MARCH 2006 Policy Brief

OECD
ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

Economic Survey of Ireland, 2006

Summary

Ireland has continued its exemplary economic performance, attaining some of the highest growth rates in the OECD. After a remarkable decade, per-capita income has caught up with and overtaken the EU average. Further progress will require strong productivity growth and continued increases in labour supply. These challenges are familiar to most OECD economies. But it also faces some issues that are less common: it is going through a transition phase in upgrading its social services; infrastructure levels need to catch up with the boom in activity and population that has occurred over this period; and it has to manage some sizeable macroeconomic risks.

Maintaining high rates of productivity growth. As Irish activity comes to rely less on foreign firms and more on home-grown services, productivity gains will become harder to achieve. The main areas where policy could make a difference in sustaining productivity growth are:

- Boost competition. There are too many sectors where producers are shielded from competition, raising prices and stifling growth. Reforms are needed in the electricity and telecom sectors, and unnecessary restraints in services such as law, pharmacies and the pub trade should be removed. In the retail sector, the government's decision to abolish the Groceries Order is welcome.
- Improve education. Funding is still an issue in universities. One option is to re-introduce tuition fees, but backed by an income-contingent loan scheme. In secondary schools, the key challenge is to target resources on students who are struggling.
- Encourage innovation. The science framework needs to improve before public spending is increased further. The many funding agencies could be amalgamated or better co-ordinated; public support could shift towards market-driven measures; and resources should not be spread too thinly.

This Policy Brief presents the assessment and recommendations of the 2006 OECD Economic Survey of Ireland. The Economic and Development Review Committee, which is made up of the 30 member countries and the European Commission, reviewed this Survey. The starting point for the Survey is a draft prepared by the Economics Department which is then modified following the Committee's discussions, and issued under the responsibility of the Committee.

Observer oecd

- Upgrade infrastructure. Rigorous cost-benefit analysis of infrastructure projects, including those in the ten-year transport plan, should play a greater role in decision-making than has been the case in the past. Moreover, an increasing number of projects should be financed by users.

Boosting labour supply. An important option for boosting labour supply is to raise female participation. Expanding day-care for infants and out-of-school care for children will help. From the point of view of labour market participation, childcare supports such as the new Early Childcare Supplement should be linked to employment status or made conditional on actually using formal childcare. A mutual-obligations approach for sole parents would help reduce child poverty by assisting parents to get a foothold in the labour market. As regards older people, work incentives in the public-pension and welfare systems could be improved. Migrants will also continue to play an important role in alleviating labour supply bottlenecks. The attractiveness of Ireland for immigrants will be influenced by the overall price level (including house prices) and the quality of public services.

Macroeconomic risks are high. As one of the OECD's more open economies, Ireland is particularly exposed to external risks. But it also faces domestic risks. House prices may have overshot fundamentals to some extent, although this does not imply that they will fall significantly; and house-building will eventually ease. A soft landing is the most likely scenario but a sharper fall cannot be ruled out. Hence, the government needs to leave plenty of breathing space by balancing the budget or running a surplus, curtailing tax breaks and pushing ahead with public management reforms to get better value for money from public expenditure. ■

What are the main challenges?

The Irish economy continues to perform well. Growth remains strong, foreign investment is still coming in, industry has shrugged off global shocks and house prices keep on climbing. The question is: for how long will this continue? The economy doubled in size in the 1990s, achieving the fastest growth in the OECD over that period. It also achieved the highest growth rate in the first half of the 2000s despite being hit by the worldwide slump in the information and communication technology (ICT) sector. This resilience reflects strong economic fundamentals, including a business-friendly regulatory environment, a flexible labour market, moderate tax rates and sound fiscal policy. It has also helped that a construction boom has taken over from manufacturing in driving activity.

While incomes have caught up with the European average, there is still room for further progress. To maintain a dynamic economy, Ireland faces challenges that are common to many OECD countries:

- First, productivity growth will need to remain high since this is the primary determinant of living standards in the long term. The country's remarkable productivity performance will become harder to sustain as activity shifts towards more labour-intensive services. Boosting competition will be important for meeting the productivity challenge, as will improving the education system and strengthening the research framework.
- Second, there is room to increase labour supply further. The main avenues here are to continue to attract immigrants – especially the highly skilled – and to facilitate the participation of women and older workers.

