



Ireland: A Brief Overview

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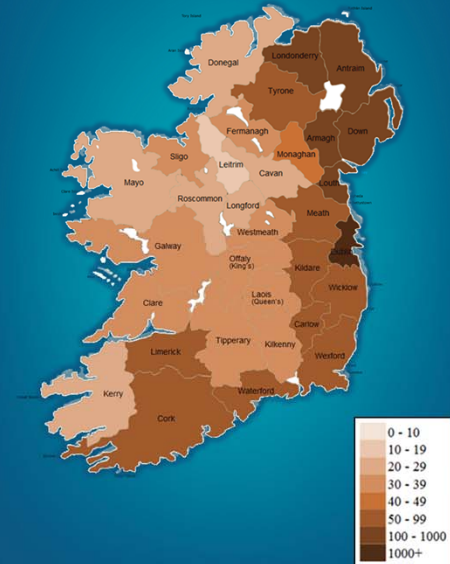
- To put Ireland in a US context:
- Ireland is an island about the size of West Virginia
- With about two and a half times the population



Key demographic characteristics

Population 4.5 million

Density Highest on east coast



Source: Central Statistics Office. (2012, March). This is Ireland. Highlights from Census 2011, Part 1. Cork, Ireland: The Stationery Office.

- In fact, the population is about that of Atlanta, Georgia.
- With the highest concentrations on the east coast of the island.
- We've traveled to Galway and seen the farmland between here and there—
- But the island is truly rural in its western counties.



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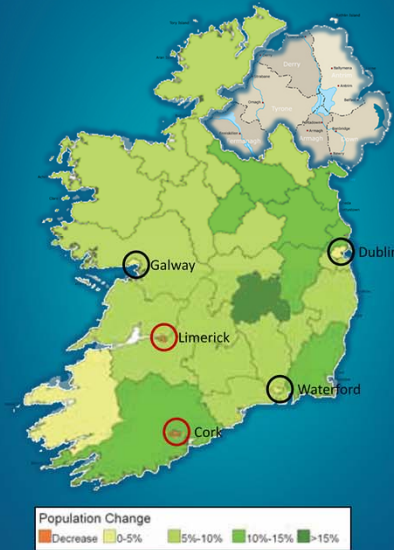
Density Highest on east coast

Growth since '06 + 8.2% (+ 1.6%/year)

Prior five years + 2.1%/year

Shrinking Cork, Limerick

Growing Galway, Waterford, Dublin



Source: Central Statistics Office. (2012, March). This is Ireland. Highlights from Census 2011, Part 1. Cork, Ireland: The Stationery Office.

- Still, Ireland's population is growing—it has grown 8.2% since 2006 and before that it was growing even faster.
- The port cities and more industrial-based cities of Cork and Limerick are shrinking, actually
- While the more technology-driven cities of Galway, Waterford, and Dublin are growing.
- And the commuter areas around Dublin are among the fastest to grow.



Population trends

Population 4.5 million

Density Highest on east coast

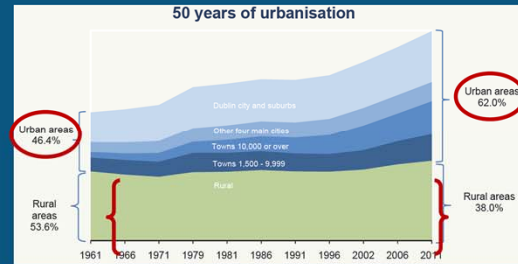
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Urbanization Highest rate in OECD



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- Fastest rate of urbanization in the OECD



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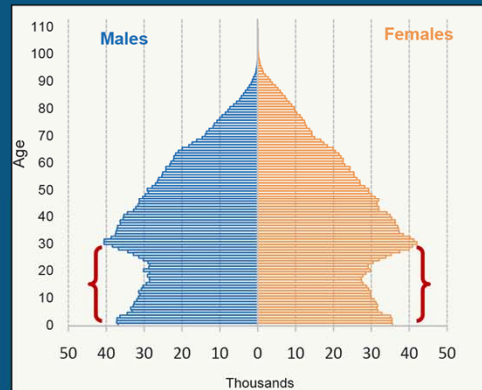
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Age distribution More in 30s & 40s
than teens & 20s

Religion 84% Roman Catholic, 5.9% "No religion"



Source: Central Statistics Office. (2012, March). This is Ireland. Highlights from Census 2011, Part 1. Cork, Ireland: The Stationery Office.

