



Ireland

Assessment of the 2008-2010 National Reform Programmes for Growth and Jobs from a social inclusion perspective: The extent of synergies between growth and jobs policies and social inclusion policies

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Content

Summary	4
1. Overall Assessment of Implementation of the NRPs during the Past Year from a Social Inclusion Perspective	5
2. Overall Assessment of the 2008-10 NRP from the Perspective of Social Inclusion.....	5
2.1 Feeding Out.....	7
2.1.1 Employment and feeding out	7
2.1.2. Economic growth, financial sustainability and feeding out	9
2.2 Feeding In Analysis	10
3. Governance.....	12
References	13

Summary

The NRP continues the trend set by last year's NRP of increasing synergies between social and economic policies but it does so to a lesser extent than last year's NRP. There is evidence that some mutually reinforcing actions between growth and jobs on the one hand and social policies on the other are in place in Ireland and of some co-ordination in and between the Irish NRP and NRSSPSI. The two documents contain many of the same proposals and many of the relevant proposals made in the NRSSPSI are also contained in the NRP.

The NRP does not systematically address itself to putting in place specific measures to address the potential impact of the economic slowdown on people at risk of poverty and social exclusion. It does show some consciousness that low-income people will be affected and the recent Budget for 2009 confirmed the government's commitment to uprating social welfare benefits. There are also measures in the NRP which are seen to improve the situation of those affected, especially the unemployed – like the activation measures for example.

In terms of the Spring Council priorities, which are each considered in some detail in the NRP, only the third – flexicurity – has a strong social exclusion focus, being strongly oriented towards integrating social welfare recipients into the labour market and improving the opportunities of vulnerable workers (especially the low skilled and elderly workers).

As one might expect, the NRP is most active on and in tune with the second objective of the NRSSPSI – access to quality work and learning opportunities. Integration of migrants also receives some attention (this was one of the points to watch raised in relation to the 2007 NRP). There could be much greater integration of two of the NRSSPSI priority areas: child poverty and access to quality services. The former is hardly mentioned and the latter, especially if understood to refer to housing services, health services, local neighbourhood services and so forth, receives little attention.

In terms of feeding out, the NRP is strongest in its continued attention to activation programmes for those furthest from the labour market and upskilling of workers through the National Skills Strategy. These now have a firm place in Ireland's employment and social policy portfolio and there are plans both to extend them more widely and to adopt a targeted group approach. However, one can question whether this is a sufficient response, especially in light of the EU's emphasis that quality services and adequate income also need to be part of the response to active inclusion.

Many of the measures contained in the current NRP have already been announced and are actually in place. This suggests that progress is slower than might be expected. It also suggests that more attention should be given to implementation.

Strengths and Weaknesses

On the positive side, the NRP is broad-ranging and is based on a range of concrete programmes and agreements that have strong support at national level. In addition, it is strong analytically and addresses itself to the priority actions identified by the Spring European Council and the points to watch.

On the negative side, there is still a learning curve in relation to recognising that satisfactorily addressing social exclusion requires structural reform in Ireland and that it be a core matter of economic policy. Also the NRP devotes little attention to matters of governance.

1. Overall Assessment of Implementation of the NRPs during the Past Year from a Social Inclusion Perspective

Last year's NRP was very strong in terms of social and economic synergies – social inclusion issues were well-integrated into the NRP, especially from a feeding in perspective. Looking at developments over time, in my view there are real efforts being made to effect inclusion into the labour market with evidence of programmes being both reviewed and altered in light of their relative achievements. It can also be said that Ireland is in the process of recognising that integration of the most excluded into the labour market is a process which must be needs-based and contain clear pathways. Such an approach remains a minority perspective among the different measures in place however. Among other positive developments that have occurred over time rather than in the last year is the rolling out of activation-oriented programmes in the income support ('social welfare' as it is called) and employment and training domains.

Some efforts are being made to assess the impact of policies. The NRP makes reference to a number of reviews in the social inclusion domain, especially in relation to the active inclusion provisions and the National Skills Strategy. Specific details are not always given on the nature of these reviews however and so it is difficult to establish the extent to which they take the form of impact assessment. That said, there is attention being given to implementation and in some areas anyway (viz the National Skills Strategy) the need to review progress towards or indeed put in place a plan for implementation has been recognised.

