would increase from 13.9 per cent to 27 per cent, the child material deprivation rate from 19.5 per cent to 23.3 per cent and the child consistent poverty rate from 5.6 per cent to 13.6 per cent.
- Measures announced as part of Budget 2026 will result in small income losses next year, averaging 2 per cent of household disposable income compared to a budget indexed to forecast income growth.

At the annual Budget Perspectives conference in June, organised by the Tax, Welfare and Pensions team for nearly three decades, a report on the effect of child-related benefits on child poverty and deprivation was launched. It found that in-cash child-related benefits reduce the child AROP rate by 10 percentage points, while in-kind child-related benefits reduce the child AROP rate by 1.5 percentage points. A second tier of child benefit was found to be the most cost-effective way of further reducing child poverty.

Two other pieces of research were presented at this conference. The first examined the Medical Card coverage and the impact of non-indexation of Medical Card income limits. The second examined the empirical relationship between redistribution and growth, finding that redistribution increases economic growth in the short term.

In October, the team held their annual post-Budget briefing. This work showed that measures announced as part of Budget 2026 will result in small income losses on average next year, compared to a budget indexed to forecast income growth. The withdrawal of temporary cost-of-living measures results in relatively large income losses for low-income households, while the freeze to tax credits and bands exacerbates income losses for high-income households. This work was published in more detail as a special article in the ESRI's *Quarterly Economic Commentary* in December.

The team also published a variety of articles throughout the year in peer-reviewed journals. These related to the measurement of poverty and inequality; the political economy of in-kind versus in-cash redistribution; social trust and depression among immigrants; and the effect of childcare subsidies on labour supply. Other research published during the year covered the topics of disability and its monetary cost, and tax individualisation.

The work of the Tax, Welfare and Pensions team maintained its strong policy focus. The SWITCH model continued to be used in a range of government departments, to feed into policy decisions. Members of the team gave evidence to the Budgetary Oversight Committee, the Joint Committee on Children and Equality, and the Committees on Social Protection, Rural and Community Development, and Disability Matters. They also delivered presentations at important national and international policy-relevant events organised by the Irish Economic Association, the Irish Society for Women in Economics, Ibec, the International Microsimulation Association, the Luxembourg Income Study and the European Commission.

4. RESEARCH AREA COORDINATORS AT 31 DECEMBER 2025

Research Area	Coordinator(s)
Behavioural Science:	Professor Pete Lunn
Climate:	Professor Kelly de Bruin
Competitiveness, Trade and FDI:	Professor Iulia Siedschlag
Education:	Professor Selina McCoy and Professor Emer Smyth
Energy and Environment:	Professor Niall Farrell, Dr Muireann Lynch and Professor Anne Nolan
Health and Quality of Life:	Professor Sheelah Connolly and Professor Anne Nolan
Housing:	Professor Conor O’Toole
Labour Markets and Skills:	Professor Seamus McGuinness
Macroeconomics:	Professor Adele Bergin, Professor Conor O’Toole
Migration, Integration and Demography:	Professor Frances McGinnity and Dr Emma Quinn
Social Inclusion and Equality:	Professor Frances McGinnity and Bertrand Maître
Taxation, Welfare and Pensions:	Professor Karina Doorley and Professor Claire Keane

5. STAFF AT 31 DECEMBER 2025

Directorate

Martina Lawless*

** appointed ESRI Director in April 2025; Alan Barrett stepped down as ESRI Director on 31 May 2025 on the conclusion of his term as Director.*

Economic Analysis

Delia Agostinelli

City Ahmed

Marta Alvaro-Taus

Conor Banahan

Alan Barrett

Adele Bergin

Luke Brosnan

Philip Carthy

Daniel Cassidy

John Curtis (Head of Division)