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- Due to a population bust about 30 years ago on account of high emigration in the 80's,
- We see more people in their 30s and 40s in Ireland than in their teens and 20s.
- But the population is growing again, and this has implications for Irish higher education.
- Ireland is predominantly Catholic, of course, but less so since the scandals.



Ethnicity & Immigration Trends

Ethnicity	2006	2011	% growth
White Irish	87.4%	84.5%	5%
Irish Travelers	0.5%	0.7%	32%
Other White	6.9%	9.1%	43%
Black	1.1%	1.4%	47%
Asian	1.3%	1.9%	62%
Other/ Unknown	2.8%	2.5%	-7%
TOTAL	4.17 mil	4.53 mil	9%

Growth in non-Irish nationalities:

Polish +94% (63.3K to 122.6K)

Romanians +125% (7.7K to 17.3K)

Indians +101% (8.5K to 17.0K)

Lithuanian +40% (24.6K to 36.7K)

Latvians +43% (13.3K to 20.6K)

By comparison:

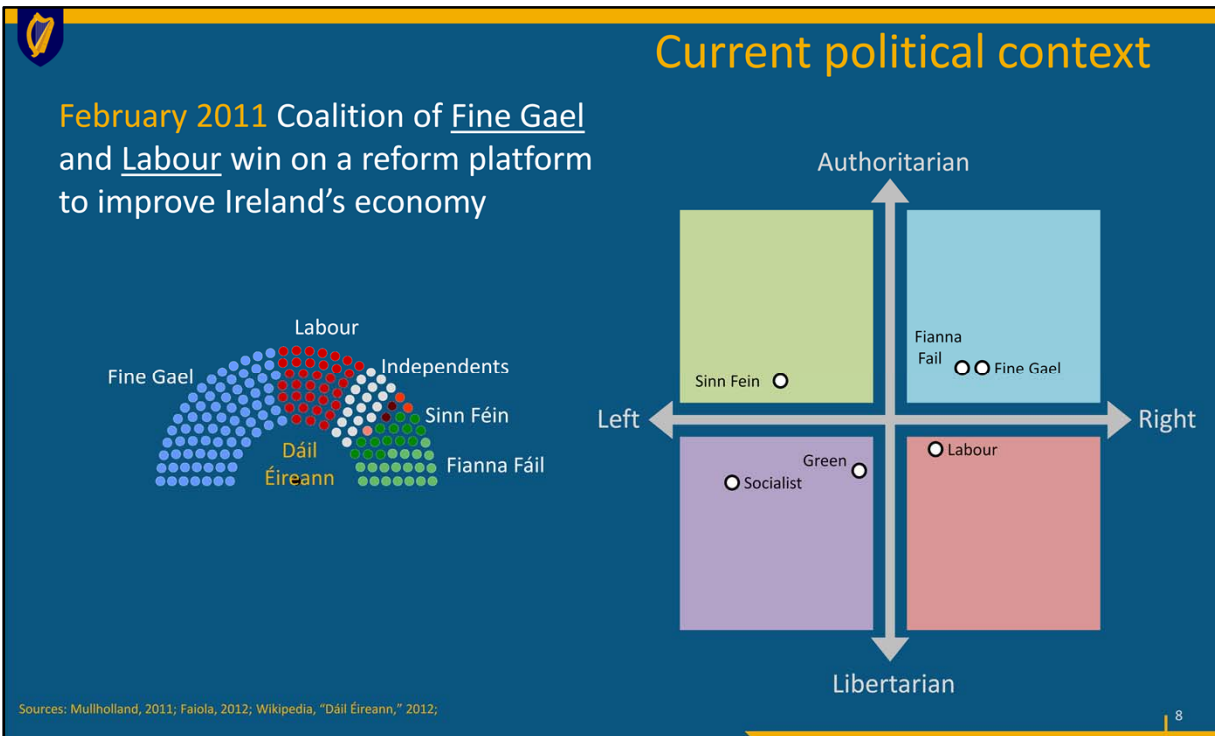
UK -0.3% (112.5K to 112.3K)

Source: Central Statistics Office. (2012, March). This is Ireland. Highlights from Census 2011, Part 1. Cork, Ireland: The Stationery Office.

