

**Statistical Potential of Business and Environment  
Enterprise Data Holdings in Selected Government  
Departments**

**Working Report**

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## Abbreviations

<b>Abbreviation</b>	<b>Glossary</b>
ACCESS	MS database
ADM	Area Development Management
AFDF	Aircraft fleet declaration form
ARN	Artists Reference Number
ASI	Annual Service Inquiry
BIS	Bank for International Settlements
BMW	Border, Midland and Western (Region)
BOP	Balance of Payments
CAPI	Computer assisted personal interviewing
CBFSAI	Central Bank and Financial services Authority of Ireland
CBL	Chester Beatty Library
CCS	Corporate Customer System
CIE	Iarnród Éireann Bus Éireann, Dublin Bus, CIE Tours International
CII	Collective Investment Institutions
CIMS	Client Information Management System
CIP	Census of Industrial Production
CiS	water information system
CIs	Credit institutions
CLÁR	Ceantair Laga Árd-Riachtanais
CLÉ	Irish Book Publishers Association
CMMS	Cattle Movement Monitoring system
CNCI	Council of National Cultural Institutions
CO	Carbon monoxide
CO <sub>2</sub>	Carbon dioxide
COFOG	Classification of Function of Government
CRO	Companies Registration Office
CRS	Country of Residence Survey
CSIs	Common Safety Indicators
CSO	Central Statistics Office
DAF	Department of Agriculture and Food
DAST	Department of Arts, Sport and Tourism
DB	Disability Benefit
DCRGA	Department of Community, Rural and Gaeltacht Affairs
DES	Department of Education and Science
DETE	Department of Enterprise, Trade and Employment
DOE	Department of the Environment, Heritage and Local Government
DoEHLG	Department of the Environment, Heritage and Local Government
DTO	Dublin Transportation Office
ECB	European Central Bank
ECMT	European Conference of Ministers for Transport
ED	Electoral Division
EHECS	Earnings, Hours and Employment Costs
EPA	Environmental Protection Agency
ERASS	Exercise, Recreation and Sport survey
ERDF	European Regional Development Fund
ESA	European System of Accounts
ESB	Electricity Supply Board
ESCB	European System of Central Banks
EUROSTAT	Statistical Office of the European Communities
Eurosystem	ESCB+ECB
EU-SILC	EU Statistics on Income and Living Conditions
FAS	Foras Áiseanna Saothair
FHWA	Federal Highway Administration

FI	Fáilte Ireland
FISIM	financial intermediation services indirectly measured
FMS	financial management system
Forfas	The national policy and advisory board for enterprise, trade, science, technology and innovation
GAA	Gaelic Athletic Association
GDP	Gross Domestic Product
GERD	Gross national expenditure on R&D
GEU	Gender Equality Unit
GHG	Greenhouse Gases
GIS	Geographic Information Systems
GNI	Gross National Income
GNP	Gross National Product
GPAS	Grants and Premium Administration System
GPS	Global Positioning System
HACCP	Hazard Analysis Critical Control Path
HBSC	Health Behaviours in School-aged Children
HEA	Higher Education Authority
HTS	Household Travel Survey
ÍÉ	Iarnród Éireann
IFB	Irish Film Board
IFSC	International Financial Services Centre
IFSRA	Irish Financial Services Regulatory Authority
IIP	International Investment Position
IMDO	Irish Maritime Development Office
IMF	International Monetary Fund
IMMA	Irish Museum of modern Art
INSPIRE	INfrastructure for SPatial InfoRmation in Europe
INTRASTAT	Intra EC Trade Statistics
IPC	Integrated Pollution Control
iPLAN	computer based planning system
IPPC	Integrated Pollution Prevention Control
IRSC	Interim Rail Safety Commission
ISC	Irish Sports Council
ISDI	Irish Spatial Data Infrastructure
ISO	International Standards Organisation
LA	Local Authorities
Labinfo	laboratory information system
LGCSB	Local Government Computer Services Board
LPG	Liquified Petroleum Gas
LPIS	Land Parcels Identification System
LSP	Local Sports Partnership
LUAS	Dublin Light Rail
MAC	Management Advisory Committee
MFI	Monetary Financial Institution
MFI ID	Monetary Financial Institution identification code
MMFs	Money Market Funds
NACE	General industrial classification of economic activities within the EU
NCCS	National Climate Change Strategy
NCDP	National Coaching Development Programme
NCT	National Car Test
NCTC	National Coaching and Training Centre
NDP	National Development Plan
NEC	National Emission Ceiling
NES	National Employment Survey
NFS	National Farm Survey
NGB	National Governing Body

NIR	National Inventory Report
NITB	Northern Ireland Tourist Board
NOX,	Nitrogen oxides
NRA	National Roads Authority
NSB	National Statistics Board
NTMA	National Treasury Management Agency
NUTS	Nomenclature of Territorial Units (for Statistics)
NVD	National Vehicle and Driver File
OAP	Old age pensioner
OECD	Organisation for Economic Cooperation and Development
OFI	Other financial intermediary
OPW	Office of Public Works
OSi	Ordnance Survey Ireland
PAYE	Pay As You Earn
PCI	Passenger Card Inquiry
PM10	Particulate Matter with a diameter less than 10 microns
PPSN	Personal Public Service Number
PQ	Parliamentary Question
PSV	Public Service Vehicle
QBC	Quality Bus Corridor
QNHS	Quarterly National Household Survey
R&O	Review and Outlook
RAPID	Revitalising Areas by Planning, Investment and Development
REPS	Rural Environment Protection Scheme
RORO	Roll on, Roll off
RTPI	Real Time Passenger Information
S&E	Southern & Eastern (Region)
SAD	Single Administrative Document
SAPS	Small Area Population Statistics
SAS codes	Small Area Spatial Codes
SEI	Sustainable Energy Ireland
SFP	Single Farm Payment
SLÁN	Survey of Lifestyles, Attitudes and Nutrition
SNZ	Statistics New Zealand
SO2	Sulfur dioxide
SOT	Survey of overseas travellers
SPAR BES	Statistical Potential of Administrative Records Business and Environmental Statistics
SPS	Single Payment Scheme
TARGET	an interlinked payments system for the 25 EU Member States and the European Central Bank
TDI	Tourism Development International
TI	Tourism Ireland
TNS-MRBI	Market research agency
TSA	Tourism Satellite Account
UCITS	Undertakings for the Collective Investment in Transferable Securities
UIC	International Union of Railways
UNFCCC	United Nations Framework Convention on Climate Change
VAS	Visitors attitudes survey
VAT	Value Added Tax
VIMA	Vies Intrastat mutual assistance
VOC	Volatile organic compounds
VRO	Vehicle Registration Office
WDC	Western Development Commission
WIF	Western Investment Fund
YPSF	Young People's Facilities and Services Fund

## Preface

In the NSB's Strategy for Statistics 2003-2008, the National Statistics Board articulated a medium-term strategy to support the development of Ireland's statistical system. A key pillar of the Board's strategy was for the CSO to work with Government Departments and Agencies to maximise the use of administrative data to generate statistics. A number of reports have already been produced to support this objective. In September 2003, the CSO completed an examination of social data holdings in six Government Departments<sup>1</sup>. In November 2005, an NSB examination of policy needs for statistical data on enterprises was published<sup>2</sup>.

To conduct this Study, the CSO formed eight teams to work with the key owners of enterprise data holdings across the public sector. This report contains the full report from these teams. This report should be considered to be a "working report" and reflects the interactions between the CSO teams and a selection of contacts in various Government Departments.

I would like to thank all of the participants in the Study including the staff in the relevant Government Departments and Agencies who generously gave of their time and expertise.

Donal Garvey  
Director General

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<sup>1</sup> [http://www.cso.ie/releasespublications/documents/other\\_releases/spar.pdf](http://www.cso.ie/releasespublications/documents/other_releases/spar.pdf)

<sup>2</sup> [http://www.nsb.ie/pdf\\_docs/policy\\_needs.pdf](http://www.nsb.ie/pdf_docs/policy_needs.pdf)





# Chapter 1

## Central Bank and Financial Services Authority of Ireland

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## 1.1 Introduction

The Director General of the CSO, the SPAR BES Project Manager and the SPAR BES Team Leader met the Governor of the Central Bank and Financial Services Authority of Ireland (hereafter referred to as the CBFSAI) and senior staff of its Statistics Department on 18 June 2004 at Bank Headquarters. This meeting followed the joint letter sent to the Governor at the end of May by the Secretaries General of the Department of the Taoiseach and the Department of Finance indicating the background to the National Statistics Board initiative (to develop business and environmental statistics to meet policy needs) and requesting the CBFSAI's cooperation with the CSO on the project.

The CBFSAI Governor welcomed the project and said that the CBFSAI would provide whatever information and assistance was required. It was agreed that the CSO's review of the CBFSAI's data holdings, including those of IFSRA (Irish Financial Services Regulatory Authority) would be coordinated through the CBFSAI's Statistics Department. For the purposes of the document, the name CBFSAI is used to cover the overall organisation, encompassing the Central Bank and IFSRA. A glossary of acronyms is provided.

Active work commenced immediately and contact arrangements were made between the CSO's SPAR BES (CBFSAI) Team and the CBFSAI's Statistics Department. A significant number of contacts were made subsequently by means of meetings, e-mail, telephone and post.

As a first task, a list of the CBFSAI data holdings was drawn up and supplied to the CSO Team. This list was then considered by both sides and, based on the degree of overall importance attached by the CBFSAI to each holding as well as the Team's existing level of understanding of these sources, an initial prioritisation for examination was jointly agreed.

In addition, the CBFSAI was invited to complete the standard questionnaire sent to all institutions participating in the SPAR BES Project, which asked users to specify their data needs for policy purposes, to identify those which are filled from internal or external sources, and to indicate their priorities among those that are not currently being met.

In order to understand and assess the CBFSAI's data holdings and its statistical requirements for policy purposes, it is useful first to describe briefly the role of the institution and then to provide a listing of the data holdings underpinning this role. In this context, it is important to mention that the CSO and the CBFSAI have cooperated for many years, particularly in the general area of balance of payments (BOP) statistics compilation and more recently in the preparation of Financial Accounts statistics. There is ongoing and deepening contact between the two organisations. In the case of BOP statistics, this contact takes place within the context of a formal written agreement, which was required under the provisions of European Central Bank (ECB) legislation concerning balance of payments and related statistical compilation. This agreement covers both the quarterly BOP and IIP requirements of the ECB, the main details of which are published nationally, and the monthly BOP estimates prepared specifically for the ECB. In the field of financial accounts, the arrangements are currently on an informal basis, but consideration is being given to the need for a formally agreed approach in this area. A considerable amount of informal contact exists as well. The examination of the CBFSAI's data holdings for the purposes of this Project was therefore undertaken not only on the basis of information gathered during the course of the Project but also using CSO knowledge gained over the years from ongoing contacts.

### 1.1.1 Role of the CBFSAI

As described in its *Central Bank Three Year Strategic Plan* published on 12 July 2004, the CBFSAI was established on 1 May 2003. It carries out all the activities which up to that date were undertaken by the Central Bank of Ireland as well as additional regulatory and consumer protection functions for the financial services sector. The CBFSAI comprises two component bodies:

- ◆ The Central Bank, which has responsibility at the European level for implementing ECB monetary policy and maintaining financial stability, while on the domestic scene it is responsible for providing economic analysis, operating and maintaining currency and payment systems, investment of foreign and domestic assets, and the provision of central services; and
- ◆ The Irish Financial Services Regulatory Authority (ie the Financial Services Regulator), an autonomous entity within the CBFSAI which is responsible for domestic financial sector regulation and consumer protection.

As part of the Eurosystem (European System of Central Banks – the ESCB - and the European Central Bank – the ECB), which was established on 1 January 1999 and whose primary function is the determination and implementation of monetary and exchange rate policies, the CBFSAI's main responsibilities include:

- ◆ Contributing to the maintenance of price stability (low inflation) and a stable financial system;
- ◆ Ensuring safe and reliable payments and settlements systems;
- ◆ Producing and distributing euro banknotes and coins and ensuring their security and integrity; and
- ◆ Managing foreign exchange assets on behalf of the ECB.

These responsibilities are also reflected in CBFSAI's domestic role which includes, additionally:

- ◆ Managing certain investment assets on behalf of the State;
- ◆ Providing advice and guidance on Ireland's economic policies; and
- ◆ Generally serving the public interest.

To fulfil these responsibilities and functions, the CBFSAI collects and uses a significant volume of quantitative and qualitative financial information. Much of this information is collected for statistical purposes and a considerable amount is collected for supervisory and regulatory purposes. The CBFSAI also uses information compiled externally, e.g. CSO economic data, Government Debt data from the National Treasury Management Agency (NTMA), etc. The CBFSAI also fulfils certain statistical obligations to a number of international organisations, namely the Bank for International Settlements (BIS), the International Monetary Fund (IMF), Eurostat, and the Organisation for Economic Cooperation and Development (OECD).