Kelly de Bruin

Çağaçan Değer

Seraphim Dempsey

Simachew Dessalew

Kate Devane

Anne Devlin

Luke Doyle

Juan Duran Vanegas

Paul Egan

Andrés Estevez

Kirsten Everett

Niall Farrell

Elish Kelly

Lorcan Kelly

Janez Kren

Clement Kweku Kyei

Muireann Lynch

Samuel McArdle

Seamus McGuinness

Kieran McQuinn

Aykut Mert Yakut

Gretta Mohan

Rafael Nunes Teixeira

Conor O'Toole

Donal O'Shea

Paul Redmond

Diane Sheehy

Iulia Siedschlag

Rachel Slaymaker

Efthymios Smyrniotis

Elisa Staffa

Miguel Angel Tovar Reaños

Chi Tran

Shiwani Varal

Anita Vollmer

Brendan Wade

Adele Whelan

Social Research

Maryam Afzal

Anousheh Alamir

Shahd Almodallal

Maxime Bercholz

Aoife Brick

Daniel Capistrano de Oliveira

Evan Carron-Kee

Sheelah Connolly

Ciára Dalton

Merike Darmody

Karina Doorley

Sean Feeney

Celine Fox

Michele Gubello

Ada Sophia Hahn

Theano Kakoulidou

Claire Keane

Aislin Lavin

Maria Lee

Pete Lunn

Bertrand Maître

Lucie Martin

Selina McCoy

Frances McGinnity

Ellen McHugh

Anna Moya Ponce

Cian Mowlds

Keire Murphy

Anne Nolan

Richard O'Shea

Emma Quinn

Deirdre Robertson

Helen Russell (Head of Division)

Siddhant Seth

Adam Joachim Shier

Agathe Simon

Eva Slevin

Emer Smyth

Shane Timmons

Dora Tuda

Brendan Walsh

Iris Wohnsiedler

Francis Wolfe

Corporate Resources

Eleanor Bannerton (Head of Strategic Planning, Communications and Operations)

Amanda Brennan (Head of Finance)

Claire Buckley (Head of Human Resources)

Sarah Burns

Bernice Clancy

Liz Coyle

Louise Creagh

Lliana D'Emidio

Julianne Flynn

David Gorman (Acting Head of IT)

Ellie Halloran

Adrienne Jinks

Ross Kelleher

Francis McEvoy

Ella Mozal

Josh Nevin

Hugh Nolan (Head of Governance and Corporate Resources)

Clare O'Neill (Head of IT)

Fiona O'Sullivan

Fiona Owens

Fionnuala Quinn

Stephen Sammon

Polina Savchenko

LeAnnie Wilson

6. ESRI COUNCIL – BIOGRAPHICAL INFORMATION

Sean O'Driscoll, President and Chairperson, ESRI

Mr Sean O'Driscoll was appointed President and Chairperson of the ESRI on 27 May 2020. He joined the Council of the ESRI in February 2017. He is the current Chair of the Governing Authority of University College Cork, a former Chair and Chief Executive of the Glen Dimplex Group, a former Partner in KPMG, and a member of the Trilateral Commission and of the National Accelerating Infrastructure Taskforce. He is a former Director of Allied Irish Banks, of the National Competitiveness Council of Ireland and of a number of other government-appointed advisory groups. Mr O'Driscoll is the recipient of an OBE and a Légion d'Honneur Award.

Martina Lawless, Director, ESRI

Professor Martina Lawless joined the ESRI in 2014 and was appointed Director in June 2025, at which point she joined the Council. She was previously Research Professor at the Institute, with a research focus on firm-level dynamics, covering a range of topics such as job turnover, exporting, wage setting and foreign direct investment. Previously, she worked as a research economist at the Central Bank of Ireland for ten years and has a doctorate from Trinity College Dublin. She was formerly a member of the Irish Fiscal Advisory Council and in 2023-2024 was a seconded economic specialist in the Strategic Economic Development Division of the Department of Finance.

Shay Cody, former General Secretary, Fórsa

Mr Shay Cody joined the Council of the ESRI in February 2023. He was General Secretary of Fórsa, one of Ireland's largest trade unions. He served on the Executive Committee of the Irish Congress of Trade Union's Executive and also on its General Purposes Committee. As Chair of the ICTU Public Services Committee he was the lead negotiator in several rounds of public service talks. He has served as a member of the National Economic and Social Council and the National Competitiveness Council and was also a member of the Board of the Workplace Relations Commission. He is currently a member of the Central Bank Commission and is Chair of the Central Bank's Audit and Risk Committee.

Katy Hayward, Professor of Political Sociology, Queen's University Belfast

Professor Katy Hayward joined the Council of the ESRI in September 2021. She holds a Chair in the School of Social Sciences, Education and Social Work at Queen's University Belfast, where she is also a Fellow in the Senator George J. Mitchell Institute and Co-Director of the Centre for International Borders Research. She is a Member of the Royal Irish Academy and a Fellow of the Academy of Social Sciences.

Thia Hennessy, University College Cork

Professor Thia Hennessy joined the Council of the ESRI in February 2023. She is Head of School, Head of the Department of Food Business and Development and Chair of Agri-Food Economics at Cork University Business School. She is also a board member of the Irish Management Institute and Teagasc. Her research interests include the sustainable development of the agri-food sector with a particular interest in the impact of public policy on the farm sector. Prior to joining UCC in September 2016, she was employed by Teagasc, where she managed the agricultural and environmental economic research programme.