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- Population since the 70s has pretty much been a monoculture.
- But recently, the ethnic and national make-up of the country has been shifting.
- So the numbers have been increasing overall
- But White Irish are a smaller share of Ireland's population than they once were.
- By comparison, "Other white" residents have grown in numbers by 43%, and Asians by 62%
- Who are these fast growing populations?

- The numbers of Poles, Romanians and Indians on the island have doubled in five years.
- In fact, the Polish now outnumber the British on this island.
- These population trends will show up later as we turn to higher education.



- We won't spend much time on the political context
- But just know that last year, a coalition government formed between Fine Gael and Labour
- This, the Dail Eirann, is the most important legislative body in the Government
- This matrix gives you a sense of where the parties fall on the spectrum
- But keep in mind that from a US context, all of these parties are left of center.
- The key point we take away from this is to inquire what sort of consensus a coalition government can get around policies affecting higher education.



Economic characteristics

Celtic Tiger (1995-2007)

9.5% avg. annual GDP growth (1995-2000)

5.5% avg. annual GDP growth (2001-2007)

After the Celtic Tiger (2008-)

- 32% largest deficit as % of GDP in world (2010)

47% avg. decline in house prices (2007-2012)

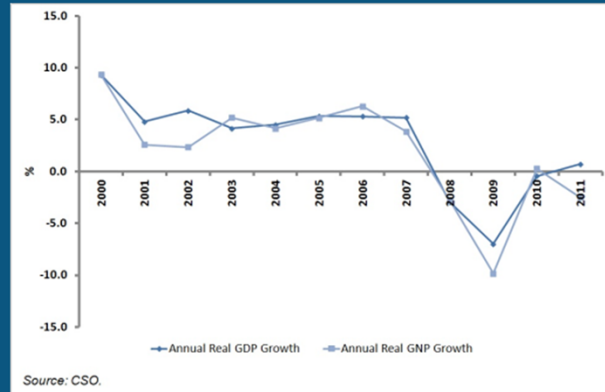
Current situation: Austerity

June 2012 Irish vote for austerity (50% turnout; 60% approve)

Opposition concern Irish sovereignty

Quarterly reviews EU-ECB-IMF "troika"

June 29, 2012 Deal to restructure bailout, good news for Ireland in 2013?



Source: International Monetary Fund, 2012; CIA, 2012; CSO, 2012; OECD, 2012.

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Economic context:

- The Irish economy rebounded, and then some, from its struggles in the 80s and early 90s.
- The rates of annual GDP growth were brisk, to put it mildly
- We've learned that the first half of this period was sound growth, but a housing bubble fueled the latter years.
- So the worldwide financial crisis hit

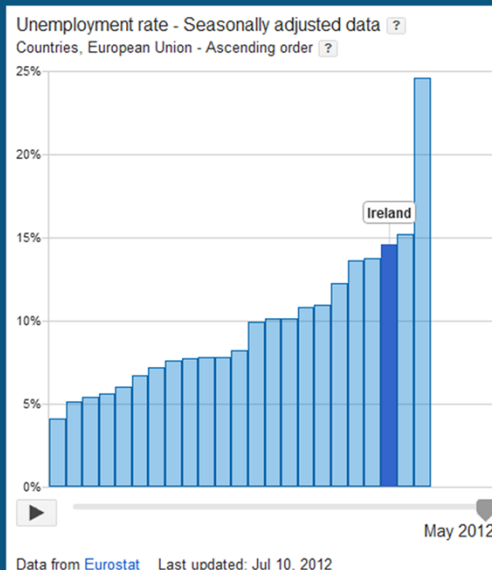
- And the Celtic Tiger was no more
- In 2010, Ireland had the largest deficit as a % of GDP in the world
- It's now at 13% of GDP, but credit some of that improvement to the shrinking of Ireland's GDP in the denominator

- So now Ireland has voted for austerity measures reviewed quarterly by the "troika" of the EC, ECB, and IMF
- The stated objectives of the measures are:
 - sustainable growth
 - sound public finances
 - and job creation
 - While still protecting poor & most vulnerable
- And just a few weeks ago Ireland persuaded Angela Merkel to relent and consider restructuring the nation's sovereign debt, so there is hope for 2013

- Cab drivers and others

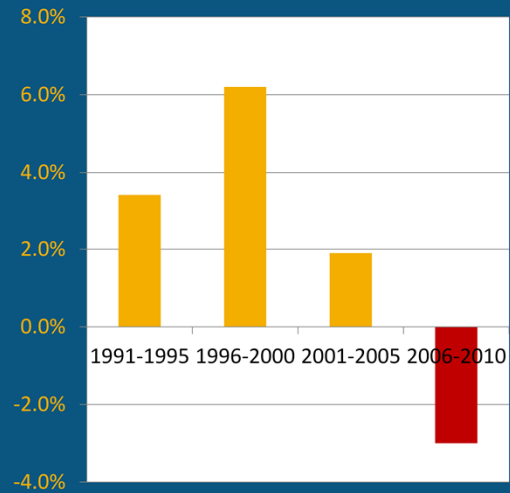


Impact of financial collapse on the people



Source: Eurostat, retrieved via Google Public Data 15 July 2012.