Part of the SPAR BES Project focussed on the CBFSAI's major data needs for key policy purposes. This issue is addressed further in the next section (1.2) and is also considered more generally in the NSB Report because of its important cross-cutting dimension.

## 1.2 Policy context

The CBFSAI provided the SPAR BES Team with information on its main statistical requirements for key policy purposes both on the domestic front and in relation to the CBFSAI's membership of the ESCB. A summary of those data needs which are currently not met is given in Appendix 3 of this Report.

A vast amount of statistical and regulatory information is collected directly by the CBFSAI on a statutory basis. This information assists the ESCB generally in formulating and implementing monetary and exchange rate policy for the euro currency and in ensuring low price inflation and financial stability. Data compiled by other national authorities such as the CSO (e.g. statistics on balance of payments - BOP, international investment position - IIP, some elements of the Financial Accounts and other economic statistics covering prices, employment, retail sales, household income and expenditure, GDP and GNI growth rates, etc), and the NTMA (on government debt, foreign investment for national pension purposes, etc) are also used by the ESCB to assist it in the performance of its statutory functions. These economic data also assist the CBFSAI in assessing Ireland's economic performance and in providing advice and guidance to national policy makers.

In examining its data needs for policy evaluation and formulation, the CBFSAI has suggested a sizeable number of refinements and additions to the existing CSO data, and is of the opinion that, if implemented, these refinements would further assist it in reviewing and assessing Ireland's economic performance. The suggestions cover most economic statistical domains (National Accounts, BOP, IIP, merchandise trade, employment and earnings/labour costs, household assets and liabilities, industrial stocks, turnover and production).

The data gaps given the highest priority by the CBFSAI are:

- ◆ Indicators of the financial health of the household and non-financial corporate sectors covering:
  - Household investments and indebtedness; and
  - More up to date corporate accounts showing profitability, liquidity, etc;
- ◆ Economy-wide Labour Cost Index (Quarterly frequency);
- ◆ Improved regular data on the housing market, such as:
  - A regular national house price series with hedonic adjustment for national, urban and non-urban areas;
  - A series on housing transactions (purchases); and
  - A series on vacancy rates in housing.

Work is underway within the CBFSAI to develop quarterly Financial Accounts statistics in line with its statutory ECB requirements. The CSO has recently commenced production of some of the relevant statistical series for this purpose. The CBFSAI has a crucial immediate need for further complementary data from the CSO (e.g. for the rest of the world and non-financial corporations, including domestic counterpart data), and from other administrative sources to support this key statistical demand. Work is actively underway in the CSO to address these needs on an ongoing basis.

Medium priority requirements are:

- ◆ Data on loan and credit card payment arrears and defaults;
- ◆ Insolvency and bankruptcy data for private individuals and corporates;
- ◆ Market value/replacement cost value of capital stock;
- ◆ Employment breakdown between public sector and private sector, consistent with QNHS;
- ◆ Output, Output per hour and Unit Wage Cost Index, weighted by employment (as well as by output);
- ◆ Annual National Accounts (output side) consistent with sectors in QNHS (ie to enable calculation of output per worker at sectoral level) – particularly services sectors;
- ◆ More information on indicators used to determine output in the services sector as broadly defined;
- ◆ Labour market vacancy rate – to assess the risks of inflationary pressures emerging from the labour market ; and
- ◆ Regular up to date survey on sectoral labour shortages (e.g. percentage of firms experiencing labour shortages by sector).

The CSO will have to examine these additional needs, and may need to discuss some of them in more detail with the CBFSAI. In some cases, particularly those involving financial assets and liabilities, the most appropriate solution may involve some form of joint or shared work with the CBFSAI itself on collection of data, compilation of results, or both. Any additional work will, of course, need to take account of resource constraints in both institutions.

### **1.3 Examination of individual data sources**

The table below lists the CBFSAI's data holdings (including the supervisory insurance industry data) which were reviewed by the SPAR BES Team on the basis of an initial prioritisation made jointly with the CBFSAI. It is subdivided between those collected for statistical purposes and those collected for supervisory or regulatory purposes. They are also listed in Appendix 4. The other holdings included in the CBFSAI's initial listing could not be examined in detail because of lack of time, because they are confidential, or because their further statistical potential is considered to be low (see Section 1.4).

**Table 1: CBFSAI and IFSRA Data Holdings**

<b>Data Holdings Primarily for Statistical Purposes</b>	<b>Source</b>
Resident Offices Return (Monthly/Quarterly)	Licensed Credit Institutions
Interest Rate Return (Monthly)	Licensed Credit Institutions
Monthly Interest, Income and Expense	Licensed Credit Institutions
Monthly Credit Card Statistics	Licensed Credit Institutions
Maturity and Sectoral Distribution of Assets (bi-annual)	Licensed Credit Institutions
Money Market Fund Return (Monthly/Quarterly)	Money market fund administrators
Commercial Paper (Monthly)	Other non bank Financial Intermediaries
<b>Data Holdings Primarily for non-Statistical Purposes</b>	<b>Source</b>
Fund Authorisations and Net Asset Value Reporting (Monthly)	Collective Investment Institutions
Prudential Return (Monthly/Quarterly)	Licensed Credit Institutions
Annual Insurance Supervisory Return	Licensed insurance companies

The key focus of the SPAR BES Project in relation to these data holdings was to assess:

- ◆ Whether the statistical potential of the data specifically collected for statistical purposes might be expanded; and
- ◆ What statistical use is made or could be made of the data collected for regulatory and supervisory purposes.

In addressing its task, the SPAR BES Team:

- ◆ was conscious of the need to address to what extent any duplication or overlap in data collection/compilation effort on the part of both the CSO and the CBFSAI might exist - with the resulting burden on data providers and compilers, and how such duplication might be reduced or removed; and
- ◆ relatedly, tried to take into account proposed new statutory obligations on the CBFSAI and the CSO in the general field of financial statistics and the need for both organisations to jointly address coordination and rationalisation of data collection and compilation from new or expanded data sources for the financial sector.

The outcome of the Team's examination of individual data holdings is described in Sections 1.3.1 to 1.3.10. A brief reference is made in Section 1.4 to the other CBFSAI data holdings which were not examined in detail. The statistical potential of the holdings examined is summarised in Section 1.5 and the main conclusions and recommendations are given in Section 1.6.

### **1.3.1 Central Bank monthly/quarterly Resident Offices Return**

This is a key data holding of the Bank's Statistics Department. It has existed in different forms since the 1960s. Its primary use is for national and European Central Bank (ECB) statistical purposes. It consists of a number of separate but related monthly and quarterly reports.

All credit institutions (CIs), i.e. entities holding a banking licence issued by the CBFSAI, are required to file the return. Since most of them must also file several other CBFSAI statistical and supervisory data returns (the Monthly Interest Rate Return – see Section 1.3.2; the Monthly Interest, Income and Expense Return – see Section 1.3.3; and the Monthly and Quarterly Prudential Return – see Section 1.3.9) there is considerable scope for linking the resulting data holdings. The CBFSAI makes use of this facility as it considers necessary.

The data collected cover end-month balance sheet and off-balance sheet assets and liabilities. This information enables the CBFSAI to compile and publish statistics on the banking sector in Ireland and to supply the ECB with the necessary information to measure the money stock for the euro-area and to identify the counterparts to money. The monetary financial institutions (MFIs) which contribute to these monetary aggregates essentially correspond to CIs and to money market funds (MMFs) meeting certain ECB criteria. The data are collected for ECB purposes under Council Regulation 2533/98 and associated ECB legal instruments and under the provisions of the Central Bank and Financial Services Authority of Ireland Act, 2003.

Any resident entity wishing to undertake banking activity in Ireland must firstly obtain a banking licence from the CBFSAI. Once a licence is granted, a unique identification code (the MFI ID) is assigned by the CBFSAI and this along with other identification details are posted to the ECB's MFI List. This information includes the licensee's name, address and name of head office.

All licensed CIs identified on the ECB's MFI List as being located and operating in Ireland (currently 82) are statutorily required to report to the Statistics Department of the CBFSAI each month. The information requirements have been modified and greatly expanded over the years, the most recent modification dating from 1 January 2003. Within 8 days of each month end, very detailed information is collected electronically on each reporter's end-of-month assets and liabilities as recorded on its balance sheet (and including off-balance sheet items). The information is prepared by the reporters on the basis of very detailed instructions from the CBFSAI. It is categorised according to a wide range of financial instruments (e.g. equity, deposits, loans, repurchase agreements, etc). Supplementary breakdowns by original maturity, currency, country and sector of counterpart are also required, the information on the latter three categories being provided quarterly to the CBFSAI. Data on banks' reserve requirements and on off-balance sheet items (such as financial derivative contracts) are also provided. In addition, information is collected concerning the impact of end-period revaluations, reclassifications, write-offs, etc on the balance sheet positions reported. The CBFSAI can, therefore, derive transactions information for instrument categories by taking the change in balance sheet values from month-to-month, and adjusting for valuation or reclassification effects.

The classifications used in collecting these data are very detailed. For currency and country analyses and publication, the relevant categories coincide with the ISO standard classifications; for financial instruments and institutional sectors, the ESA95 standard classifications are used.



Before the returns are submitted, reporters are required to subject their data to a series of edit checks that have been pre-specified by the CBFSAI. The CBFSAI repeats these checks, and carries out some further checks. Inconsistencies are queried with the reporters. Further checking is undertaken by the CBFSAI at macro level. These checks and the rigid legal requirements underpinning the supply of the data ensure that the information is of extremely high quality.

The CBFSAI publishes an extensive amount of information from this data holding on a monthly basis with a one-month timelag in its Monthly Statistics and on a quarterly basis with a three-month timelag in its Quarterly Bulletin. More detailed data required to meet ESCB requirements are transmitted to the ECB each month. Further breakdowns by currency, country and sector are provided quarterly.

### **Assessment of expanded statistical potential**

This is a key CBFSAI statistical data holding and one which, if required, could be linked at individual reporter level by means of the MFI ID Code to other CBFSAI data holdings. The rigorous statutory compliance requirements imposed on reporters by the CBFSAI and its own in-house data checking arrangements ensure that it is of excellent statistical quality. The statistics are timely and very reliable and they are used by the CBFSAI to produce and publish a considerable range of analyses. In all, the data satisfy the purposes for which they are collected.

Factors contributing to this result include:

- (i) The national and European legal basis underpinning the data collection;
- (ii) The detailed CBFSAI instructions to reporters;
- (iii) The use of standard classifications for key analysis variables; and
- (iv) CBFSAI's rigorous data quality checking arrangements.

The potential for wider statistical use must be considered in the context of data collections of similar data by other institutions from the same reporters. The most important such collection is probably the CSO's quarterly survey of CIs. This has been conducted in its present form since 1998 to meet national and international requirements for BOP, IIP and related statistics. It is also used as an input into the compilation of Financial Accounts statistics in conjunction with the Resident Offices Return. All of the main international statistical agencies have substantial requirements in these areas (the ECB, Eurostat – a new Regulation was approved by the Council in June 2004, the IMF and the OECD). The statutory bases for the data collected by CSO are the EU Council Regulation No 2533/98, concerning ECB's statistical requirements, and the Irish Statistics Act, 1993.

The CSO's data collection covers primarily the foreign business of the reporting banks, but details of activity vis-à-vis residents are also reported by banks operating from the IFSC<sup>3</sup>. The variables reported are: transactions in the period in business services and income (e.g. interest, profits); investment and financing transactions in the period; and end-period asset and liability positions (stocks). To meet ECB and Eurostat demands for counterpart country analysis in the BOP and IIP statistics, the foreign transactions and positions have to be reported in a considerable degree of geographical detail. The instrument class breakdown reported for asset and liability transactions and stocks is relatively broad (equities, bonds, money market instruments, loans, deposits, etc).

There is therefore a very large overlap between the two datasets. However, there are also some very significant differences:

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<sup>3</sup> IFSC means the International Financial Services Centre.

- ◆ The Resident Offices Return is monthly (with additional details quarterly), whereas the CSO survey is quarterly;
- ◆ Non-IFSC banks report only their foreign business to the CSO, whereas all banks report both their foreign and resident business in the Resident Offices Return;
- ◆ The CSO survey covers both transactions and stocks for both assets and liabilities, whereas the CBFSAI returns cover only stocks;
- ◆ The level of instrument detail is much more detailed in the Resident Offices Return than in the CSO survey;
- ◆ The CSO data have no systematic breakdown by institutional sector of counterparty (households, non-financial corporates, government, other financial institutions, etc). By contrast, the Resident Offices Return data have quite a detailed breakdown; and
- ◆ It can be difficult to match specific BOP/IIP concepts, such as direct and portfolio investment with the instrument breakdown provided in the Resident Offices Return.