In terms of good practice, the Lone Parents Voluntary Initiative is impressive. Getting lone parents in large numbers into employment is a very challenging policy objective in Ireland, because of entrenched behaviour patterns, strong normative support for traditional motherhood and a shortage of necessary supports. The initiative reported on pg 62 of the NRP constituted a pilot programme to test approaches and identify barriers to employment experienced by lone mothers. It has the twin merits of being experimental and set up as an experience and research-based learning opportunity.

2. Overall Assessment of the 2008-10 NRP from the Perspective of Social Inclusion

The NRP has a strong analytic content, and is grounded in a review of the social partnership process which was undertaken by the government and social partners during 2008. The essential conclusion reached has been to endorse much of the approach and principles of the current social partnership agreement but also to recognise the need to adapt and 'fine tune' some of the strategic investments in the National Development Plan and the social partnership agreement. This fine tuning, as readable from the NRP, mainly relates to focusing more clearly on target groups, especially as regards the active inclusion measures.

In regard to the extent to which this NRP shows increased awareness of feeding in and feeding out, my opinion is that this year's report, while not showing an increased integration of social and economic issues does continue the approach of recent years, especially last year's NRP, in moving towards a closer relationship between economic and social policy. Among the areas relevant to social inclusion on which one can see continued progress in this report are: integrating those furthest from the labour market, childcare provision in general and as regards targeting it on the low income sectors, integration of immigrants, improving the skills' situation of workers on low

incomes as well as older workers and lifelong learning. Few if any of these are the subject of new initiatives – what the NRP does is mainly report on and continue to roll out existing initiatives.

The NRP does not put in place specific measures to address the potential impact of the economic slowdown on people at risk of poverty and social exclusion. It does show some consciousness that low income people will be affected and the recent Budget for 2009 marks the government's commitment to maintaining the value of social welfare benefits. There are also measures in the NRP which are seen to improve the situation of those affected – like the activation measures for example – but these are not generally conceived as measures targeted at the disimproving economic situation.

In terms of social inclusion and the social dimensions more broadly, there is little social content in Ireland's response to the Spring Council priorities. In regard to investing more in knowledge and innovation, the strategy (and the national policy document on which it is based – *Innovation Strategy Statement* - which was produced in June 2008) mainly consists in infrastructural investment and development. It is stated that a strategy for the knowledge society is being prepared. This must take cognisance of the potential of knowledge and innovation as part of a strategy to reduce social exclusion and also the negative effects of social exclusion on the progress towards a knowledge society. It must go beyond technical matters, with the 'societal' aspect receiving attention alongside the economic and technological aspects. The current NRP generally relies on existing measures and could not be said to contain innovations which advance quality education as a route out of poverty and social exclusion. It does better on the training aspect which, among other things, is to take in a broader set of target groups (including lone parents and the long-term and young unemployed).

Neither does the response to the second objective – unlocking business potential, especially of SMEs – contain any significant reference or relevance to social exclusion. This is something of an opportunity lost because: a) service sector employment (which is to be a priority in Ireland's future development strategy) has major potential for employment creation that would help those at risk of poverty and social exclusion, b) the plans to enhance skills development could be directed at the low income sector and c) locally trading service enterprises could also make a significant impact on social exclusion, by directing their attention to low-income neighbourhoods or in some other ways.

The third objective – improved employability through flexicurity – does have a strong social exclusion focus. As specified in the NRP Ireland's approach to flexicurity policy centres around achieving a balanced mix of policies on employment rights, welfare benefits, income tax and training/upskilling. The NRP shows a recognition of the significance of both active labour market programmes and also tax and social welfare provisions as part of a forward-thinking strategy on employability. Notably the NRP makes no specific proposals in response to the Spring Council request that member states take concrete action to substantially reduce the number of young people who cannot read properly and also the numbers of early school leavers. While Ireland already has some measures in place to meet these concerns, and has targets in these regards, the NRP does not advance these in any way.