Change in Real Gross National Income Per Capita (avg. % annual change as % of GDP)

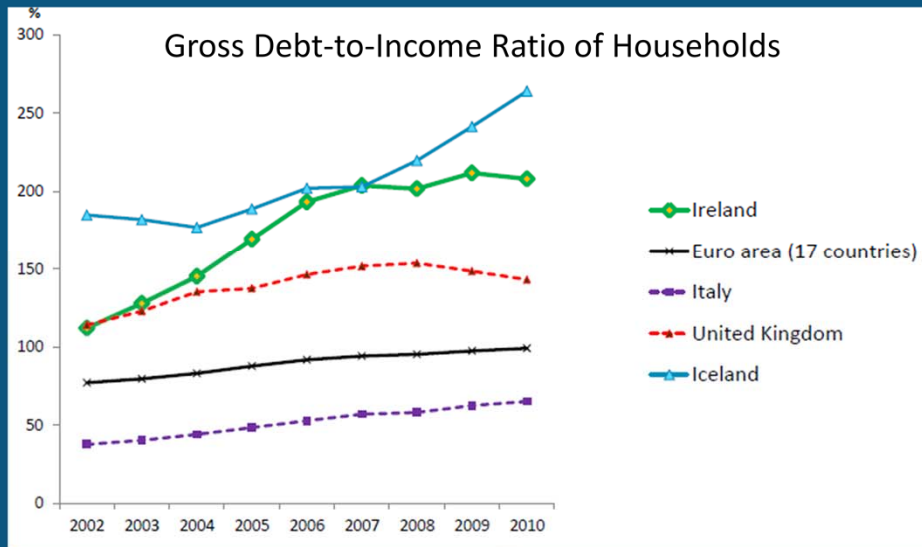


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- 14.7% unemployment in 2012.
- Back in 2007, it was just 4.5%--the lowest in the EU, in fact.
- And the Irish are earning less.
- Their incomes, as a % of GDP, have fallen at an astonishing rate.



Impact of financial collapse on the people



Source: Eurostat, retrieved via Google Public Data 15 July 2012.

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- And even while the Celtic Tiger still roared, their debt burdens were rising rapidly.
- Like in the US, where we were overleveraging ourselves.
- The same has happened here.



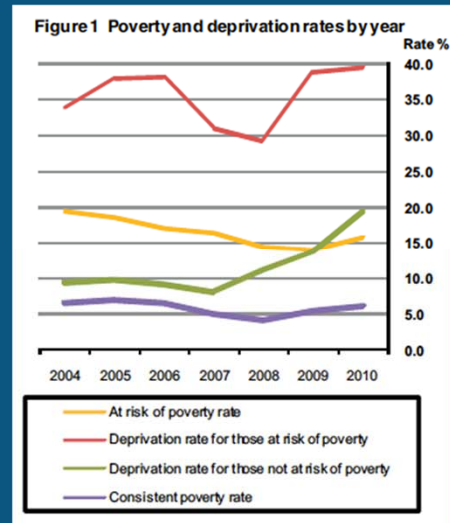
Poverty and “Deprivation” are rising

Result: Increasing income inequality ('09-'10)