There are also some issues that are more specific to the Irish situation. The country's infrastructure has come under severe pressure due to the extraordinary growth in population and economic activity. Bottlenecks have emerged that are imposing costs and may be acting as a brake on growth. The country is also going through a transition period during which it is upgrading many of its social services. The choices made here can affect other policy objectives in positive and negative ways. For example, better childcare and healthcare facilities would make Ireland more attractive for migrants with families. However, poorly designed and overly expensive welfare policies can reduce labour supply and drive up tax rates over time. Policymakers also face macroeconomic risks. As one of the OECD's more open economies, Ireland is especially vulnerable to external shocks. But it also faces domestic risks. The most obvious of these concerns the housing market, but there is also a more general danger of the overall wage and price level overshooting its equilibrium level. Exports, foreign investment and immigration would all be harmed if Ireland priced itself out of the market. In this context, pursuing a prudent fiscal policy, strengthening the medium-term fiscal framework, enhancing competition and containing wage pressures via the centralised wage-bargaining framework will all be important. ■

How can competition be enhanced?

Exposing the sheltered sectors of the economy to more vigorous competition is an important part of the challenge to boost productivity. It would also help reduce inflationary pressures, ensuring that exports remain competitive. Ireland has a legacy of policies that favour the interests of producers over consumers. But it has a golden opportunity to push ahead with regulatory reform while the transition costs are low. Unlike many other countries, the labour market is flexible and jobs are easy to find. Adjustment costs from regulatory reform should therefore be manageable.

Some of the network industries in particular need to be reformed. Insufficient competition is raising prices, creating bottlenecks and holding back growth:

- Despite six years trying to liberalise the electricity industry, competition has not increased by much. As a result of insufficient investment, there is a risk that demand will outstrip capacity in coming years, pushing prices even higher. The main problem is the dominance of the state-owned Electricity Supply Board (ESB). It owns the transmission grid and dominates generation. The transmission and production sides of ESB should be separated and the government should consider splitting the generation side into competing producers as well. Plans to upgrade inter-connection capacity with Northern Ireland and the mainland United Kingdom are welcome. This would have several benefits: greater security of supply, less need to build new generation plants, less dominance by ESB and the chance to diversify away from fossil fuels.
- The main problem in the telecoms sector is the slow take-up of broadband. This may be caused by insufficient competition. Eircom, the telephone incumbent, dominates the market and is dragging its feet in opening up the local loop. The regulator should fast-track this process..
- Entry restrictions are blocking competition in the bus market. This worsens the traffic bottlenecks because other forms of public transport are under-developed. The government is considering several options such as making the regulator independent, allowing private companies to compete with the incumbent on inter-city routes and letting private firms operate up to 15% of new routes in Dublin. It should go ahead with all of these, and go further by opening up all Dublin routes. Experience in other countries shows that this can be done without undermining public service obligations.

In some other sectors, regulations that have been designed for specific purposes are having side-effects that make consumers worse off:

- Inadequate retail competition pushes up consumer prices. The main culprit has been the Groceries Order which bans the sale of non-perishable grocery items below their invoiced price. The government's plan to abolish the Groceries Order is welcome, especially as current competition law is strong enough to deal with predatory pricing. In addition, the retail planning guide should be made more flexible to free up entry and allow bigger stores; currently, it sets up entry barriers that favour small shops over large ones, at the expense of consumers. Restrictions to market entry in the pub trade should also be removed.