The information collected and compiled by the CBFSAI from the *Resident Offices Return* is already used by the CSO in a number of ways. Firstly, it serves as reference data in the compilation of the quarterly BOP and IIP statistics for the MFI sector. Secondly, it is a primary source for the monthly BOP estimates for this sector. Thirdly, in the compilation of annual and quarterly Financial Accounts statistics currently being developed jointly by the CSO and the CBFSAI, it is the primary source of data on the MFI sector itself and is also a very important source of counterpart data for the other sectors.

Although these uses are substantial and significant, the SPAR BES Team considers that there is scope for further exploiting the *Resident Offices Return*, particularly, as there is a significant amount of unpublished, but potentially useful data collected. These data are particularly relevant for Financial Accounts compilation. But, perhaps more significantly, there would seem to be scope to further use the data from the *Resident Offices Return* to generate the quarterly BOP Financial Account and IIP statistics for MFIs, ie using a more rigorous statistical derivation than the one currently used in preparing the monthly BOP statistics. Such an additional use of this information could allow the CSO to discontinue all, or part of, its data collection from banks, thereby eliminating a substantial duplication of data collection. While there might have to be some changes to and expansion of the *Resident Offices Return*, the net effect might well be a substantial reduction in and streamlining of the overall reporting burden. The SPAR BES Team recommends that the CBFSAI and the CSO should undertake a thorough assessment of the possibilities offered. They should also explore further the potential use of the *Resident Offices Return* statistics in compiling the Structural Business Statistics for the sector required by Eurostat. These requirements broadly cover annual data on numbers of enterprises and their branches, employment, balance sheet assets, income and expenses. Certain breakdowns are also required on the basis of, for example, legal status, size of balance sheet and type of institution.

### **1.3.2 Monthly Central Bank Return – Interest Rates**

This survey was established in January 2003 by the Statistics Department of the CBFSAI on foot of Council Regulation 2533/98 and associated ECB legislation (Regulation ECB/2001/18). Its purpose is to enable the ECB to compare retail interest rates for euro-denominated loans and deposits across member states of the euro area. For the purposes of the Regulation, retail rates are defined as those applying to households and to non-financial corporations as defined in ESA95.

The survey currently covers a sample of 17 CIs (ie entities holding a banking licence issued by the CBFSAI). The composition of the sample is reviewed periodically to ensure that the coverage criteria listed in the Regulation are adhered to. Using the MFI ID code, the records for the 17 reporting CIs can be linked to their *Resident Offices Return* data – see Section 1.3.1. As retail banking is concentrated among a small number of banks in Ireland, coverage in the survey is very high – above 90% for both loans and deposits.

Reporters are statutorily required to provide in electronic and hard-copy form the relevant monthly data in respect of their Irish resident offices within 12 working days of the previous month. Data on rates and volumes are provided both for outstanding stocks of loans and deposits and for new business transacted in these instruments during the reporting month. For outstanding amounts, the volumes used are taken from equivalent categories in the *Resident Offices Return*, which has 100% coverage. For new business, volumes collected are grossed to national totals using weightings from the monthly *Resident Offices Return* data. For outstanding amounts, annualised weighted average interest rates for a range of deposit and loan instruments categories are received for households and non-financial corporations in the euro area. In the case of deposits, for each of the sectors identified, a breakdown by maturity is required showing those placed for up to 2 years and those for 2 years and over. For loans to non-financial corporations, a three way maturity breakdown is required (ie less than 1 year; 1 to 5 years; and, over 5 years). The same maturity details are required concerning loans to households but the data also distinguish (a) loans for house purchase and (b) consumer credit and other loans. A more extended breakdown is required for the data reported under the *new business* category. The interest rate data does not distinguish between Irish residents and other euro area residents, but it is known that Irish business greatly dominates. All retail products offered by the responding institution must be classified to an ECB-prescribed financial instrument category.

To ensure the quality of the data, the CBFSAI provides reporters with detailed instructions for making their returns. Internal bank codes are used for each row and column on the reporting form. A series of CBFSAI pre-specified edit checks are applied at source level by the individual reporters. These checks are repeated at micro level once the data are captured in the CBFSAI's computer system and checks are also made against changes in equivalent balance sheet items on the *Resident Offices Return* (see Section 1.3.1). Inconsistencies are queried with the respondents and any necessary amendments are made. A number of consistency checks are also included at macro level in the system.

The end-month retail interest rates results for Ireland are published in the CBFSAI's *Monthly Statistics* and subsequently in its *Quarterly Bulletin*. These data distinguish existing business and new business and are categorised according to different financial instrument categories. Details of the corresponding volumes are published for all categories of new business and outstanding amounts. The data are also supplied to the ECB and are used as input into the euro-area interest rate statistics which are published each month.

### **Assessment of expanded statistical potential**

This is an important data holding for both the CBFSAI and for the ECB. It provides crucial monthly data on retail interest rates covering a number of financial instruments. The European legal basis underpinning it and the rigorous efforts made by the CBFSAI requiring reporters to return accurate and reliable data ensure that the information is of excellent quality. Notwithstanding the fact that the data cover interest rates and related amounts outstanding for the euro area only, the information produced and disseminated is very reliable and with excellent timeliness. The use of standard international classifications for key analytical variables and the possibility of linkage with other CBFSAI data holdings further

enhance the statistical potential of the information. In all, the data satisfy the purposes for which they were collected.

The CSO is currently assessing the potential use of this dataset for the estimation of several important variables for the national and non-financial sectoral accounts, namely sectoral interest income and expenditure flows, and FISIM<sup>4</sup>. Compilation of these series is required during 2005. The FISIM estimation will result in a change (increase) in the level of GDP. The interest rate data are particularly useful, as the rates collected for outstanding amounts can be associated directly with the stocks (volumes) of the corresponding assets and liabilities collected monthly in the *Resident Offices Return*. Moreover, new business volumes are grossed to national totals according to balance sheet weights. In this context, it should be noted that some Member States are already using the monthly interest rate data and the balance sheet stocks and flows from the *Resident Offices Return* (see Section 1.3.1) in the compilation of FISIM.

For Balance of Payments compilation on the existing basis, there would appear to be only limited immediate and direct further statistical use of this information. Assessment of its usefulness for Financial Accounts compilation is ongoing. However, when combined with associated information on principal amounts outstanding, the interest rate data offers significant additional potential for the other National Accounts purposes mentioned earlier (ie sectoral accounts and FISIM).

### 1.3.3 Analysis of monthly Interest Income and Expense Return

This return was introduced in the mid-1990's to meet certain CSO requirements for Balance of Payments statistical compilation. However, since the establishment of the CSO's own survey of CIs in 1998, the requirement for CBFSAI-based data in the area of balance of payments statistics has diminished. The current primary purpose of this data holding is its use for calculating financial intermediation services indirectly measured (known as FISIM) for CIs (see comments in Section 1.3.2 concerning the *Monthly Interest Rate Return*).

The information is collected under the provisions of the Central Bank and Financial Services Authority of Ireland Act, 2003. All licensed CIs identified on the ECB's Monetary Financial Institution (MFI) List as located and operating in Ireland (currently 82) are required to report. The return has to be filed within 8 working days of the end of the month. The data collected cover end-month accrued interest income and expenses from all CIs.

The information to be reported is the interest income and expense in the month, cross-classified by currency (Euro/other), residence of customer (Ireland/other) and institutional sector of customer (*MFI's, central banks, general government and non-government*). A breakdown by type of instrument is not reported nor are the corresponding principal amounts outstanding. However, respondents are instructed that the interest flows should correspond to specified totals on the *Resident Offices Return*, for the relevant sectors.

Returns are made on paper, and keyed and stored electronically by the CBFSAI. As well as providing instructions regarding the completion of the questionnaire, the CBFSAI carries out edit checks at 'micro' level on all returns. It also undertakes further plausibility and consistency checks as thought necessary at a 'macro' level against related balance sheet data on the *Residents Offices Return* (see Section 1.3.1). However, as the data are no longer required by CSO for BOP compilation purposes, quality checking of the data is less rigorous than the in-depth checking that is undertaken for other CBFSAI data (e.g. the *Resident Offices Return*). Each individual return can also be linked, by use of the ECB's

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<sup>4</sup> FISIM means financial intermediation services indirectly measured.

unique MFI ID code, to other CBFSAI statistical and supervisory data holdings relating to CIs (monthly/quarterly *Residents Offices Return* – see Section 1.3.1, *Monthly Interest Rate Return* – see Section 1.3.2 and the monthly and quarterly *Prudential Return* – see Section 1.3.9).

### Assessment of expanded statistical potential

The use of this data holding for BOP compilation has diminished over recent years following the introduction of CSO's more general data collection from CIs in 1998. The consequence of this partial redundancy of the information is that the basic data returned to the CBFSAI is not subjected to the same degree of rigorous quality checking as for other data holdings. In addition, the CBFSAI does not publish the results. It has indicated that this data source is regarded as largely redundant at this point in time, and resources have been diverted to other statistical areas. However, the SPAR BES Team has received the views of the CSO's National Accounts Division that this data holding is of considerable value and importance for the FISIM element of the National Accounts. At present, it is the main source for the current estimation of FISIM and of sectoral interest income and expense.

In this context, the CSO is required to introduce both of these developments by 2005. Experimental work on FISIM estimation, using the *Monthly Interest Income and Expense Return* data, was undertaken in 2002 and is now being reactivated more vigorously. In addition, exploitation of the *Monthly Interest Rate Return* and the *Resident Offices Return* data is now being undertaken. The CBFSAI and the CSO are of the view that exploiting the *Resident Offices Return* and the *Monthly Interest Rate Return* is probably the most appropriate method for calculating FISIM in the future. However, it is agreed that the current compilation methodology using the *Monthly Interest Income and Expense Return* will be required until new compilation procedures for FISIM are put in place.

In the context of BOP compilation, mention has been made (in Section 1.3.1) of the possibility of making increased use of the *Resident Offices Return* as a means of reducing and perhaps eliminating duplicate data collection from CIs by the two agencies (CSO and CBFSAI). The CSO believes that a similar possibility exists for use of the *Monthly Interest Income and Expense Return*, perhaps via closer integration with the *Resident Offices Return*. However, for this to happen, some modifications would have to be made to the content and breakdown of the interest return. For example, a small number of reporters do not currently comply with international statistical standards for interest flows associated with certain financial derivative products. This would need to be addressed so that standardised reporting is obtained. Even if the complete replacement of the CSO surveys should not turn out to be feasible, the CBFSAI data could still be of significant use as an important secondary source in the BOP compilation, if their quality and reliability could be improved.

In general, the usefulness of the *Monthly Interest Income and Expense Return* data for the purposes described above would be greatly enhanced if certain modifications and extensions could be made. The most important would be a further breakdown of the non-government counterpart sector into households and corporates (with, ideally, a further analysis of households by purpose – mortgage, consumption, etc). Another useful extension would be the introduction of a breakdown by financial instrument. However, the CBFSAI have indicated that most of the requirements for data classified by sector, by instrument and by purpose can be addressed from information already collected in the *Resident Offices Return* and the *Monthly Interest Rate Return*. Consequently, this should be the starting point for any consideration of the role of the *Monthly Interest Rate Return*. Any discussions between the CBFSAI and the CSO on this issue must also bear in mind the related, but not identical requirements of other statistical areas, e.g. BOP, IIP.

In considering the future status of this data holding on interest income and expense, the SPAR Team acknowledges the CBFSAI's view that in the interest of minimising the burden on respondents, it is important to fully explore the data potential of other sources, namely the *Resident Offices Return* and the *Monthly Interest Rate Return* before agreeing any future developments.

#### **1.3.4 Analysis of monthly Credit Card Statistics Return**

The *Credit Card Statistics Return* system was established in the late 1980s. Following the introduction of a new return in 1998, the CBFSAI consider that the quality of the data is much improved. The legal basis is the CBFSAI Act 2003 and the information is collected by the CBFSAI's Statistics Department. The purpose is to monitor credit card activity in Ireland. The reporting population is comprised of the six resident CIs which issue credit cards to Irish residents, so that a very high level of coverage of credit card usage is achieved. Data are not collected for credit cards issued by non-resident financial institutions. In addition, store cards<sup>5</sup> are excluded from the data.

Monthly data are collected on the number of credit cards in issue, showing the numbers in active use and in non-active use along with details on the volume of business transacted using credit cards (distinguishing personal and business use), and on payments made. In addition, details on indebtedness and interest rates are also collected. The information is requested in respect of Euro-denominated cards held by Irish residents only. These data are used primarily for analytical purposes by the CBFSAI's Statistics Department.

To ensure the quality of the data the CBFSAI issue detailed instructions on the completion of this monthly return. Reporters are required to respond within 10 working days of the reference month. The data are normally reported on paper and are keyed and stored on the CBFSAI's computer system. Data submitted in a given period are compared to the corresponding data for previous periods and inconsistencies are checked with the reporter.