Consistent and at-risk poverty rates rising

Deprivation rates:

struggle to afford some living needs



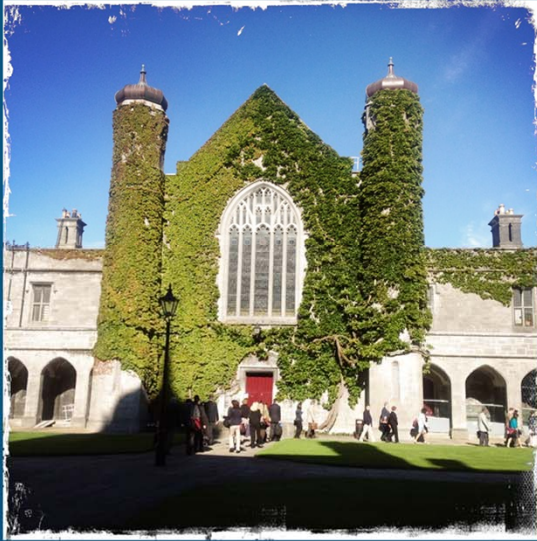
Source: Central Statistics Office, (2011, November 30). Survey on Income and Living Conditions. Retrieved from http://www.cso.ie/en/media/csoie/releasespublications/documents/silc/2010/prelimsilc_2010.pdf

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- Since the economic downturn, consistent poverty and at-risk of poverty rates are slowly increasing.
- The at-risk of poverty rates are increasing fastest among households with children.
- But deprivation rates have increased markedly.
- Deprivation measures the population's struggles
 - to keep their home warm
 - to have a night out
 - to have friends over for a meal
 - to replace furniture or home appliances
- So this really is measuring the belt-tightening that's happened in Ireland

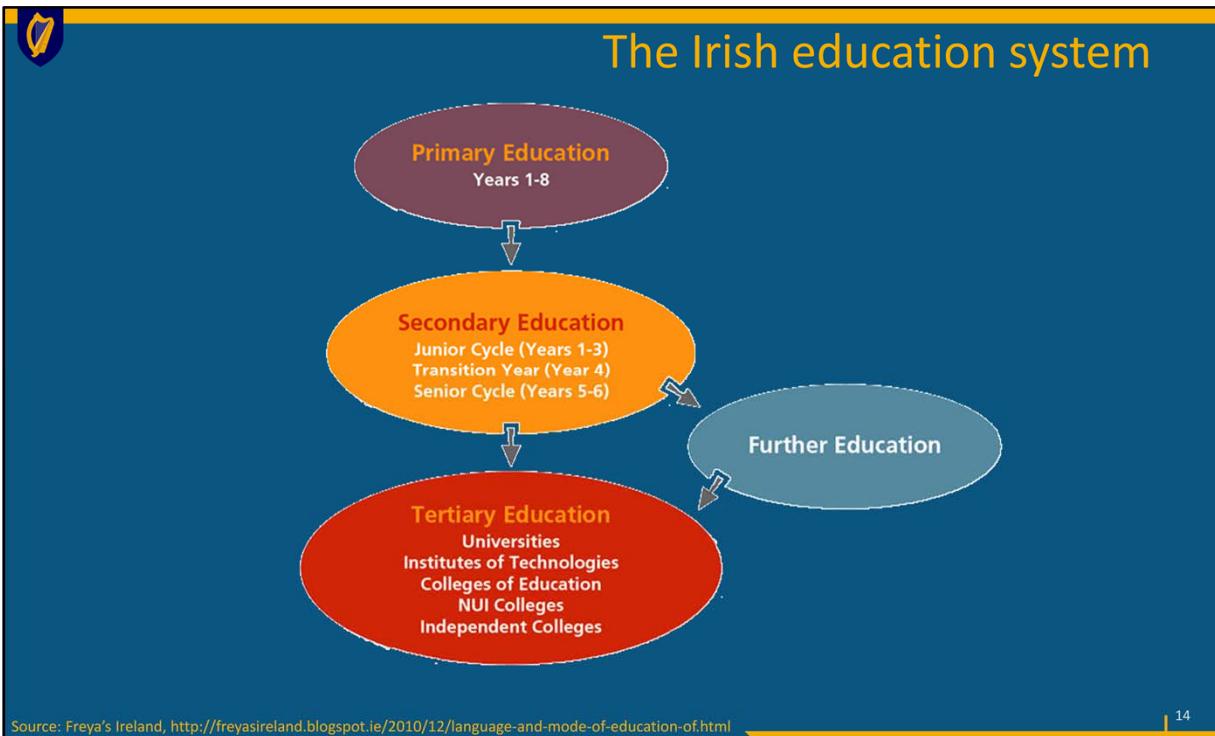


Higher Education in Ireland



NUI Galway, July 12, 2012

Stacia



- Primary and Secondary education look more or less like our elementary and high schools.
- Tertiary education is higher education
- Further education offers training and awards after second-level schooling, but separate and apart from the third level system.