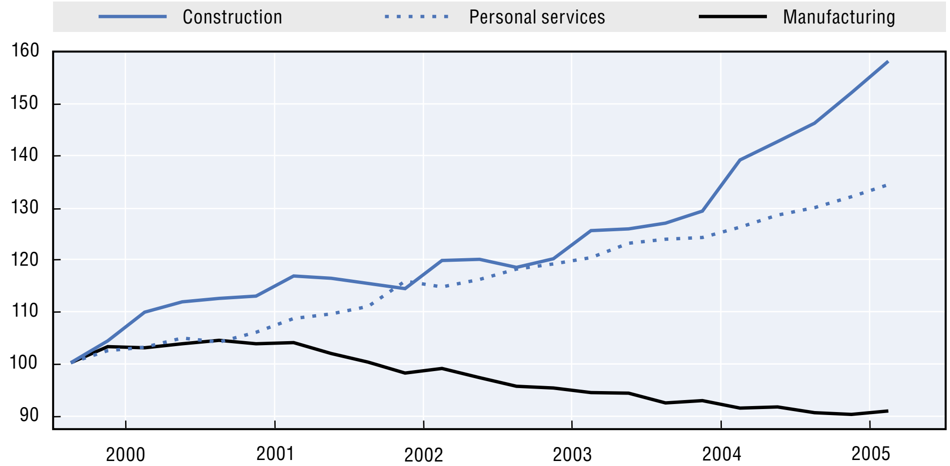
- There are several barriers to competition in the pharmacy industry. The worst is the restriction on foreign-trained pharmacists. Even Irish citizens who train abroad are not permitted to open or run a new pharmacy – the best they can do is buy one that has been operating for three years. This does nothing to promote healthcare; it is purely an anti-competitive restriction that protects incumbents. The government's proposal to remove this restriction should be implemented swiftly. However, liberalising the industry is more complicated than just lifting entry restrictions because the (regulated and negotiated) retail margin on pharmaceuticals is too high. The margin has to be lowered – or completely deregulated – before the gates are opened to new entrants.
- Unnecessary restrictions in the licensed trades, including legal, medical, dental and veterinarian professions, should be removed. These include controls on entry, fee competition, advertising, demarcation, training, recognition of foreign qualifications and organisational structure. As a general rule, licence holders should not be compensated by government when entry is liberalised.

On top of the sector-specific concerns, there is an issue with the broader competition framework. While competition law meets international standards on paper, it is hard to enforce in practice. The Competition Authority cannot impose fines and sanctions and offenders must be prosecuted under criminal law, which is difficult because the burden of proof is high and the legal system is slow and expensive. There may be constitutional constraints to giving the Competition Authority more powers, and a review of competition law is needed to examine the legal issues involved. The staffing of the Authority should be reviewed regularly to ensure it has adequate resources for enforcement actions. ■

Figure 1.

CONSTRUCTION AND SERVICES ARE OUTPACING MANUFACTURING

Employment, 2000Q1 = 100[1]



1. Personal services covers public administration and defense, education, health and other services.

Source: Central Statistics Office.

What needs to be done in the education sector?

Maintaining high rates of productivity growth will also entail continued efforts to upgrade skills. Reforms at all levels of the education system are needed. At the earliest stages, pre-school attendance is low while classes are large and of short duration. International experience shows that integrated systems, which combine pre-primary education and crèche-based day-care, have higher quality for children and provide greater parent satisfaction. Priority should therefore be given to reducing class sizes, extending sessions and creating seamless pre-school and day-care facilities at the same location.

In secondary schools, too many youngsters are leaving without upper-secondary qualifications. They are doing so not because of a hot job market – their employment performance is worse than their counterparts in other OECD countries – but because of inadequate help for students who are struggling. There is a shortage of remedial or catch-up classes and the special programmes that are available focus on children from disadvantaged backgrounds rather than those who are having learning difficulties. Overall, Irish 15 year-olds are good at reading but only average in maths and science. Recent changes to primary school curricula should help in this respect. ■

Would tuition fees help?

Funding is an issue in the tertiary sector. This makes it harder to undertake research, attract staff from abroad and retain graduate students. It may also worsen human capital bottlenecks. Foreign investment could dry up if it becomes hard to find skilled staff. With a tight budget constraint and the need to spend more at earlier stages in the education pathway, there is a strong argument for additional funding to come from tertiary students themselves. Undergraduate tuition fees were abolished in 1995 in an attempt to improve equality of access across social groups, but it has not achieved its goal. One option is to re-introduce tuition fees but back them with an income-contingent loan scheme, similar to the successful systems in the United Kingdom, Australia and New Zealand. Apart from bringing much-needed resources, experience in other countries suggests it could make it easier for students from disadvantaged backgrounds to gain access, would make higher education institutions more innovative and responsive to the needs of students and would boost efficiency by encouraging students to choose useful courses and not waste time. This approach would differ from the pre-1995 system as fees would not be paid up front but would be repaid later only if the person's income is above a certain threshold. If the government is unwilling to do this, it will have to find the required funding from other areas of the budget.