The aggregates compiled from this return are published in the CBFSAI's *Quarterly Bulletin*, and in the *Monthly Statistics* from February 2005. The published table covers the series outlined above.

#### **Assessment of expanded statistical potential**

This data holding meets the purpose for which it was established. Considering the detailed CBFSAI instructions to reporters and the data quality checking arrangements along with the possibility of linkage with other internal CBFSAI data, this data holding is of high quality overall. It provides important monthly data on credit card activity, which is around 13% of consumer credit<sup>6</sup> in Ireland. Credit card debt constitutes approximately 2% of total household borrowing. The information produced and disseminated is very reliable with excellent timeliness.

From the CSO's viewpoint, this data holding may have a potential additional statistical use in the future in estimating household activity in retail markets. However, in its present form the data collection is too summary in nature and coverage is not comprehensive enough to be usable directly as a primary source in the CSO's *Retail Sales Inquiry* or *Annual Services*

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<sup>5</sup> Store cards are similar to credit cards, but their use is restricted to a single shop or chain of shops.

<sup>6</sup> Consumer credit is defined as lending to households for personal use in the consumption of goods and services, and excludes lending for housing and other investment purposes.

*Inquiry* compilation processes. Credit card data may also be useful as input into estimating tourism expenditure abroad by Irish residents. In this context, some initial work is underway at European level to investigate the potential of credit card data in estimating expenditure abroad.

Because the number of reporters is small, there may be potential for further exploring the statistical potential of this survey. In this context, Statistics New Zealand (SNZ) has started to explore the possible statistical uses of credit/debit card data in compiling official statistics. Their experiences in this initiative may be useful to the CSO.

The Team recommends that these potential uses be further examined by the CSO in consultation with the CBFSAI. Even if no enhancements are implemented, the aggregates of the survey could be used by the CSO for cross-checking purposes.

### **1.3.5 Maturity and Sectoral Distribution of Assets (BIS survey)**

This data holding has existed for many years and is maintained by the CBFSAI's Statistics Department. The aggregate results compiled by the CBFSAI are supplied to the BIS. The information is required by the BIS to enable it to determine the locations of each reporting country's consolidated lending risk in terms of the residencies of both the immediate borrower and the ultimate borrower and vis-à-vis all other BIS reporting countries.

All (82) CIs licensed to operate in Ireland currently report their information to the CBFSAI on a half-year frequency. From December 2004, reporting will change to a quarterly basis. Information for the BIS is collected under national legislation, namely the Central Bank and Financial Services Authority of Ireland Act, 2003.

The data collected primarily refer to the total foreign assets of CIs headquartered in Ireland and those CIs located in Ireland whose headquarters are situated abroad. There are different reporting requirements depending on the legal status of the reporter and the location of its headquarters. These are specified in detail in the reporting instructions supplied to CIs by the CBFSAI and these, in turn, are supplemented by detailed instructions prepared by the BIS. Where the headquarters are in Ireland, the reporter is required to provide complete information showing assets both on an immediate borrower and ultimate borrower basis. If the headquarters are located abroad then the reporting requirements are considerably reduced and refer to the immediate borrower only. The required data are prepared on a consolidated basis covering the resident and non-resident offices of the reporting unit and broken down on the basis of immediate risk and ultimate risk in terms of location i.e. of the country of residence of the borrower. Further details according to the residual maturity of the asset and the sector of the borrower are also provided.

The data are supplied to the CBFSAI within 25 working days of the reference date in hard copy, diskette or via encrypted e-mail. They are then entered on the CBFSAI's computer system and subjected to a selection of data quality and consistency checks. If considered necessary, the CBFSAI queries reporters on the information they have supplied. To assist quality checking, the CBFSAI checks aggregate results against the relevant sectoral and geographical elements of the money and banking statistics prepared for the ECB. When the data processing is completed, the current half-yearly aggregate results are sent to the BIS within 50 working days of the end of the reference period. The results are published by the BIS in its *Quarterly Review* publication. The CBFSAI does not publish any data from this inquiry nationally.

## Assessment of expanded statistical potential

While this is an important data holding in the context of CBFSAI input into the BIS databank and essentially fulfils the purpose for which intended, it is probably not a key holding for the CBFSAI's other statistical or regulatory purposes. Nevertheless, given its full coverage of the CI population, use of standard classifications for country and for institutional sector and the CBFSAI's micro and macro data quality checking procedures, the information collected and produced from this holding is of good quality as it is checked against the *Resident Offices Return* data for each reporting institution (see Section 1.3.1).

From the CSO's viewpoint and bearing in mind the excellent data available from the latter return, there would seem to be little key additional statistical potential obvious from this data holding, at least in the medium term.

While the possibility of linkage (through the ECB's MFI ID code) with other data holdings is obvious, interpretation of any linked data would have to be made with some caution, both at the micro and at the aggregate levels, because of the differences in coverage that result from differences in the reporting requirements. For example, in the case of CIs headquartered in Ireland, the BIS-related data holding includes consolidated data for the resident and non-resident offices of these reporters whereas the *Resident Offices Return* covers their Irish resident offices only. In addition, whether reporters whose head offices are located outside Ireland have to report to the CBFSAI, and what they have to report, depends on whether or not their data are included in the returns made by their headquarters to their respective national central banks. Where such consolidated reporting is undertaken in the foreign headquarters' returns, no data for the Irish resident offices are required by the CBFSAI. These differences present obvious difficulties in linking and interpreting the data from this holding with data from the other holdings. A further (although less important) difference relates to the maturity classification: the BIS data are reported on the basis of residual maturity (ie remaining time to expiry) whereas other relevant holdings use original maturity (ie the time from commencement to expiry). Looking towards the future, however, there may be some additional estimation potential for this information if the international standards for compiling certain statistical data extend to using a residual maturity basis.

### 1.3.6 Monthly and quarterly Money Market Fund Return

The *Money Market Fund Return* data holding has been maintained by the CBFSAI since January 2003. The data are collected for European Central Bank (ECB) purposes under Council Regulation 2533/98 and associated ECB legal instruments, and also under the provisions of the Central Bank and Financial Services Authority of Ireland Act, 2003. The aggregate results compiled by the CBFSAI's Statistics Department are supplied to the ECB. MMFs are considered to be MFIs along with CIs (which report to the CBFSAI for statistical purposes via the *Resident Offices Return* – see Section 1.3.1) and, consequently, the data from both sources are of great importance and interest to the ECB. The information is collected for the purpose of quantifying the contribution of MMFs to the Euro-area money supply and also to meet additional ECB requirements for money and banking statistics.

MMFs are defined as those collective investment institutions (CIIs) whose investment units are, in terms of liquidity, close substitutes for deposits, and which primarily invest in money market instruments or other transferable debt instruments with a residual maturity up to and including one year. Once CIIs meet these criteria they are designated as MMFs and are included on the ECB MFI listing. Currently, there are about 190 such funds operating in Ireland. Reporting is generally undertaken by the fund administrator or other resident service provider to the fund.



Monthly returns are made within six working days of the reference month and quarterly returns within twelve working days of the reference quarter. The CBFSAI issue detailed instructions to reporters to assist them in completing the return, including a series of edit checks. Returns are made on paper, on diskette or via encrypted e-mail. They are then entered on the CBFSAI's computer system and further editing checks are applied at micro level. Inconsistencies are queried with the reporter. Together these data control checks ensure a high level of quality in the data holding.

The monthly return consists of an analysis of the balance sheet of the MMF by type of financial instrument, cross-classified by broad geographical counterpart (3 regions: *Ireland, Other Monetary Union Countries* and *Rest of World*). Asset positions are also analysed by Euro and non-Euro currency categories.

The quarterly return supplements the monthly data by giving a more detailed geographical analysis of assets, broken down by currency, institutional sector and distinguishing individual EU countries.

The results are published in the *ECB Monthly Bulletin (Table 2.1 Aggregate Balance Sheet of Euro Area MFIs)*. The CBFSAI also publishes the results in its *Monthly Statistics* and in its *Quarterly Bulletin* as part of Ireland's contribution to the Euro area money supply.

### **Assessment of expanded statistical potential**

This is another key CBFSAI data holding which meets the purposes for which it was established and has a similar importance to that of the *Resident Offices Return* (see Section 1.3.1). Again, the stringent statutory reporting requirements imposed by the CBFSAI and its in-house data validation arrangements ensure that this holding is of excellent statistical quality. The information produced is very reliable with excellent timeliness and a considerable range of analyses are published and disseminated by the CBFSAI. In addition, the use of standard international classifications for key categorisation variables (for financial instruments, institutional sector, country of counterpart, etc) as well as the possibility to link the data with other CBFSAI data sources (e.g. concerning CII – see Section 1.3.8) enhances the potential for further statistical use of the information.

The CBFSAI's MMF data are collected primarily to meet the ECB's statistical needs and, as was stated in the case of the *Resident Offices Return* (see Section 1.3.1), any possible wider statistical use must be considered in the context of similar data available from other sources. The remarks made earlier in examining the further statistical potential of the *Resident Offices Return* also apply to this data holding.

Since 1998, the CSO has collected on a statutory basis a considerable amount of data from MMFs via its quarterly survey of CII. As already stated, this information has been required in order to enable the CSO to meet national and international (ie ECB, Eurostat, IMF and OECD) requirements for BOP, IIP and related statistics, and as an input into the compilation of Financial Accounts statistics. The data collected primarily relate to the foreign assets and liabilities of MMFs but details of activities with residents are also included. Information is required on their business services, income and investment transactions in the period as well as end-period asset/liability stock positions from their balance sheets. The data provided include a full profit and loss analysis. In addition, a considerable degree of geographical detail is obtained. The investment information also is further broken down over a range of financial instruments (equities, bonds, money market instruments, loans, deposits, etc). As is the case for the *Resident Offices Return* (see Section 1.3.1), there is a substantial overlap between the stocks data collected by the CSO for MMFs and the balance sheet data collected by the CBFSAI. Again, this latter information is used to a varying extent as reference data for input into the CSO's compilation of quarterly BOP, IIP and Financial

Accounts statistics for the MFI sector. The CBFSAI data are also used as source data for use by the CSO in compiling the monthly BOP estimates for MMFs required by the ECB.

As was suggested in the case of the *Resident Offices Return* and with a view towards eliminating present duplication in quarterly data collection, the CSO statistical requirements relating to MMFs could possibly be addressed via the CBFSAI's *Money Market Fund Return* collection system. This essentially would mean the extension of the current approach used in the compilation of the monthly BOP statistics for MMFs to quarterly compilation. However, in the case of financial investment data within the BOP and IIP statistics, an enhancement of the level of geographical detail collected by the CBFSAI for MMF activity would be required to meet European statutory demands. Additionally, data on services and income with a similar geographical analysis are required for BOP and National Accounts purposes, and this aspect would also need to be considered by both institutions.

The CBFSAI MMF data is also a key source for Financial Accounts requirements, particularly given that the CSO BOP/IIP data does not include a breakdown by the sector of the resident counterpart - an essential element in the Financial Accounts compilation.

The main conclusion from this is that an expansion of the CBFSAI information collected from the *Money Market Fund Return*, if introduced, could in principle remove or reduce the need for CSO to collect this information in its quarterly BOP/IIP surveys of MMFs. This, in a similar manner to the thinking outlined earlier for the expanded statistical use of the *Resident Offices Return*, would result in a significant reduction in the statistical response burden on MMF reporters and would also reduce the overall compilation burden. The SPAR BES Team recommends that these possibilities be examined jointly by the CSO and the CBFSAI.

### **1.3.7 Monthly report on Commercial Paper**

This data holding has been collected by the CBFSAI's Statistics Department since the late 1990's. The data are collected under the provisions of the Central Bank and Financial Services Authority of Ireland Act, 2003 to meet the statistical requirements of the BIS.

Commercial paper is a short-term debt security issued (under a special licence granted by the CBFSAI) by a non-MFI financial institution on behalf of another financial or non-financial entity. In the majority of cases the issuer is an *other financial intermediary* (OFI). The security is guaranteed by an MFI which may or may not be related to the commercial paper issuer. All non-MFI issuers of commercial paper which are supervised by CBFSAI report on the last day of the reference month their end-month positions as well as transactions during the month. Also collected are data on currency of issue, interest rate payable and bank guarantor of the paper. This data source is relatively summary in nature and, partly due to the nature of these financial instruments and the activity involved in transacting them, reporters are simply required to notify the CBFSAI whenever such transactions occur.

The CBFSAI issue instructions to reporters to assist them in completing the return and the data are reported using hard copy forms. The information is then entered on the CBFSAI's computer system and subjected to relatively basic data quality and consistency checks. If considered necessary, the CBFSAI queries reporters on the information they have supplied.

The aggregate results compiled by the CBFSAI's Statistics Department are sent to the BIS but are not otherwise published by the CBFSAI.