The response to the fourth Spring Council priority – an efficient and integrated EU energy policy – contains not a single reference to social exclusion-related objectives and again misses the opportunity to target some measures on low-income sectors of the population, either as producers or consumers. For example, the production of environmental goods and services, energy efficiency incentive schemes, renewable energy programmes all have major relevance

from a social inclusion perspective as do a fuel-support programme and transport policy for the low income sectors of the population. In this context it is useful to note an insightful recommendation in regard to a carbon tax recently made by the Combat Poverty Agency (2008). To address the negative distributional outcomes of a carbon tax, it proposed that the revenue arising from the tax be used to tackle fuel poverty and to redistribute resources towards low-income households. In the first instance, it is proposed that a proportion of the revenue should be used to compensate low-income households for the higher fuel costs arising from a carbon tax. Second, resources should be invested in domestic energy efficiency measures (both insulation and heating systems) to reduce the number of households at risk of fuel poverty. Funding for energy-efficiency measures should also be provided for community facilities, with a priority on those in low-income areas. Third, the remaining revenue should be recycled in ways which redistribute resources towards low-income households, such as reducing indirect taxes. Some funding should also be ring-fenced to increase the subsidy for public transport use

Overall, the treatment of the Spring Council priorities is revealing, and suggests that a compartmentalised way of thinking prevails whereby economic and social policy are seen to be essentially distinct domains. While some progress has been made in breaking down such barriers in recent years, Ireland still has a distance to go in integrating the economic and the social and in particular in using economic policies to target social issues (feeding out).

2.1 Feeding Out

2.1.1 Employment and feeding out

Just as with last time, there are proposals in the NRP which are likely to be positive from a social inclusion perspective, especially if one views social inclusion in terms of inclusion in the labour market and upskilling of the low skilled. These are among the areas that are to be upgraded as a response to the deterioration of the economic environment. The main relevant planks here are the targeting of vulnerable groups for activation, the plans to secure the future of pensions, the expansion of the National Skills Strategy and the commitment to the maintenance of social welfare benefits.

On the basis of the NRP, one has to say that the measures to promote job creation are not as such targeted on the more vulnerable groups. A supply-side approach prevails and the underlying logic of the policy approach followed in Ireland continues to assume that the main benefits of job creation will 'trickle down', especially if those most marginalised from the labour market are 'assisted' to become economically active.

The NRP indicates that the targeting of activation and participation will be increased. Among the groups mentioned in this context are the long-term unemployed, the unemployed aged between 16 and 24 years, people who have completed the Preventive Process but remain unemployed, and those furthest from the labour market including certain women workers and people with disabilities. A second measure which the NRP reports on is the rolling out of the Social and Economic Participation Programme (which was also included in the NRSSPSI) to extend activation measures to all people of working age who are in receipt of welfare benefits, with reference made specifically to lone parents and people on illness payments. It seems that this programme has now commenced. The NRP also announces the creation of a new Activation and Family Support programme (which notably the NRSSPSI contained no mention of, even though it was set up in January of this year). This is a positive development because it represents funding for holistic, needs-oriented programmes to assist individuals and families to enhance their

employability through education, training and personal development opportunities and to improve their quality of life. It is a good example of rationalisation of existing provision, constituting an amalgamation of the existing Family Services project and the Special Projects funding. It is stated that a review of the programme is currently underway and is expected to be completed in January 2009.

The main employment-related responses for the vulnerable contained in the NRP are active labour market programmes as well as some efforts to rid the system of disincentives and poverty or benefit traps. While there is definitely an intention to effect greater targeting of such programmes and also greater use of a pathway approach in the various activation programmes, there are real limits to the strategies proposed given rising unemployment and sectors of hardcore joblessness. The latest Live Register figures – just released (November 5th 2008) – show that unemployment climbed 0.4 percentage points in the last month (up from 6.3% to 6.7%). The rise is very steep, exceeding estimates which placed it at 5.8% for the year. Some commentators have called for a stronger preventive approach towards unemployment, viz fiscal stimulus measures (Irish Times November 5th 2008).