The final step on the learning pathway is the re-training of adults. A distinctive feature of Ireland's skill set is the difference in educational attainment between the young and the old. Around three-quarters of those aged 25-34 have attained an upper secondary qualification, compared with just 38% of those over 55. People at work can be locked out of further education by financing constraints and because the supply of part-time courses is not responsive enough. But in general, public funding should be limited to the most vulnerable groups, leaving others to pay for their own job training. ■

How can the economy become more innovative?

The functioning of the innovation environment is vital for Ireland's future development. As part of the EU's Lisbon Strategy, the Irish government has set a target of lifting economy-wide research and development (R&D) spending to 2.5% of gross national product (GNP) by 2013. This is ambitious. R&D spending by the business sector is low, and two-thirds of this is performed by foreign multinationals; consequently, the R&D intensity of Irish-owned firms is among the lowest in the OECD. In addition, after years of neglect universities have only recently had the resources to carry out high-quality research.

While public funding for research increased sharply in the National Development Plan for 2000 06, it has not kept pace with the growth of the economy. Before providing more money, however, the government needs to improve the science framework. The better the framework, the more chance it has of encouraging foreign firms to shift some of their research activities onto Irish soil. To ensure that R&D is more commercially focussed, public support for business R&D could be rebalanced away from direct grants and towards market-driven measures. The plethora of funding agencies poses risks for the efficiency and coherence of the system, so the structure of the system should be reviewed regularly. Co-ordination among the granting agencies will have to improve and in particular infrastructure spending should be more closely tied to the other funding streams. Research in universities is probably under-funded, making it harder to attract top international talent, even though the 2006 Budget foresees increased funding for doctoral programmes. It is also important that resources should not be spread too thinly. The government may not be able to afford the luxury of having research centres in all regions; it may be better to concentrate resources on a few world-class centres of excellence. Finally, competition can be a major spur to innovation in the business sector: thus, the pro-competition reforms that were discussed above could have the added bonus of boosting innovation as well.

Soaring activity and a rapidly growing population have created an infrastructure deficit that is constraining productivity growth. Major pressure is evident especially in the areas of transport, electricity transmission, landfill, waste water treatment and broadband internet. Insufficient investment in environmental infrastructure has led to pollution and soaring prices for some services such as landfill. The government has responded with a substantial infrastructure programme: public investment is expected to average 5% of national income for the next decade.

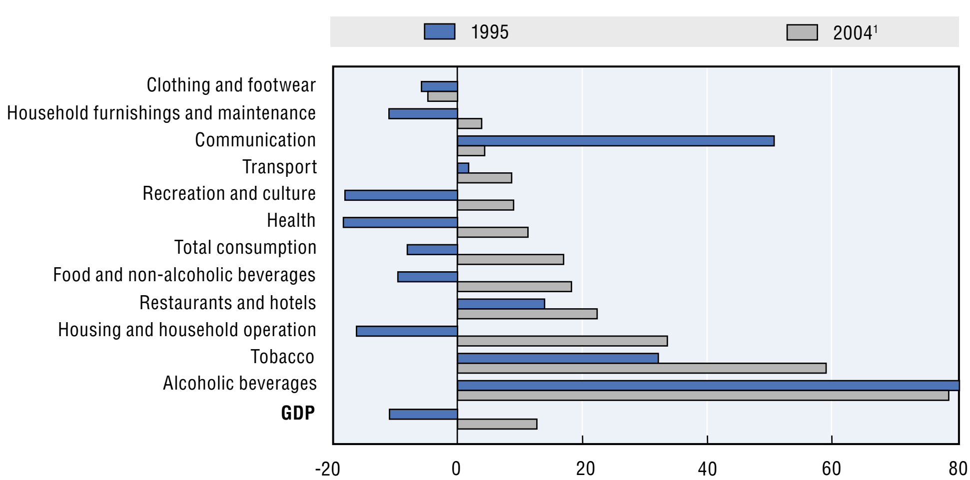
Rigorous cost-benefit analysis of infrastructure projects, including those in the ten-year transport plan, should play a greater role in decision-making than has been the case in the past. From now on, the marginal benefits of new projects are likely to become smaller and will need to be traded off against the other demands on the public purse. The Capital Appraisal Guidelines require a cost benefit analysis for projects above € 30 million and this requirement should be rigorously enforced. They allow exceptions in cases where benefits are "too difficult" to quantify; this exemption should be used to a minimum. It would also be worth creating a central oversight and appraisal unit, taking on board the lessons other countries have learned from their public-private partnership programmes. Delays in the planning system should be reduced. Finally, many of the projects should be financed by users. The success with waste management charges could be extended to areas such as water treatment and road pricing. Indeed, Dublin would be an ideal candidate for an inner-city congestion charge once the public transport network has been upgraded.