## Assessment of expanded statistical potential

This is a relatively summarised data holding which is maintained solely to meet the requirements of the BIS. The onus is on non-MFI issuers of commercial paper to report to the CBFSAI only if they have engaged in such transactions. Whether they do so in all cases is unclear and it is difficult for the CBFSAI to ensure compliance given the fluid nature of the activity.

The main potential use of this holding for BOP and IIP statistics is as an extra data source for the compilation of the monthly BOP statistics (ie for *money market instruments* within the category *debt securities*). The CSO's quarterly BOP collection system explicitly includes this type of information but in a more aggregate form than that required by the CBFSAI, ie detailed maturity and currency information is obtained by the CBFSAI. The CSO could explore with the CBFSAI whether it might be feasible to use the CBFSAI data as a means of cross-checking against this quarterly CSO data.

The potential use of this data holding in the compilation of Financial Accounts has not yet been fully assessed. The SPAR Team therefore recommends that the potential usage of commercial paper data for BOP/IIP and Financial Accounts purposes should be jointly investigated by the CSO and the CBFSAI.

### 1.3.8 Monthly Return of Net Asset Value of Collective Investment Institutions

The Monthly Return of Net Asset Value was introduced in the late 1980s and covers CIIIs including the MMFs which are also covered by the *Monthly and Quarterly Money Market Fund Return* already described in Section 1.3.6. CIIIs are financial enterprises such as mutual funds and unit trusts which engage in investing the pooled funds of a large number of investors. This return, which is maintained by the Financial Institution and Funds Authorisation Department within the CBFSAI, is not operated primarily as a statistical return. The data collected are used principally for supervising and regulating the funds industry, thereby protecting the interests of the investors. The information is collected under the provisions of the Central Bank and Financial Services Authority of Ireland Act, 2003, as a national requirement under relevant funds legislation (mainly EU UCITS Directives).

Currently, there are about 3,700 individual funds and sub-funds, including 190 MMFs, authorised by the CBFSAI. An individual return is required for each fund. The CBFSAI's instructions to reporters include a series of edit checks to be completed before the return is submitted. The data are supplied on paper, on diskette or via encrypted e-mail, within 10 working days of the end of the month. The data are then entered on the CBFSAI's computer system and subjected to a series of data quality and consistency checks. If necessary, the CBFSAI queries reporters on the information they have supplied.

The data reported are:

- ◆ The total net asset value of the fund at the end of the reference month;
- ◆ The total number of fund units in issue at the end of the month; and
- ◆ The number and value of subscriptions into the fund and redemptions from it during the month.

The reported values are broken down by currency.

While the data are essentially collected for regulatory purposes some statistical information is compiled and disseminated by the Financial Institution and Funds Authorisation Department. The aggregate results showing total end-of-month aggregate net asset value for all authorised funds, and the names of funds authorised are published on the IFSRA website. Data are also supplied to the CSO for use in compiling the monthly BOP statistics required by the ECB and as reference data for CSO's quarterly BOP and IIP compilation.

### **Assessment of expanded statistical potential**

The CBFSAI are satisfied that the data collected satisfy the supervisory purposes intended. Notwithstanding its main supervisory and regulatory uses, this data holding is an important source of statistical data within the CBFSAI on the activities of CIIIs. There is a strong national and European legal basis underpinning the collection of the information and the monitoring of the activities of the entities supervised. Given the increased statistical use of the data over the last two years or so, particularly for CSO monthly BOP compilation purposes, the timeliness and quality-checking of the returns have improved significantly. Using the CBFSAI's unique in-house ID codes, the information on the MMFs from this source can also be linked with the corresponding CBFSAI data for these entities under the *Monthly and Quarterly Money Market Fund Return* (see Section 1.3.6). In addition and despite the limited amount of information collected by the CBFSAI for CIIIs generally, it is also possible to compare its data with the quarterly data collected by the CSO to meet BOP, IIP and Financial Accounts needs. Overall, the CBFSAI information produced from this source has improved significantly in terms of quality and timeliness over the last year or so.

The main current CSO use of the data is for the compilation of the portfolio investment element of the monthly BOP statistics, particularly for funds (including MMFs). However, because the data are not very detailed, the estimation procedures used by the CSO are necessarily rather crude. Several enhancements might be considered. The most useful would be an analysis of assets by instrument class (equities, bonds, etc). A geographical breakdown of assets and of liabilities would also be useful. Finally, to improve the quality of the transactions estimates, some means of improving the reconciliation of the asset/liability transactions and stocks would be very desirable. It is acknowledged that these demands would be very burdensome unless the information could be generated automatically from data providers' systems. In any event, arrangements for future data collection from mutual funds will, of necessity, be driven by the latest ECB proposals to improve statistics for OFIs. A new ECB regulation will oblige the CBFSAI to collect quarterly balance sheet data for OFIs, of which collective investment schemes are a major component. Any discussions between the CBFSAI and the CSO on possible future compilation arrangements will need to take place within this context.

The other main potential use of the net asset value data is for quarterly and annual Financial Accounts currently being developed. Since monthly Financial Accounts are not being contemplated, the shortcomings identified in the context of BOP use are much less relevant. The quarterly data directly collected by the CSO are therefore likely to be the primary source for Financial Accounts, at least in the short term. However, the absence in the CSO data of a breakdown by institutional sector of resident investors is a serious shortcoming (as is, to a lesser extent, the similar absence of a breakdown by sector of issuer of resident assets held by the CIIIs). If enhancements of the monthly CBFSAI Net Asset Value statistics are being examined by the CBFSAI and the CSO, the possibility of capturing the Financial Accounts breakdowns should also be considered. However, it is not practical to make concrete proposals at present, as Financial Accounts requirements for CIIIs should largely be met by the new OFI regulation referred to earlier.

It is most likely that the new OFI return will also overlap to a significant degree with the quarterly BOP returns collected by CSO. The CSO and CBFSAI will, therefore, need to

assess the BOP and OFI returns in the context of avoiding duplication and of minimising the burden on data providers and on collectors/compilers. The SPAR BES Team recommends that this matter should be given the highest priority by both institutions.

Finally, international organisations such as the OECD and other analysts are showing increasing interest in collective investment statistics classified by asset type (equity; bond; property, etc) and/or by investment policy (income; growth; balanced, etc). The possibility of classifying the CBFSAI and/or the CSO statistics in this way should be explored in the discussions referred to above.

### **1.3.9 Monthly and quarterly Prudential Return**

This is a long-standing key data holding of the CBFSAI's Banking Supervision Department. The information is collected on its behalf by the Statistics Department under CBFSAI and EU banking supervision legislation concerning risk exposure, capital adequacy, etc. The data holding consists of very detailed monthly and quarterly balance sheet and off-balance sheet data for each reporting entity. The full population of such entities is covered but, under the legal requirements, branches of foreign banks headquartered in other EU countries are not required to provide returns.

While there is considerable overlap between the type of data collected on the *Resident Offices Return* (see Section 1.3.1) and that from returns required for prudential supervisory purposes, there is a significant difference in coverage due to the requirement for consolidated reporting for the latter. All resident CIs, currently 82 in number, whether incorporated in Ireland or operated as branches of banks incorporated elsewhere, submit information under the *Resident Offices Return*, and the reported data relate, as the name implies, to Irish-resident units only.

For the prudential returns, on the other hand, CIs which are branches of EU banks are not required to report. Among CIs incorporated in Ireland, a further distinction is made. Those which are the parent companies of banking groups (currently nine) are required to make both monthly and quarterly reports. The remainder make monthly reports only.

The content and coverage of the monthly and quarterly prudential reports are also different. Firstly, for incorporated entities with no subsidiaries, the portion of the monthly report that corresponds to the monthly *Resident Offices Return* does not have to be filed, as the CBFSAI is able to extract the appropriate data from the latter return. Secondly, for entities with only non-bank subsidiaries, only the monthly prudential return is completed, and the return covers the reporting unit's resident and non-resident offices and its non-bank financial subsidiaries. Thirdly, banking groups headquartered in Ireland (currently nine in number) must make a quarterly prudential return in respect of the group in addition to monthly prudential and monthly *Resident Offices Return* data for each credit institution within the Group. The coverage of the quarterly return is expanded to include all the reporter's resident and non-resident offices and bank and non-bank subsidiaries.

Returns must be filed on paper and in electronic format. Monthly returns are due within 15 working days of the month-end and quarterly returns within 20 working days of the quarter-end.

The prudential data are captured electronically in a standard format and subjected to rigorous data quality checking. If particular concerns arise within the CBFSAI, regulators query the reporter about the return. In addition, audits are carried out on an ongoing basis. This type of in-depth data quality checking is facilitated through the use of the ECB's MFI ID Code (and banking group codes where relevant) whereby statistical and supervisory

information held by the CBFSAI from a number of separate but related monthly and quarterly reports can be linked together or at least reviewed or compared (e.g. the *Resident Offices Return* – see Section 1.3.1, the *Monthly Interest Rate Return* – see Section 1.3.2, the *Monthly Interest, Income and Expense Return* – see Section 1.3.3. and the *Money Market Fund Return* – see Section 1.3.6).

The data provide the CBFSAI's Banking Supervision Department with a prudential analysis of the entity's financial assets and liabilities, including financial derivative and repurchase agreement contacts, and also gives details of risks associated with its banking book and trading book transactions, along with analyses of currency risks and capital adequacy. Apart from annual bank profitability statistics drawn from the prudential data and supplied to the OECD, there is no aggregation of the data and no other statistical use is made of the information within the CBFSAI. It is used specifically by the CBFSAI to monitor the performance of reporting banks.

Because of the sensitive nature of the prudential information and the purposes for which it is collected, the CBFSAI does not publish or disseminate any information from these returns. Moreover, the requirements for consolidated reporting and the inclusion of non-resident and non-bank subsidiaries means it is not possible to aggregate the data to provide meaningful statistical totals (unlike the situation for the *Resident Offices Return* data).

### **Assessment of expanded statistical potential**

This data holding is of vital importance to the CBFSAI in its banking supervision role concerning the financial stability of the overall banking system. It is of exceedingly high quality given the legal compliance requirements for reporters and the rigorous data validation and reliability checking undertaken within the CBFSAI. In this latter context, the data are checked by the CBFSAI for internal consistency within the return and for compatibility with the information returned at individual reporter level in the *Resident Offices Return*. Further, although possibly less important, data linkage can also be established via the MFI ID Code with individual data returned for the *Monthly Interest Rate Return* (see Section 1.3.2) and the *Monthly Interest Income and Expense Return* information (see Section 1.3.3). In all, the CBFSAI is satisfied that this major data holding fulfils its monitoring requirements in the area of individual banking supervision and overall maintenance of a stable banking and financial system in Ireland and within the European Monetary Union context.

There has been very limited use by the CBFSAI of this data holding for statistical purposes up to now; the data have been used essentially for regulatory purposes. Given the requirements for consolidated reporting by respondents and the variation in coverage required from reporting entities, any potential statistical use of aggregated data would appear to be very limited and perhaps non-existent. In addition, the very sensitive and confidential nature of the data submitted to the CBFSAI, suggests that access by external institutions such as the CSO to the individual data is currently not legally permissible.

However, the comments made earlier regarding the potential use of the *Resident Offices Return* data (see Section 1.3.1) in the compilation of BOP and IIP statistics for the MFI sector may possibly apply to the prudential data. Accordingly, the SPAR BES Team recommends that the CSO and the CBFSAI jointly investigate possible uses of the *Prudential Return* in areas where some data potential may exist – for instance, foreign direct investment statistics for the MFI sector or for Financial Accounts.

The SPAR team also recommends that any examination should assess whether the data requirements for the EU Structural Business Statistics concerning CIs (which are currently addressed by the CBFSAI) might also be sourced from the *Prudential Return*, especially as enterprise coverage is the same for both (ie under the *home country* concept) – see also

Section 1.3.1. The CBFSAI, however, believes there is little or no extra statistical potential in the *Prudential Return* data, beyond that already available in the *Resident Offices Return*.

### **1.3.10 Annual Insurance Supervisory Return**

This long-standing data holding was formerly managed and administered by the Department of Enterprise, Trade and Employment. Statistical results were published in the *Insurance Annual Report* (the “Blue Book”). Responsibility for supervising the insurance industry, and for collection and compilation of the relevant statistics was transferred on 1 May 2003 to the Insurance Supervision Department of the CBFSAI. Its first statistical publication, with results for 2003, was issued in October 2004, now re-titled the “*Insurance Statistical Review*”.

The required information is collected under the relevant Irish and EU legislation concerning insurance supervision in relation to solvency, risk exposure, and the protection of the interests of policy holders. The data holding currently consists of very detailed annual (and, in some cases, quarterly) data covering: premiums and claims, investment income, gains and losses and expenses, profit/loss items, balance sheet assets and liabilities, claims/settlement analysis for motor, marine, aviation and transit insurance, employer liability and public liability, employment, etc. Much of the information provided is analysed in considerable detail. For example, premium income is subdivided into single premiums and regular premiums; assets are subdivided into detailed asset classes (e.g. fixed interest securities, variable interest securities, listed shares, non-listed shares, units in unit trusts and mutual funds, loans, mortgages); liabilities are shown but with less detail than for assets; and there is a breakdown for some of the information between Irish and foreign business. Data on life assurance are analysed by policy type (life assurance; general annuity; pensions; permanent health and capital redemption, etc).