In particular, we still await structural reform and a *National Strategic Framework* to ensure the coherence and integration of the €1,000 million per annum currently being expended on labour market and social inclusion policies aimed at tackling the problems of labour market vulnerability (as recommended by the NESF in 2006). The local level is critical and there is only limited evidence of progress in targeting it. A 'Personalised Action Plan' was also recommended by the NESF to be put in place for each person, especially those who are most marginalised from the labour market, detailing the supports they will receive (from all service providers) and their own obligations and incentives in availing of them. We still await the full implementation of such an approach.

In terms of activation and what should be in such an approach in Ireland the work of EAPN is helpful. In a recently produced document (EAPN Ireland 2007), EAPN suggests the following as basic pillars of a successful activation policy: quality jobs, the elimination of poverty traps, accessible education and training, family friendly flexible work, elimination of discrimination, recognition of caring responsibilities, recognition of ill-health, appropriate supports and services and instant access to relevant information.

The need for a holistic response was also stressed by the National Economic and Social Forum (NESF 2006), which underlined that the barriers to employment cross four main domains – economic, social, labour market and personal. NESF recommendations included the necessity of developing a long-term funding model to support community-based childcare; providing medical cards for a five-year (cumulative) period after returning to work; allowing retention of secondary benefits for an agreed period when a person takes up training, education or work and index-linking the household income threshold for the retention of secondary benefits to the annual increase in the level of average earnings. While it does not exactly fit this model, the ETW (Expanding the Workforce) programme, reported on pg 62, does have many positive features. It is a very broad-ranging support process providing needs based, multi-step support that sets out a pathway for women back into employment.

The NRP devotes little explicit attention to economic security and the risk of falling into poverty and social exclusion especially in the current climate of reduced employment and increased unemployment. Only a very short discussion of income support measures is offered (section 1.4.3) and these are relatively routine in their references to taxation and social welfare support.

Hence the question has to be asked if the NRP goes far enough in addressing poverty and social exclusion? One of the main factors associated with social exclusion in Ireland is financial shortage and need. Relative poverty rates are high by EU standards. This year's NRP continues to place strong reliance on the labour market as a response to poverty. This as a sole or even primary response is inadequate, especially in light of the EU approach which emphasises a tripartite response of activation, adequate income and access to quality services.

The extent to which the combination of wages, tax exemptions and in-work and family benefits ensures that people moving into employment are also moving out of poverty is a big issue in relation to the NRP (and also the NRSSPSI). The National Economic and Social Council (NESC) (2005) and the National Economic and Social Forum (NESF) (2006) both pointed out that significant poverty traps remain in the social welfare system, by virtue of the too rapid withdrawal of a person's secondary benefits on taking up work. In the view of the NESF, this has been exacerbated by the growing complexity of the means-tested benefit system and lack of indexation of household means-tested income disregards before secondary benefits are lost. A number of disincentives/anomalies were identified, including the fact that rent supplement is available only to those receiving benefits and is withdrawn upon taking up employment and that the earnings disregards attaching to continued receipt of welfare benefits while employed have not been raised to reflect the growth in costs or general earnings. While the NRP plans to make withdrawal of benefits less severe, neither it nor Budget 2009 addresses these issues in fundamental ways.

There is no specific discussion of the reconciliation of work and family life although childcare receives considerable attention. Among the recommendations of the recent OECD Economic Survey (2008) relevant to maintaining economic growth were increased out-of-school-hours care, more measures to help lone parents participate in the labour market as well as a sharpening of incentives for second earners to work full time. Each of these is on the policy agenda in Ireland – and especially the first two.

There are many proposals for older workers who generally are given a high priority. These include extension of the Preventive Process to workers aged between 55 and 64 years together with the elimination of the Pre-Retirement Allowance (which effectively incentivised early exit from the labour market by older workers). The NRP also talks of promoting a cultural change of mindset among both employers and employees to encourage and support older workers to remain in employment. There is evidence in my view that Ireland is engaging in active aging strategies.

As mentioned the response to the second objective – unlocking the potential of SMEs to create employment – has no real conception of social exclusion or the needs of the socially excluded.