The search for productivity improvements should also extend to the public sector. While Ireland is modernising its civil service, it needs to move faster to catch up with best practice. One requirement is to shift the focus of the budget and public management towards outputs instead of inputs and the government has announced that individual ministers will publish an annual statement on departmental outputs and objectives from 2007, while also reporting outturns from 2008. Hiring and promotion practices need to be modernised by moving to fully competitive and merit-based promotion and giving department managers greater freedom to recruit their own staff. Increasing demands on the public purse mean that the evaluation programme and value-for-money assessments will need to be improved. The expenditure review programme has had little success so far, with little impact on budget decisions. Recent changes to the process should improve things, however. The government has decided to phase out several property-related tax reliefs and to cap the overall amount of tax reliefs granted to an individual. Remaining tax reliefs should remain under scrutiny and be removed unless they can be shown to be worthwhile. ■

Figure 2.

PRICES ARE HIGH

Price difference between Ireland and EU15, per cent



1. Provisional data.

Source: Eurostat database, January 2006.

How can female participation rates be increased?

Ireland's labour supply is unusually elastic because it has been able to draw on its large diaspora community and it is one of three EU15 countries to have opened its doors to the new EU members. Since 2000, these two sources have added around 1% to the working-age population each year. This has been supplemented by a substantial increase in labour force participation by women. Despite this increase, female participation rates remain below the OECD average for all except the under-thirties. Cultural attitudes and low educational attainment among older women are factors, but policy settings play a role as well. The current tax-benefit system was appropriate when its main aim was to reduce poverty but reforms are needed to give all parents a good chance to engage in paid work if they prefer to do so:

- Child support is paid whether the parents are working or not. In order to help families, the 2006 Budget introduced a new cash transfer for families with young children. Similar to the existing Child Benefit, the Early Childcare Supplement is paid universally regardless of parents' labour force status and regardless of whether they are purchasing childcare services or not. This is an extremely expensive solution that involves considerable deadweight costs, but was chosen to reflect public preferences for not discriminating against mothers at home. From a labour supply point of view, it would be more effective if over time childcare supports such as the Early Childcare Supplement became linked to employment status or to the use of formal childcare. It is important to realise that this approach would not discriminate against mothers at home but rather eliminates the bias against mothers at work that is built into the current system. The Home Carer's Tax Credit should be phased out as it is a direct subsidy to staying at home.
- Out-of-school-hours care is almost non-existent and is one reason why the employment rate of mothers with children is especially low. The 2006 Budget announced measures to create 5 000 places in after-school care by 2010. Labour supply could be increased by encouraging school boards to make their facilities available for after-school care.
- A mixed strategy of demand and supply-side measures is needed to expand childcare capacity. Ultimately, policy should focus on the demand side of the market through measures to make childcare more affordable for parents. By providing funding directly to parents (tied to the use of childcare), they will be better able to choose public or private facilities that best match the needs of their family. But these measures would need to be phased in to allow time for supply to expand in order to avoid inflationary pressures. In its latest Budget, the government is supporting the creation of 50 000 extra childcare places by 2010. Plans to increase the number of training places for childcare workers are welcome and should be implemented swiftly.
- The income tax system contains elements of individual and joint taxation. Therefore, even though they have been reduced significantly over recent years, marginal tax rates on second earners are higher than need be. This may explain why a relatively small number of second earners work full

time. The government should consider moving to individual taxation to make the system simpler and more neutral.

Ireland has a large number of sole parents and their employment rate is low. This reduces labour supply, but more importantly it contributes to child poverty: nearly half of children in non-working single-parent families live in consistent poverty. International experience shows that the most effective way to reduce child poverty is for the parent to be working. Ireland should move away from passive income support and instead move to a mutual obligations approach to assist and encourage single-parent mothers to find a foothold in the labour market, at least once their children have reached a certain age. Options include reducing the phase-out rate of the One Parent Family Benefit (because it creates a low-activity trap) and allowing parents who return to work to keep some of their other benefits such as the rent supplement and free medical care (perhaps for a limited time). As part of this package, job-search requirements should be increased for sole parents whose children are at school. Of course, most of this would have to wait until job support, childcare and out-of-school-hours care programmes are expanded. ■

What is the right stance for fiscal policy?