The coverage of the reporting system is specified in the relevant EU and national legislation. Entities required to report are: companies incorporated in Ireland, and the Irish branches of non-EU companies, holding an IFSRA licence to provide insurance services to either residents or non-residents. All are required to file annual reports, and some also make quarterly reports. Companies authorised (under the European “freedom to provide services” legislation) to provide insurance services to Irish customers on a cross-border basis are required to register with IFSRA but are not required to file returns.

Irish branches of EU insurance companies are not required to report. Nevertheless, they do so on a voluntary basis. However, the information requirements from these entities is not as comprehensive as for those formally obliged to report, being limited to premiums, claims, commissions paid and management expenses.

The CBFSAI maintains a list or register of all authorised insurance entities and this is updated on an ongoing basis. Each entity is assigned a unique identification code which is solely used in-house. While information on the location of ownership is obtained it is not captured on the computer system. In 2003, 51 life insurance companies and 127 non-life insurance companies were covered by the system. From a statistical viewpoint it is important to note that companies headquartered in Ireland report not only for the Irish based activity but also for the business of their branches abroad (where these entities do not hold a locally issued licence in their own right). Captive insurance companies operating in Ireland are included in the system. These generally provide non-life insurance services to their affiliates but their business is not necessarily confined to related companies. Reinsurance companies have not to date been required to report although there is some likelihood that they will be required to do so at some time in the future.

Returns must be made both on paper and in electronic format. The reporting deadline is six months after the end of the reference year. Reporters are provided with detailed instructions on the information required and the standard of completion of the forms is very good. There is no non-response and there are no missing data. The information is audited at company level prior to submission to the CBFSAI. Once available, the key information of interest is captured electronically in a standard format and subjected to rigorous data quality checking. If any material concerns arise, the CBFSAI queries the reporter.

The data supplied broadly provide the Insurance Supervision Department with an analysis of the entity's financial assets and its liabilities to policy holders. The information also gives details of underwriting risks and the adequacy of provisions for existing and possible claims.

Unusually for a statistical publication, the *Insurance Statistical Review* gives individual figures for each company, as well as the more normal summaries and aggregates. Apart from publishing the results nationally, the CBFSAI provides the CSO with relevant data for the insurance industry which it in turn passes on to Eurostat to meet the European Structural Business Statistics requirements. The data supplied essentially cover broad indicators such as the number of enterprises (by type of activity, e.g. life/non-life business), gross premiums written, investments by the insurance enterprise classified by type of investment.

### **Assessment of expanded statistical potential**

This key data holding is very important for the CBFSAI in enabling it, as supervisor and regulator, to monitor the activities of the insurance industry and thereby to fulfil its obligations to protect the interests of resident and non-resident policy holders. Because of the strict legal reporting requirements imposed on insurance companies and the pre- and post-delivery quality checking of the data, the information returned to and published by the CBFSAI is of excellent statistical quality in the context of the purposes for which the data are collected and the scope and coverage of the reporting system.

The data are however not sufficiently comprehensive to meet fully the CSO's statistical requirements in the areas of business statistics, BOP and IIP statistics, National Accounts and Financial Accounts statistics. This is because the scope and coverage dictated by the legislation results in some insurance activity undertaken in Ireland not being measured. Furthermore, the annual frequency means that they are of only limited value for quarterly statistics. Nevertheless, the CSO does make extensive use of the data in some of the domains mentioned.

There is a substantial overlap, but also substantial differences, between the data collected by the CBFSAI and that collected by the CSO. The CSO's surveys, introduced in 1998 mainly to meet BOP and IIP needs, are quarterly. The emphasis is on business vis-à-vis non-residents (i.e. principal business and reinsurance). Business vis-à-vis residents is covered only for those insurers whose primary focus is foreign (essentially the IFSC companies). There are also several substantial differences in the instrument analysis of the investment portfolio, and it is not clear if the functional analysis required for BOP and IIP (*direct investment; portfolio investment; financial derivatives; and other investment*) can be extracted for the CBFSAI holdings. In addition, a country breakdown of non-resident business and assets is not collected in the CBFSAI system.

The CBFSAI has indicated its intention to improve the usefulness of this data holding for both supervisory and for statistical purposes by increasing the frequency of both collection and publication from an annual to a quarterly basis for all reporters. In addition, there may also be some expansion of the data requirements. In the meantime, the CBFSAI is continuing its efforts to improve the timeliness of the compilation and publication of the annual data.



The SPAR BES Team recommends that the CSO be involved in the proposed developments from the viewpoint of possible enhancement of the statistical potential of the insurance data collected by CBFSAI.

As is the case for other financial enterprises, the issue of data collection overlaps from the insurance industry by different state bodies naturally arises. It is likely that the statistical requirements of the CSO combined with the regulatory and statistical requirements of the CBFSAI present a significant reporting burden to the companies involved. The SPAR BES Team recommends that this issue should be addressed jointly by the CSO and the CBFSAI and that any examination of the options also take account of future developments. At present, it is difficult to see how any collection duplication which currently exists might be materially alleviated (if at all) as it is likely that the same volume of data would be broadly required to satisfy all the identified needs regardless of which organisation might collect the data. However, any intended expansion of data collection should avoid duplication or overlap to the greatest extent possible. This could possibly result in one organisation collecting data to meet both organisations' needs or, alternatively, some form of shared arrangements between the two organisations for collection and compilation.

#### 1.4 Other data sources

The CBFSAI already analyses its own data holdings with a view to developing time-series for statistical and policy purposes. It collects some other primary data and also acquires data compiled by other organisations. The CBFSAI is currently developing a database of financial asset and liability information to meet its compilation needs for quarterly Financial Accounts. This database brings together in a single location many of the key internal data holdings described in the document. The time-series developed to date are coded in line with international statistical standards (ESA95) and further analysed to identify relationships between data for different sectors of the economy (counterpart analysis). Financial holdings and transaction statistics by counterpart sector are already being derived. These derived statistics will be central to the compilation of quarterly financial accounts within the CBFSAI and annual financial accounts within the CSO.

For other primary data, in many cases the data sources are very specific in scope and purpose. While the information in a number of cases is supplied to the CSO (or to other bodies) by the CBFSAI, the data holdings concerned were not specifically examined as part of this SPAR BES Project. Such holdings include (but are not limited to):

- ◆ The CBFSAI's external reserve assets data as well as other CBFSAI data on its own account assets and liabilities (including the ECB TARGET<sup>7</sup> balances vis-à-vis other EU national central banks) and associated income flows;
- ◆ Monthly and quarterly housing mortgage finance statistics and associated monthly data on mortgage securitisations. The housing finance data are collected by the CBFSAI on behalf of the Department of the Environment, Heritage and Local Government (DoEHLG);
- ◆ Information obtained by the CBFSAI on the registered holdings of Irish Government issued securities;
- ◆ CBFSAI data on the shipments of Euro banknotes;

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<sup>7</sup> TARGET is an interlinked payments system for the 25 EU Member States and the European Central Bank (ECB) through which large-value cross-border euro payments are made, including those arising from monetary policy actions.

- ◆ Information collected biennially by the CBFSAI to meet BIS requirements for country data on financial derivative activity;
- ◆ Data provided to the CBFSAI by the National Treasury Management Agency (NTMA) concerning: transactions in Prize Bonds and exchequer bills and notes; breakdown of Government Debt; Long-term Interest Rates; and
- ◆ Savings data from An Post.

There was insufficient time for the SPAR BES Team to examine these sources but, in any event, they were considered not to be particularly important in the context of the main focus of the SPAR BES Project, namely, the assessment of their enhanced statistical potential in the area of business and economic statistics.

## 1.5 Statistical potential

The following broad assessment distinguishes two scenarios. The first (Section 1.5.1) concerns what expanded statistical use of the CBFSAI data holdings examined might be feasible in an immediate or short-term sense ie without any major changes necessary to the existing data collection arrangements but, perhaps, with some additional data exchange where feasible. The second (Section 1.5.2) focuses on the wider issue of the longer term rationalisation of data collection and statistical compilation of both the CSO and the CBFSAI, and the need for duplication or overlaps between the two organisations to be eliminated to the extent possible.

### 1.5.1 Immediate statistical potential

The CSO SPAR BES (CBFSAI) Team examined the ten CBFSAI data holdings listed in Table 1 and described in Section 1.3. In broad terms, these sources exist to fulfil statistical and/or supervisory demands primarily arising from within the CBFSAI in the context of the CBFSAI's national and international roles described in Section 1.1.1. A large volume of monthly, quarterly and annual statistical results are published by the CBFSAI from these sources and a considerable amount of information is also supplied to the ECB. Smaller amounts of data are also supplied by the CBFSAI to the BIS, the IMF and the OECD.

Having examined the holdings in detail, it was obvious to the SPAR BES Team that all of the key sources are designed primarily to meet statistical and supervisory requirements which are very specific to the CBFSAI. Purely in terms of their current statistical use, and given the CBFSAI's very strict reporting and data validation arrangements, six of the key data holdings are clearly of very good or excellent quality. These are: the *Resident Offices Return*, the *Monthly Interest Rate Return*, the *Monthly Credit Card Statistics Return*, the *Money Market Fund Return*, the *Monthly Return of Net Asset Value* and the *Annual Insurance Supervisory Return*. Consequently, the Team had no technical suggestions to make regarding their improvement for current statistical use. Moreover, given the specific purposes for which they were established, it is difficult to envisage the aggregate results from these holdings, in their current form, having a materially wider statistical use beyond that which they currently satisfy in both the CBFSAI and the CSO. The SPAR BES Team believe that the comparison of CBFSAI and CSO data at individual reporter level would be extremely beneficial to CSO for the purposes of compiling BOP, IIP, and possibly for compiling annual Financial Accounts statistics. This would only be possible, however, if any legal and confidentiality issues regarding the exchange of data can be addressed.

The SPAR BES Team's assessment of the other four holdings is as follows.

The *Monthly and Quarterly Prudential Return* (Section 1.3.9) for CIs is viewed by the CBFSAI as crucially important. At present, it is however used almost exclusively for supervisory and regulatory purposes by the CBFSAI. The only statistical result currently compiled from the return is the annual Bank Profitability report to the OECD. Given the legal reporting requirements, which dictate the enterprise and information coverage, it would not be possible to produce meaningful aggregate statistics from the data collected. Also, because of the very sensitive nature of the data at individual reporter level, use of the information by other institutions such as the CSO for the purpose of checking consistency and compatibility with its own data, might not be legally permissible.

The *Monthly Interest Income and Expense Return* (Section 1.3.3) for CIs was established some years ago solely to meet CSO requirements for balance of payments purposes. Since then and following the introduction of the CSO's own financial enterprise survey system, this data holding had been seen as becoming somewhat redundant in terms of its original purpose. However, it may now have important statistical uses in the non-financial national and sectoral accounts, as a primary source in the estimation of interest income and FISIM. A number of possible enhancements have been identified which could greatly increase its usefulness for these purposes, and might also lead to its becoming an additional source for BOP investment income statistics. The CBFSAI and the CSO believe, however, that deriving FISIM statistics from the existing *Resident Offices Return* data and from the *Monthly Interest Rate* data is probably a more logical and efficient approach for the future.

The remaining two sources examined, i.e. the *Maturity and Sectoral Distribution of Assets* (Section 1.3.5) and the *Monthly Report on Commercial Paper* (Section 1.3.7), exist purely to satisfy non-European statistical requirements, specifically those of the BIS. The first is very useful to the BIS for the purpose intended ie giving a maturity and sectoral breakdown of the foreign assets of the CIs covered. However, it would appear to have very limited potential for an expanded statistical use because of the statistical constraints imposed by consolidated reporting. The statistical potential of the second holding (non-bank transactions in commercial paper, Section 1.3.7) beyond its present use as a source for statistics for the BIS has not yet been fully explored. In its present form, it has some uses for monthly BOP compilation and may also be of use for Financial Accounts.

## **1.5.2 Towards greater statistical rationalisation**

The comments above largely relate to the potential expanded statistical use of the existing data holdings *in their present form*. In the detailed commentaries on the individual data holdings, several references have been made to the data collected by the CSO from enterprises which also report to the CBFSAI. The CSO undertakes this collection and compilation role in order to meet national and international requirements for BOP, IIP, National Accounts and Financial Accounts statistics. Considerable duplication or overlap has been identified, and the possibility of significantly reducing the reporting burden on data providers has been signaled. This could be achieved by having the data reported only once, either via expanded reporting to one institution or separate but non-overlapping reporting to both institutions.