2.1.2. Economic growth, financial sustainability and feeding out

Although a large proportion of low-income earners do not pay tax and there is a commitment that persons earning the national minimum wage should remain outside of the tax net, the extent to which economic growth is envisaged to increase the resources of those on the lowest incomes and reduce income inequalities is limited. At best economic and fiscal policy seeks to maintain the relative position of low income earners.

As was the case last year, apart from some targeting of vulnerable groups and attention to training and low pay, the NRP evinces almost no consideration of its impact on jobless households, income distribution or poverty levels in general.

The impact of fiscal consolidation on the modernisation of social protection systems and on its ability to ensure greater cohesion is taken into account in two main respects: protecting the incomes of social welfare recipients and enhancing the activation activities and orientation of the social security system. As mentioned, there is also some attention to benefit and income traps and disincentives to take up employment but this is relatively minor. In general this section of the report tends to look backwards to past achievements rather than to list measures in the pipeline. For this and other reasons, I can see little direct evidence in the report that changes in fiscal policies have taken their impact on social inclusion into account and in fact one could argue that the decision to impose a general income levy in the recent Budget (of 1% on incomes up to €100,000 and 2% on incomes above that threshold) even if it did exclude those on minimum wage is not a progressive measure. Among other things, it will have the effect of bringing some low-income earners into the tax system, thereby countering stated policy to keep them outside taxation.

There are no specific measures in the NRP to address territorial differences

There are no specific measures to increase access to the internet for the low-income and excluded sectors of the population.

There are no specific measures to promote financial inclusion or address over-indebtedness.

The only measures to address housing indirectly address access to housing on the part of those on low incomes. In particular, the plan to extend the existing local authority mortgage scheme is important in this context. However there are measures in the NRSSPSI – on homelessness for example – that could be advanced through the NRP as well but they are not.

2.2 Feeding In Analysis

There is a section in the NRP which specifically addresses the linkages to social policy (section 1.7). However, this essentially directs the reader to the NRSSPSI and tends to state, rather than demonstrate, interconnections and linkages between the NRP and the NRSSPSI. It must also be said that this year's NRSSPSI made little reference to how the social inclusion strategy would enhance the strategy for jobs and growth or how that latter strategy is actively delivering on greater social inclusion.

Nevertheless, while the core links with the social protection and social inclusion process are rarely made explicit in the NRP, as with last time, a linkage could be said to exist given that the two documents contain many of the same proposals and many of the proposals made in the NRSSPSI are incorporated into the NRP.

Of the four objectives in the NRSSPSI, that on access to quality work and learning opportunities receives the most sustained attention in the NRP. Hence it is possible to say that the active inclusion agenda is taken account of. This is certainly the case in terms of employment activation. The NRP also offers a brief discussion of the necessity of an adequate minimum income. It is difficult to see this discussion and the commitment to adequate income reflected in the recent Budget however. While it announced increases in the state pensions of €7 a week from next year, while other social welfare payments, including the jobseekers' benefits and allowances, are to go up by €6.50 for individuals (an increase of some 3.3%), the scale of these increases plus other changes (such as the income levy referred to above) makes this year's Budget less progressive as compared with those of recent years. The Budget increases look meagre especially in the

context of food price inflation which is well ahead of the standard rate of inflation (see Annex). The allocation in the Budget to meet this additional cost is only 55 cents a week whereas a supplement of €3.95 a week has been calculated as the necessary amount to address the average shortfall (CORI 2008: 2). There is some targeting of the unemployed however – in fact the unemployed were the benefit population group that gained most from the Budget (ibid: 7).

Services are not systematically considered in the NRP either, especially from the perspective of social exclusion. This is an area of divergence between the NRP and the NRSSPSI given that the latter devoted a lot of attention this year to services and how they can break the cycle of disadvantage. This recognition has not really penetrated the NRP, apart from perhaps the most obvious services (like housing and active labour market programmes). Health service availability and reform receive no attention. This may be because the ‘division of labour/perspective’ operating at national level views this as a matter for social inclusion policy.