The fiscal position is healthy. The government savings rate (current revenue less current expenditure) is one of the highest in the OECD (being around 4% of GDP last year). After taking account of the high rate of public investment due to the infrastructure programme, the overall government accounts showed an estimated surplus of ½ per cent of national income in 2005. Gross debt is low (33% of GNP in 2005), long-term ageing-related spending pressures may be less severe than in many other countries and assets are being accumulated in a pension reserve fund. However, the government has budgeted for a deficit of ¾ per cent of GNP in 2006 through 2008, thus providing some untimely fiscal stimulus to activity. And some sizeable long-term social expenditure commitments are being locked in at what could be the peak of a revenue cycle. Moreover, there are some large downside risks to fiscal policy. ■

What could happen in the housing market?

The key domestic risk is the housing market. In the past decade, house prices have risen faster than in any other OECD country: average prices have roughly tripled in real terms. Most of this increase is justified by the economic and demographic driving forces such as surging incomes, a rising population and changing living habits, with an additional fillip from low interest rates, but prices may have overshot to some extent. However, this does not imply that they will fall significantly: the housing market is not symmetric, and during a downswing people prefer to take their house off the market rather than sell at a loss. Thus, the most likely scenario is that prices will level out or decline slightly, housing construction will fall back gradually, turnover will decline and the market will remain subdued for some time. But even in such a scenario, government receipts would weaken sharply, so that a substantial structural budget deterioration would come on top of any cyclical weakening.

While this is the most likely outcome, there are alternative scenarios on the upside and downside that could have significant macro-economic implications. The first is that the housing boom may not run out of steam of its own accord, leading to serious overvaluation and imbalances throughout the economy. The eventual fall-out in this scenario could be severe. With monetary policy now set by the European Central Bank, taxation is the main policy lever left to influence the housing market. Ireland's tax system is significantly more favourable to housing than in most other OECD countries. To avoid the chances of this scenario unfolding, the government should avoid any tax changes that make housing more attractive; indeed, the tax bias should be phased out over time. Aside from not fuelling the housing market, there are efficiency and equity reasons for reducing the tax advantages. A property tax could be introduced to help fund local infrastructure. This would also redistribute some of the windfall gains that accrue to people living close to new roads and public transport links and shift the cost for local services such as water and sewerage facilities so that businesses and households each pay their fair share. While this makes economic sense, in an Irish context where over 80% of the population own their own homes, it is currently seen as a non-starter. The second scenario is that house prices fall sharply, either because they are more overvalued than they appear or because a negative shock hits the economy. The impact on activity and the budget could be large.

Even if house prices level out, there are macroeconomic and fiscal risks from a decline in residential construction, which currently accounts for 9% of GNP. The rate of house building will need to fall substantially to return to sustainable levels. Most forecasters predict that this adjustment will be gradual. A sharper decline would put a serious dent in the growth rate though it would be unlikely to lead to an outright recession. Overall, the forces that will drive activity in the medium term – immigration, productivity, female participation, foreign investment, house prices – are so powerful and difficult to predict that the outcome for growth could be substantially different from the central forecast. For all these reasons, a prudent approach to fiscal policy would be to leave sufficient room for manoeuvre – *i.e.* to plan for the worst but hope for the best. In practice, this means returning to balance or running a small surplus.

Ireland has elements of a medium-term fiscal framework, especially with its rolling five-year capital expenditure envelope and its ten-year transport plan. Although the budget process has some top-down aspects, they need to be given more prominence relative to the bottom-up negotiation process. Ireland should take advantage of its current strong growth phase to strengthen the fiscal framework in order to prepare for negative fiscal shocks and to deal with them if they were to occur. Moving to a fully-fledged top-down budgeting process would help expenditure planning and control while a medium-term fiscal framework, as is in place for the multi-year capital envelopes, would give greater stability to policy and planning for other spending areas and would reduce the chances of repeating the sort of pro-cyclical spending that occurred earlier this decade. ■

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