This is particularly relevant in the case of the assets and liabilities of the MFI sector (CIs and MMFs). The relevant CBFSAI holdings are the *Resident Offices Return*, the *Monthly and Quarterly Prudential Return* and the *Money Market Fund Return*. In their present form, two of these (ie the *Resident Offices Return* and the *Money Market Fund Return*) are already primary sources for Financial Accounts statistics for the sector, in conjunction with CSO surveys. The possibility of using the *Prudential Return* for Financial Accounts purposes, as an additional (possibly supplementary) source could be explored jointly by the CBFSAI and

the CSO, if all the requisite information is not available from other sources (primarily, the *Resident Offices Return*).

Likewise, for compilation of the quarterly BOP investment flows and IIP statistics for the sector, it might be possible to achieve a significant elimination of duplication, by bringing about an appropriate amalgamation of the information from the relevant CBFSAI reports, together with an expansion of the geographical detail in the *Money Market Fund Return*. This could eliminate the need for the CSO to collect the asset and liability information from these reporters. This approach to BOP/IIP compilation for the MFI sector would, in essence, be similar to (but, of course, much more detailed than) that currently adopted in the CSO's compilation of monthly BOP statistics for the ECB, whereby the CBFSAI's banking statistics are the main input source for the MFI sector estimates.

A similar possibility exists in respect of the investment income flows of the MFIs. This needs to be examined jointly by the CSO and the CBFSAI. For National Accounts and FISIM purposes, the *Monthly Interest Rate Return* (see Section 1.3.2) - in conjunction with the *Resident Offices Return* (see Section 1.3.1) - and the *Monthly Interest Income and Expense Return* (see Section 1.3.3) are likely to serve as primary data sources, if the required information cannot be sourced elsewhere. Should this materialise, some enhancements of the content and breakdowns, which would be of value in any event for National Accounts and FISIM, might also allow these holdings to be used as primary sources for the interest element of the BOP income flows for the MFI sector<sup>8</sup>, thus allowing the CSO to discontinue those elements of their surveys also. While not connected to balance sheet data or to related interest flows, the issue of collecting sales and purchases of financial and business services, and requirements for non-financial sector accounts would have to be considered under any modified data collection arrangements discussed between the CBFSAI and the CSO.

Moreover, an expanded data holding on MFIs may enable the CSO to meet Eurostat's current and future mandatory Structural Business Statistics requirements for CIs.

In the case of CIs other than MMFs, a relatively small amount of data overlap occurs at present between the CBFSAI information collected in the *Monthly Return of Net Asset Value* (see Section 1.3.8) and the extensive data collected quarterly by the CSO. This is probably necessary and unavoidable in the current circumstances. In fact, the SPAR BES Team's view is that, in the context of improving the quality of the CSO Monthly BOP portfolio investment estimates for ECB purposes, some expansion of the content of the monthly return would be very desirable. Suggested additions are an analysis of assets by instrument class, analyses of assets and liabilities by currency, and some means of improving the reconciliation of the asset/liability transactions and stocks. Because this list is quite extensive, the possibility of restricting these additional monthly requests to the more important administrators might be worth considering. However, it is not feasible at present to make concrete recommendations on data collection options concerning collective investment schemes, until the full requirements from the impending ECB OFI Regulation are known.

The *Monthly Credit Card Statistics Return* provides important monthly data on credit card activity in Ireland. This is a relatively minor element of total household credit and is used by the CBFSAI in its analysis of domestic credit developments.

This data holding may, however have some additional potential uses:

- ◆ As an indicator of household activity in retail markets;

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<sup>8</sup> The use for BOP income estimates will be limited, however, when the ECB introduce the requirement to calculate income flows on a security-by-security basis for portfolio investment assets and liabilities.

*However, should this be contemplated, it is likely that a considerable amount of additional data would be required from the CBFSAI to enable its use in the CSO's Retail Sales Inquiry or its Annual Services Inquiry compilation processes;*

- ◆ As an input into the estimation of household borrowing in the compilation of Financial Accounts; and
- ◆ As an input into estimating tourism expenditure abroad by Irish residents.

In addition, the survey aggregates could possibly be used as an indicative measure of changes in the levels of credit card use for cross-checking the CSO's statistics on retail sales, and services.

The SPAR BES Team recommends that the CSO, in consultation with the CBFSAI, should examine whether there are any possibilities for using the credit card data for statistical purposes and it should keep the CBFSAI informed of any similar uses of these data by other statistical compilers. Should any uses be identified, the CSO and the CBFSAI should jointly examine the feasibility of such usage in the Irish statistical context.

The Annual Insurance Supervisory Return fulfils both statistical and regulatory purposes and the statistical results published by the CBFSAI meet specific and well defined demands. However, in the context of National Accounts, BOP-related and other CSO statistical domains, the particular enterprise scope and data coverage defined under the reporting requirements result in the statistical information collected and published being unusable as a primary aggregate source to measure total insurance activity conducted specifically in Ireland. Also, the fact that information on the country breakdown of non-resident policy holders or other counterpart transactors is not currently collected, limits the further statistical potential of the data for BOP and Financial Accounts purposes. For non-financial accounts, investment income derived from insurance technical reserves is attributable to policy-holders, although legally routed to the companies themselves. Nor is it possible to obtain a functional breakdown (ie direct investment, portfolio investment, financial derivatives, and other investment) of the investment data from the CBFSAI source. As it stands, the CSO needs to conduct separate statutory surveys of the insurance sector to obtain the data it requires. However, as indicated earlier, the individual data collected by CBFSAI would be of additional use to the CSO in a more immediate sense as a secondary source for quality checking its own data at individual entity level – provided there were no legal obstacles to CSO's accessing the data.

Notwithstanding the difficulties mentioned above, the usefulness of the data within the context of its present purposes should be significantly enhanced when the CBFSAI increases the frequency to a quarterly basis and even more so if an expanded range of data requirements is introduced. Whether such expansion might cover the additional functional investment data referred to or whether a geographical dimension could also be included would have to be considered by both the CSO and the CBFSAI. Up to now, it is likely that the statistical requirements of the CSO combined with the regulatory and statistical requirements of the CBFSAI have presented a significant reporting and cost burden to the companies involved. As is the case for other financial enterprises, the duplication of data collection by different state bodies needs to be addressed to determine whether any rationalisation is possible. The SPAR BES Team recommends that the CSO and the CBFSAI jointly assess the short term and the longer term options in this regard. In the case of the insurance industry, however, it is difficult to see, however, how the reporting burden might be materially alleviated, if at all, as it is likely that the same volume of data would be broadly required to satisfy all of the identified needs regardless of which organisation might

collect the data or whether partial collections by both organisations might turn out to be a more feasible and efficient option.

As an additional overall comment, the SPAR BES Team considers that any rationalisation of existing or future data collection and compilation arrangements should naturally take account of any known or likely statistical developments for the whole financial sector. In particular, serious consideration must be given to the implications of the establishment by the ECB of its Centralised Securities Database (CSDB) and to its requirements for the introduction at national level of data collection on an individual security basis for statistical purposes. While this initiative currently (and statutorily) focuses on the compilation of portfolio investment statistics for BOP and IIP statistics, it may in future extend to other statistical domains as well (e.g. statistics concerning MFIs and OFIs). While it would be premature at this point to anticipate what the future statistical requirements in these domains might be, there is a need to minimise the burden on data providers and compilers of parallel data demands for different purposes.

## **1.6 Overall conclusions and recommendations**

### **1.6.1 Conclusions**

The CSO SPAR BES (CBFSAI) Team examined ten important CBFSAI data holdings and concluded that:

- 1.6.1.1 Six of its key data holdings<sup>9</sup> are of excellent quality from a statistical viewpoint, in terms of accuracy and reliability and in the context of the purposes intended;
- 1.6.1.2 The statistical results from these six sources are compiled to an appropriate frequency (variously monthly, quarterly and annual);
- 1.6.1.3 The publication/dissemination timeliness of the key statistical results ranges from excellent to good;
- 1.6.1.4 These six holdings meet the statistical requirements of the CBFSAI for which they were established;
- 1.6.1.5 In their present form, the holdings probably have only rather limited additional statistical potential, in any aggregated form, beyond their current CBFSAI and CSO uses. This is because the purposes for which they were established are very specific to the roles and policy needs of the CBFSAI ; and
- 1.6.1.6 The micro-data, subject to any legal constraints on confidentiality (i.e. individual reporter data), may have a very useful additional statistical purpose in assisting the CSO to improve statistical data quality.

The Team also concluded that:

- 1.6.1.7 The two data holdings<sup>10</sup> maintained by the CBFSAI for meeting the statistical requirements of the BIS probably have limited additional statistical potential in an aggregate sense and as a primary source in the context of the CSO's statistical

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<sup>9</sup> The Resident Offices Return, the Monthly Interest Rate Return, the Monthly Credit Card Statistics Return, the Money Market Fund Return, the Monthly Return of Net Asset Value and the Annual Insurance Supervisory Return.

<sup>10</sup> The Maturity and Sectoral Distribution of Assets Return and the Monthly Report on Commercial Paper Return.

production role. Nevertheless, they could have applications as additional sources in the CSO's quality checking or estimation of additional breakdowns within its own compilation systems;

- 1.6.1.8 The *Monthly and Quarterly Prudential Return* is currently little used for statistical purposes, and the potential for such use seems rather small. Nevertheless, subject to any legal constraints on data confidentiality which may apply, the further potential of this data source should be investigated by the two organisations, particularly if the required information cannot be obtained from other sources;
- 1.6.1.9 The *Monthly Interest Income and Expense Return* is an important source for National Accounts at present and it was agreed it should remain so unless and until another effective source of the information is acquired. It may also be a useful source for BOP and Structural Business Statistics purposes. However, the CBFSAI believe that full exploitation of the *Monthly Interest Rate Return* and the *Resident Offices Return* may render the *Monthly Interest Income and Expense Return* largely redundant;
- 1.6.1.10 There is an increasing level of co-dependence between the CSO and the CBFSAI in the area of national and international economic and financial statistical requirements. Both organisations interact with and place significant reporting demands on financial enterprise reporters. There is significant duplication or overlap in data collection and in some aspects of statistical compilation. There would appear to be significant scope for rationalisation of the data collection and production processes, leading to a reduction in the burden and costs for both reporters and compilers. As such, both institutions need to consider the most efficient means of collecting and compiling the required information to ensure that the burden on reporters, and on themselves as data compilers, is minimised. Going forward, each institution needs to ensure that the other is kept informed of any new developments or demands in the field of financial statistics; and
- 1.6.1.11 Given the nature of their mutual relationship and the possibility for some overlap in their activities, it is essential that both institutions cooperate closely for the purposes of meeting expanding obligations in the area of financial statistics. In this context, five significant near-term developments are particularly relevant: (i) proposed changes to the CBFSAI's data collection arrangements from the insurance industry; (ii) the ECB proposal for mandatory reporting by certain classes of financial intermediary other than banks and insurance companies (ie certain types of OFI); (iii) ECB and Eurostat requirements for Financial Accounts; (iv) Eurostat's requirements for data for Structural Business Statistics purposes; and, (v) the potential impact of the ECB's initiative to require euro area member states to collect information on transactions and positions in financial securities on a security-by-security basis. This ECB initiative is intended to facilitate improved statistical quality where country counterpart statistics are being compared. The introduction of this methodology will rely on the availability of key characteristic and market information at individual security level from the ECB's Centralised Securities Database (CSDB) currently being developed. It will potentially have major implications for the collection and compilation of BOP, IIP and Financial Accounts statistics, and possibly for other statistical areas. Some other smaller developments are also under consideration (for example, changes in the data collection from credit unions). Both organisations must also take account of impending new statistical requirements from reporters in the broader financial sphere covering expanded national and non-financial sector accounts and FISIM.

## 1.6.2 Recommendations

The SPAR BES (CBFSAI) Team makes the following recommendations:

- 1.6.2.1 The CBFSAI and the CSO should jointly examine the possibilities of using relevant data available to the CBFSAI from the MFIs with a view to compiling, to the extent possible, quarterly BOP and IIP statistics and enhancing work already undertaken for Financial Accounts flows and stocks thereby reducing or eliminating collection and compiler duplication. This examination should cover the options for processing the data and compiling the results required for both institutions' purposes.

*For BOP/IIP purposes, this recommendation essentially corresponds broadly to an extension of the current approach used in the CSO's compilation of the monthly BOP statistics for the MFI sector to quarterly compilation. This, naturally, would involve a much more complex compilation process than that which exists currently for the monthly BOP data compilation. In considering different approaches, account must also be taken of the ECB's mandatory security-by-security collection requirements (involving linkage to its CSDB) for BOP/IIP purposes and of the possible wider implications of this development.*

Apart from the issue of future data collection arrangements, this recommendation does not address the question of which institution might ultimately compile the actual statistics referred to. It is made purely in the context of the need to reduce overall data collection duplication with its consequent costs for both reporters and compilers. The appropriate collection and compilation arrangements need to be agreed by both organisations.