Governance

- Minister of Education and Skills
 - Establishes policy, sets budget
- The Department of Education and Skills
 - Charged with implementing policy (rely on HEA)
- Higher Education Authority (HEA)
 - Coordinating body, advises DES
 - Decides budgetary distribution
 - Manages research programs
- National Strategy for Higher Ed to 2030

National Strategy
for Higher Education
to 2030

Report of the Strategy Group
January 2011



Source: OECD. (2006). *Reviews of national policies for education Higher education in Ireland*. Author.

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- The Department of Education and Skills (DES) establishes the policy
- Higher Education Authority (HEA) distribute funds
- HEA is a statutory body that is responsible for furthering the development of higher education, assisting in the coordination of the state's investing in higher education, preparing proposals for such investment, and advising the minister regarding the need for establishing new higher education institutions
- HEA approves university budgets and manages research programs in third level institutions



Structure of higher education

7 Public universities

- **Largest** University College Dublin, 15,000 FT /4,000 PT students.
- **Smallest** Maynooth, 4,500 FT / 600 PT students.

161,647 students (2010-2011)

University Sector (7) 89,273

Technology Sector (14) 62,885

Teacher Training 6,691

Other publicly-funded 2,798

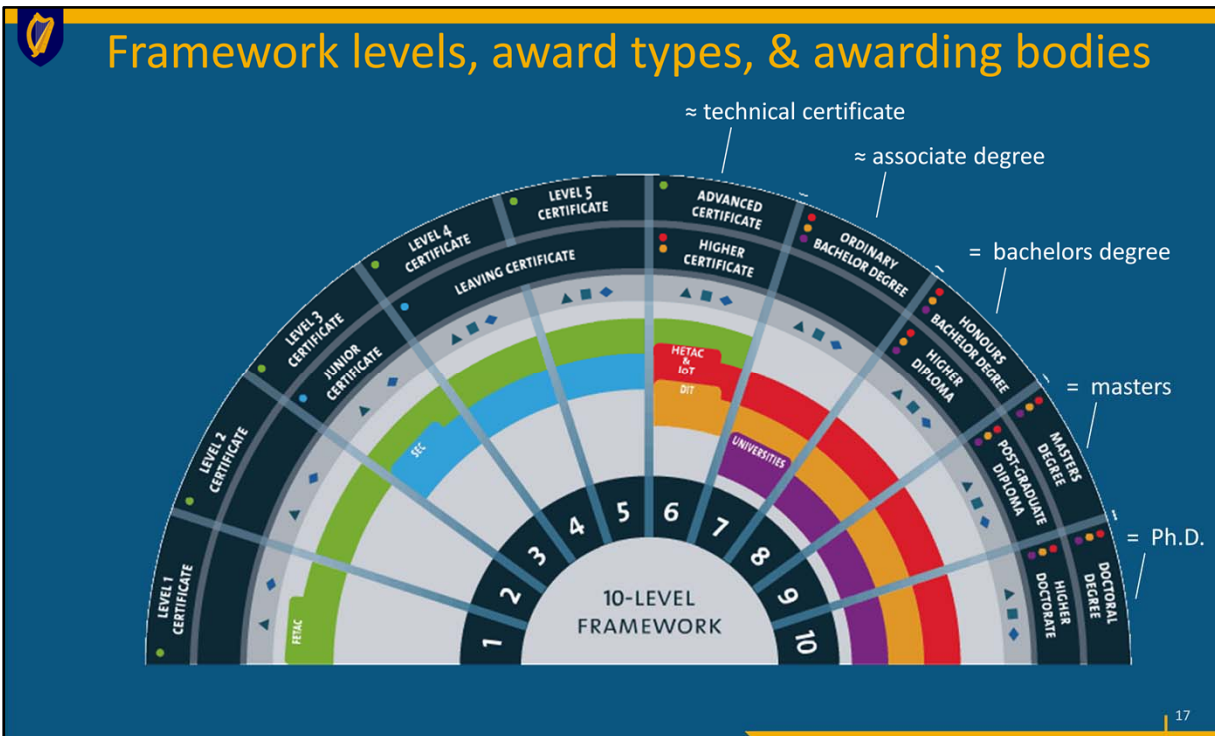
14 Institutes of Technology (“IoT”)

- Originally designated as regional colleges of technology
- **Range** 10,000 FT/5,000 PT down to 3,000 FT and smaller PT populations