Brigid Laffan, Emeritus Professor, European University Institute

Professor Brigid Laffan joined the Council of the ESRI in February 2023. She is Emeritus Professor at the European University Institute. She was Director and Professor at the Robert Schuman Centre for Advanced Studies and Director of the Global Governance Programme and the European Governance and Politics Programme at the European University Institute (EUI), Florence until her retirement in August 2021. Previously, she was Professor of European Politics at the School of Politics and International Relations (SPIRe), University College Dublin (UCD), and Vice-President of UCD and Principal of the College of Human Sciences from 2004 to 2011. She is current the Chancellor of the University of Limerick.

Gabriel Makhlouf, Governor, Central Bank of Ireland

Gabriel Makhlouf joined the Council of the ESRI in May 2020. He is Governor of the Central Bank of Ireland, chairs the Central Bank Commission, is a member of the Governing Council of the European Central Bank and of the European Systemic Risk Board, and is Ireland's Alternate Governor at the International Monetary Fund. Before joining the Central Bank of Ireland, he was Secretary to the New Zealand Treasury and the government's Chief Economic and Financial Adviser. In addition, he was New Zealand's Alternate Governor at the World Bank, Asian Infrastructure Investment Bank, Asian Development Bank, and European Bank for Reconstruction and Development. He was also co-chair of the Trans-Tasman Banking Council. Previously, he worked in the UK civil service where his roles ranged from policy on domestic and international tax issues to large-scale operational delivery. He has also chaired the OECD's Committee on Fiscal Affairs and was responsible for the UK's Government Banking Service.

Sandra McNally, Professor of Economics, University of Surrey

Professor Sandra McNally joined the Council of the ESRI in September 2021. She is a Professor of Economics at the University of Surrey and Director of the Centre for Vocational Education Research at the London School of Economics.

David Moloney, Secretary General, Department of Public Expenditure, Infrastructure, Public Service Reform and Digitalisation

David Moloney joined the Council of the ESRI in November 2010. He is the Secretary General of the Department of Public Expenditure, NDP Delivery and Reform. Prior to this, he was head of the Labour Market and Enterprise Division of the Department, with responsibility for various expenditure areas, including Social Protection, Housing, Enterprise and Agriculture, and for the Irish Government Economic and Evaluation Service (IGEES). Over the course of his career in the Civil Service, David has also served in the Department of the Taoiseach, the Department of Finance and the Department of Health.

Ciarán Ó hÓgartaigh, Former President, University of Galway

Professor Ciarán Ó hÓgartaigh joined the Council of the ESRI in September 2021. He served as the 13th President of University of Galway from 2018 to 2024. Previously, he was Professor of Accounting and Dean of Business at UCD. He is an experienced board member in both the private and public sector. A Chartered Accountant, having trained with Arthur Andersen and with a PhD in Accounting from the University of Leeds, he chairs the Institute’s Audit and Risk Committee and previously chaired the Audit Committee at, for example, the Department of Communications, Marine and Natural Resources and at Avolon, one of the largest aircraft leasing companies in the world.

Anne O’Leary, Head of Meta Ireland, Vice-President Small Medium Business Group, EMEA

Anne O’Leary joined the Council of the ESRI in 2022. She is currently on the board of Meta Platforms Ireland Ltd, WhatsApp Ireland and Greencore, a FTSE 250 food company. She was previously CEO of Vodafone Ireland, President of Ibec, and President of the Dublin Chamber of Commerce, and is a former Chair of GOAL Global.

Anne Vaughan, former Deputy Secretary General of the Department of Social Protection and current Chair of the National Statistics Board

Anne Vaughan joined the Council of the ESRI in September 2024. She is a non-executive director of a number of charitable bodies and a board member of Taighde Éireann – Research Ireland. She is a former Deputy Secretary of the Department of Social Protection and a former Chairperson of the National Statistics Board. She was a member of the Commission on Taxation and Welfare (2022) and the Commission on Pensions (2021). During her civil service career she also worked in the Department of Finance and in the Department of the Taoiseach.

7. WHITAKER PATRONS AND CORPORATE MEMBERS

The Institute's Patronage/Membership programme continues to grow, supporting high-quality research addressing key issues relevant to Ireland. Membership income provides a revenue stream which funds potential 'blue sky thinking' research, along with Corporate Social Responsibility programmes such as the North East Inner-City Initiative. Patron and members gatherings took place throughout the year, attended by high-profile industry and government leaders, reflecting the high esteem in which the Institute is held across Irish society.

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Competition and Consumer Protection Commission (CCPC)
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Department of the Taoiseach
Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media
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