The education measures in the NRP do not appear to have been assessed for their social inclusion benefits and their contribution to growth and jobs – note that in the Budget Government announced plans to reduce the allocation to special initiatives in adult education by 3%, to reduce the grants to adult education organisations by 2% and to reduce the grants to youth organisations by 10%. These changes are likely to have a negative effect on the achievement of targets around adult literacy.

There is a small section in the NRP on gender equality (effectively women). This is very descriptive however, effectively referring the reader to the *National Women’s Strategy 2007-2016* (which was produced last year) and the relevant measures targeting women in the National Development Plan. The NRP announces that gender mainstreaming is to be implemented as the principal instrument for the achievement of gender equality in Ireland – this was stated also last year. It appears that little progress has been made in implementing gender mainstreaming since last year as this year’s NRP also reports vaguely that “discussions are continuing’ about the necessary measures to put this in place.

There are no particular anti-discrimination proposals in the NRP but it should be noted that the work of the National Employment Rights Authority, which is endorsed as part of the national approach to flexicurity, is proceeding.

I see little evidence that the contribution of measures to prevent and reduce child and family poverty to promoting growth and jobs has been systematically considered. There are traces of recognition of child poverty in the childcare-related measures but as indicated in my earlier report on the NRSSPSI Ireland still lacks a clearly worked out national policy on childcare and the existing policies derive mainly from a desire to increase parental employment rates rather than as an anti-child poverty measure. In addition, the recent Budget leads one to question the stated commitment to reducing child poverty. On the positive side it raised the thresholds for the Family Income Supplement (the income supplement for low-paid families with children). However, for the first time in many years it failed to increase the universal Child Benefit. It also cut the duration of the Early Childcare Supplement by a half a year (from next year it to be paid until the child is 5 and a half years rather than 6 years) and announced plans to cut education services especially for language assistance (hence disbenefiting the children of migrants).

There is no attention to the potential of the social economy to create jobs for those furthest from the labour market.

One group that can be identified as being considerably better integrated into this NRP as compared with last year is immigrants (the integration of whom is also one of the four primary objectives of the NRSSPSI). The NRP contains a very broad-ranging discussion of the social and economic integration of migrants, making it clear that policy in this area recognises the need to take a joined-up perspective, integrating a concern with migrants into labour market policy (including provisions oriented to improving skills and guaranteeing workers' rights), education, social integration, community initiatives and anti-racism policy.

In fact, I consider the approach taken to the social integration of migrants an example of good practice and an area showing significant improvement vis-à-vis last year's NRP. There they were discussed primarily in terms of 'economic migration' (rather than as a target group). The response this year is in effect a feeding in good practice example in that it represents an area where a primarily economic orientation response has gradually been amplified by a social and institutional response and one in which social inclusion is a guiding idea⁽¹⁾. There is attention also to process and implementation with the role of a wide range of 'partners' as well as new consultation structures and research.

3. Governance

There is little explicit information on governance, and in particular the extent to which relevant stakeholders have been involved. It is stated that the NRP is grounded in a review of the national social partnership which was undertaken during the mid months of 2008 by the government and the social partners.

This being the Irish report there is no doubt but that the social partners are closely involved. However, it is not clear if the stakeholder involvement went beyond this or how systematically the social inclusion stakeholders have been involved. It is my impression that, as with last year, there was little or no consultation outside of the social partnership processes. In addition, there is no reference in the NRP to the heightened importance given in the National Action Plan for Social Inclusion to the Social Inclusion Office in the overall planning process and the intention to produce an annual social inclusion report.

As regards monitoring and evaluation or other measures to assess outcomes, monitoring has been institutionalised by the social partnership process. There are also the poverty impact assessment tools, into which effort has been invested to roll them out across departments and unit and at local level. However, these have not been centrally integrated into the economic planning process and one misses overall a strong analysis of results, timetables and the causal factors that underlie achievement.

As regards co-ordination, a point of potential criticism concerns the degree of integration and coherence among the different measures. While there is no doubt but that the NRP and other programmes are centrally linked into the agreements emanating from the national social partnership process, this does not always make for coherence in terms of provision. As I have pointed out, there is a risk of overlap and inefficiency, especially as regards the active labour market programmes, of which a multitude now exist, crossing a range of target groups and also providers and home agencies or departments.

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