Teaching colleges, private, other

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- *-diverse set of institutions; number of instns relative to size of population*
- *-traditionally a binary system*
- *-other instns besides universities and IoTs (colleges of education; private institutions)*
- *- All institutions rank in top 500*



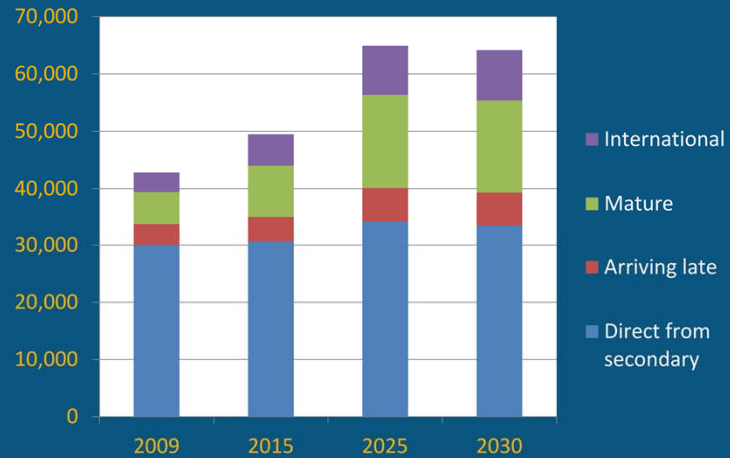
- Skills framework
- Comprehensive across country
- Third-level education is levels 6 and up
- Further rationalised in accordance with the Bologna process in the EU



Population demand for higher education

Ireland's National Strategy projected an increasing demand for higher education

Highest among mature and international students



Source: The Strategy Group. (2011, January). National strategy for higher education to 2030: Report of the strategy group, p. 44. Department of Education & Skills; Forfas, 2012.

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- Projected demand for higher education
- Enrollment of full-time students has increased by 20% between 2005 and 2010.
- Demand is expected to grow 85% by 2030.
- But the strategy's assumptions may have been faulty—they're revising these projections now.
- Increasing educational attainment is central strategy for increasing Ireland's international economic competitiveness
- Industry has identified skills supplied through higher education that are required today and in the future for a competitive economy
- In 2015 majority (2/3) of the jobs created in Ireland will require a college degree



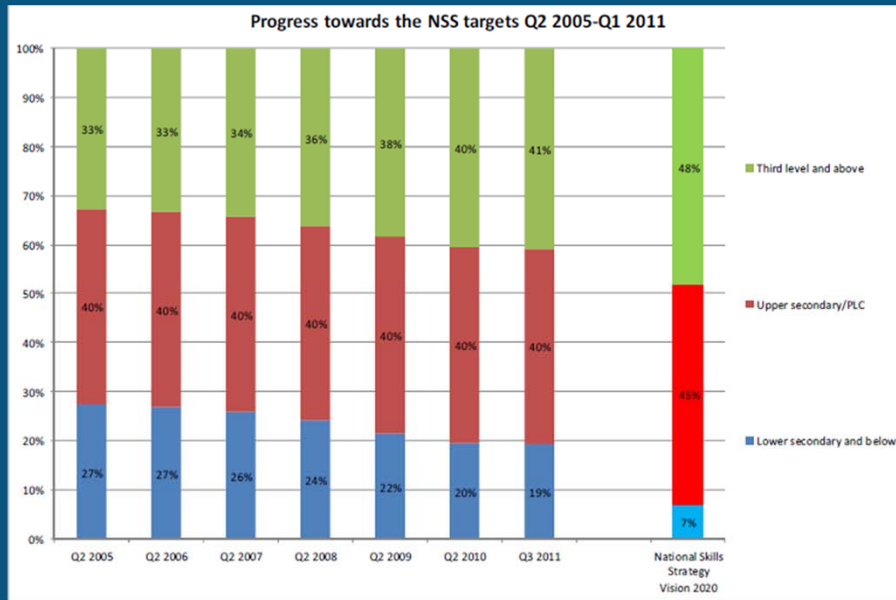
And an increased demand for college-educated workers

- Increased # of job vacancies
- Vacancies most common:
 - ICT
 - Engineering, utilities
 - Accountancy, financial services, insurance
 - Production, manufacturing, materials
- Most require third-level qualification, experience
- Language

Source: The Expert Group on Future Skills Needs Statement of Activity, 2011.
http://www.skillsireland.ie/media/EGFSN020212-Statement_of_activity-publication.pdf



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Discussion