- 1.6.2.2 If the required information cannot be obtained from the CBFSAI's statistical returns, the CBFSAI and the CSO should jointly examine the possibility of complementary data collections from MFIs to meet the statistical demands referred to while avoiding data overlaps in so far as possible.

The options to be considered and evaluated should cover the range of possibilities from unilateral collection, processing and compilation to varying degrees of work sharing for each of the major tasks involved.

- 1.6.2.3 The CBFSAI and the CSO should jointly examine the longer-term role of the Monthly Interest Income and Expense Return and whether, it would be feasible to enhance the survey to maximise its usefulness for Structural Business Statistics, National Accounts and BOP compilation. However, in the interests of avoiding duplication, this should only be done, when the potential for acquiring similar data from existing data sources is fully explored. Until then, processing and compilation of the Monthly Interest Income and Expense Return should continue on the current basis.

- 1.6.2.4 The CBFSAI and the CSO jointly examine the possibility of an expanded use of the CBFSAI's banking data to meet increasing European statistical demands under Eurostat's Structural Business Statistics for CIs. As stated earlier (see item 1.6.1.10 of the *Conclusions*), it is essential that both institutions keep each other aware of any relevant developments planned.

- 1.6.2.5 The CBFSAI's Monthly Credit Card Statistics should be examined by the CSO in consultation with the CBFSAI to determine to what extent, if any, the current data



could be used as an input into the CSO's retail sales, service statistics, tourism statistics or CPI compilation.

*The SPAR BES Team is of the view from its preliminary investigations that a considerable amount of additional data would be required to facilitate an expanded use of the credit card data for CSO purposes. However, given the small number of reporters and the very high degree of coverage obtained, this survey may prove to be an efficient method for collecting relevant additional data in a more comprehensive manner and, consequently, would be worth investigating.*

- 1.6.2.6 The CSO and the CBFSAI should jointly examine the possibility of combining or otherwise rationalising their arrangements for collecting and compiling statistics on CII (ie mutual funds and similar entities).

*This recommendation is made in the context of the present arrangement whereby the CBFSAI's monthly data is used as a significant input into the CSO's compilation of monthly BOP statistics. Developments in this area will be driven by the ECB's initiative to introduce a Regulation on data collection from OFIs and by its requirements for security-by-security data collection for BOP/IIP purposes underpinned by the CSDB. Future developments will also need to take account of Eurostat's requirements for Structural Business Statistics for OFIs.*

- 1.6.2.7 The CSO and the CBFSAI should jointly examine what statistical enhancements could result following the changes intended by CBFSAI in its data collection from the insurance industry. This examination should take account of current and future data compilation for BOP/IIP, Financial Accounts, Structural Business Statistics purposes in the context of avoiding duplication in data collection from this sector.

*This recommendation is made in the context of the vast amount of information collected from insurance enterprises by both the CSO and the CBFSAI. Rationalisation of the collection systems is considered necessary both in terms of data quality and the need for a reduction of the statistical reporting and compilation burden. Also, as insurance companies can be significant holders of financial securities, consideration of new data collection approaches for the insurance industry should take account of the ECB's mandatory security-by-security collection requirements for BOP/IIP purposes and of the possible wider implications of this development in other statistical domains. As for the collection arrangements mentioned above from MFIs, (1.6.2.1 and 1.6.2.2), if a single collection system is not feasible, then perhaps the possibility of complementary collection arrangements could be examined by the CSO and CBFSAI. If feasible, implementation of such an approach would help to minimise duplication of data reporting and probably result in better overall data quality.*

Apart from the specific recommendations listed above, the SPAR BES Team also makes the following recommendation which it considers crucially important for both the CSO and the CBFSAI. While the SPAR BES Project has largely focused on maximising the statistical potential of CBFSAI data holdings, this recommendation acknowledges that both institutions have substantial data requirements from one another in the context of meeting different statutory obligations. Hence, future cooperation will need to take account of the statistical needs of both organisations.

- 1.6.2.8 While significant progress has been made in recent years in developing cooperation between the CSO and the CBFSAI, it is clear that substantial efficiency gains could be achieved by further enhancing this cooperation. In this context, the SPAR BES Team recommends that the existing CSO-CBFSAI

Statistical Liaison Group should be established on a firmer footing and that its mandate should be formalised. The mandate should be expanded to take account of all relevant financial statistical developments and requirements in both institutions and should ensure that these are addressed in a coherent manner. In addition, the CSO-CBFSAI Statistical Liaison Group should have an agreed schedule of meetings and appropriate reporting arrangements. This more structured approach should deliver positive outcomes not only for data providers but also for the two institutions themselves as data compilers.

# Chapter 2

## Department of Agriculture and Food

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## 2.1 Introduction

The functions of the Department of Agriculture and Food (DAF) are wide-ranging and include:

- ◆ policy advice and development on all areas of Departmental responsibility;
- ◆ representation in international especially EU and national negotiations;
- ◆ development and implementation of national and EU schemes in support of agriculture, food, forestry, rural development and rural environment;
- ◆ monitoring and controlling aspects of food safety;
- ◆ control and audit of public expenditure under its control;
- ◆ regulation of the agriculture, food and forestry industries through national and EU legislation;
- ◆ monitoring and controlling animal and plant health and animal welfare;
- ◆ monitoring and direction of state bodies engaged in the following areas; research training and advice; market development and promotion; industry regulation and development; commercial activities; and
- ◆ direct provision of support services to agriculture and food.

There are a number of public bodies also operating under the aegis of the Department. The main ones that were considered to be of particular significance in this exercise were:

- ◆ Teagasc;
- ◆ Coillte; and
- ◆ Bord Bia (Irish Food Board).

Efforts were made to compile an inventory of data holdings. Over 200 holdings were identified within the Department itself.

In Teagasc, two broad types of holdings were identified – the National Farm Survey (NFS) and administrative holdings particularly in the area of the agricultural advisory function of Teagasc.

Coillte is understood to have holdings related to forestry activity.

Bord Bia does not have significant data holdings but was considered likely to have significant data needs.

Given the time constraints in the SPAR project, the team decided to concentrate on a small number of major data holdings within DAF. Apart from the criterion of likely general (as opposed to specialised) relevance of the variables for statistical purposes, a particular criterion used to select the data holdings for detailed examination was the size of the data holding in terms of numbers of farmers/farms covered.

The major holdings selected for DAF were:

- ◆ The Cattle Movement Monitoring system (CMMS);
- ◆ The Corporate Customer System (CCS);
- ◆ The Single Farm Payment system (SPS);
- ◆ The REPS system; and
- ◆ Afforestation scheme

These prioritised DAF data holdings are discussed in the following sections.

## 2.2 Cattle Movement Monitoring System (CMMS)

The CMMS is a central computerised database on the origin, identity, location, movements and disposal of all cattle born in or imported into Ireland. Food scares during the 1990s prompted consumer demand for improved mechanisms for tracing cattle and for credible assurances about the safety of food and particularly beef. The main demand was for the creation of a central database, which would contain comprehensive details of the origin, identity and location of cattle.

The origin element of the system was the Calf Birth Registration System which has been operational since 1996. From that time onwards all calf births are registered. The database holds information on the eartag number of the calf and that of the dam; sex; breed; date of birth and herd of origin.

In 1997 work started on the development of the CMMS. The system captures all movements of cattle as individual events onto a central database. It incorporates data from livestock marts, meat plants, live export points, local authority abattoirs, private sales and on-farm deaths.

While the data capture mechanisms were introduced on a phased basis from 1998 to 2000, there has been an emphasis on populating the database and improving data capture mechanisms and, consequently, the completeness and accuracy of the CMMS database.

- ◆ For example, while originally post-event notification was required for farm to farm movements, in recent years a pre-movement permit is required.
- To improve data on on-farm deaths knackeries were brought within the system in 2001.
- ◆ An animal location file was created to link an animal to a specific herd. Payments of premia were made conditional on this link being satisfactory and accuracy of the CMMS was improved as a result. The Single Farm Payment will also be conditional on satisfactory compliance with the CMMS requirements and there is provision for an increasing scale of penalties in this regard for non-compliance.
- ◆ Farmers recently were provided with the facility to view online details of their cattle herd profile as well as movements in and out of the herd. They were also provided with an online facility to register calf births.
- ◆ From 2005, the new Animal Health Computer System (which supports the Department's animal health and welfare activities) will take its core data from CMMS and will provide an annual reconciliation mechanism at the time of the herd test between the animals on farm actually and the data on computer.
- ◆ A project is in progress to introduce in 2005 an online system for the capture of data from livestock marts. This will enhance the accuracy of data supplied to CMMS by the marts.

## Statistical quality assessment

The quality of the database is considered to be good from 2002 onwards but the data for earlier years continues to be under review. Initiatives to improve compliance with the system have been described above. The CSO and DAF have been in discussions to reconcile cattle numbers from the CMMS and from the twice-yearly CSO livestock surveys. In its livestock surveys the CSO collects detailed data on cattle numbers. A certain amount of work has been done by the CSO and DAF with a view to identifying the reasons for differences in total cattle numbers and in sub-categories between the two sources. The initial gap has been narrowed and work is continuing on this. With this in mind it is recommended that, when a satisfactory solution has been achieved, the CMMS become the main data source on cattle numbers, with additional detail provided by the CSO surveys.

There is a longer -term intention in DAF to have a more general database covering cattle, sheep and pigs. This would integrate the existing animal identification and movement systems, including CMMS. It is recommended that close liaison be maintained with the CSO at the development to maximise the statistical potential of such a database, particularly for sheep numbers.

### 2.3 Corporate Customer System (CCS)

Since 1998, the Department had been compiling a database of all of its customers known as the Client Database, which was to be used as part of the new Accounts System, which went live in 2001. A proposal was made subsequently to develop a new integrated customer identification system that could be accessed by a wide range of users across the Department. It would present Department staff with a consolidated view of each customer and would provide common customer information to all areas of the Department's computer system including animal identification systems, the Animal Health Computer System, the Single Farm Payment System and the Department's accounts system. The CCS went live in 2003. It contains details on approximately 140,000 active farmers - essentially, every active farmer in the State.

The CCS holds PPSN, name, address, date of birth, gender and Department herd number.

## Statistical quality assessment

- ◆ There are some limitations to the usefulness of the herd number. For example, it is not a permanent identifier in the sense that a particular number can on occasions be re-assigned to a different farmer. However, it is uniquely assigned at any given point in time. The Department maintains a list of names linked to each herd number, where these have changed ownership. Joint ownership is linked to just one herd number and one PPSN. Herd numbers are structured with an inbuilt county coding although this is based on the address of the farm rather than the postal address of the farmer where these differ.
- ◆ About 120,000 clients have a PPSN. Older records may lack the PPSN but it is now required from newly added customers and must be in a valid format. A checking exercise has been done on the accuracy of the historical PPSN generally by matching the number with the name (with the assistance of the Department of Social and Family Affairs).

- ◆ The CCS has a clear division between individuals and companies. No information is held on company directors. VAT or CRO number has been a mandatory requirement from October 2003 onwards, but is not available prior to this.
- ◆ There can be some other gaps in the data (e.g. gender is occasionally missing).
- ◆ Farmer deaths are a problem. The Department is not always notified. If a farmer is not receiving payments they may remain on the system indefinitely.

One of the key requirements for the CSO farm surveys is the availability of a complete and up-to-date register of farms. The present register is essentially one used for the 2000 Census of Agriculture and updated based on information collected in subsequent CSO surveys and on registration and ending of herd numbers, as identified by DAF. A goal to aim for is that the CCS should eventually be the basis of a CSO register (with the CSO adding whatever other variables it requires for its purposes). At present the herd number is an identifier that can link to a large extent the CSO survey unit of agricultural holding (through the farmer) and the data contained in CCS, the CMMS and the SFP. It is recommended that the CSO and DAF work towards further improving those links.

## **2.4 Single Payment Scheme (SPS)**

From the start of 2005, as a consequence of the Fischler proposals, the SPS has replaced all CAP product-related direct payments (these direct payments included Suckler Cow, Special Beef, Ewe Premium Extensification and the Arable area payment). The background to the introduction of this payment is the move to decoupling i.e. the breaking of most links between direct payments and the amount of production or number of units of production. Thus the SPS is linked to the farmer rather than to the amount of land farmed or the amount of production. The size of the payment is related to numbers of livestock and arable areas over the three years 2000 to 2002.

Two types of data holdings exist relating to this scheme.

- ◆ The number and value of Single Payment Entitlements held by farmers during reference period.
- ◆ From 2005 onwards, data on applications for SPS made by farmers. These data are held at the level of the individual farmer with the potential for aggregation at county or national level. They are collected on the EU Area Aid application form each year. The main variable collected is the area farmed each year for each parcel of land as well as a designation of whether the parcel falls into the area aid categories of forage, arable, setaside land or is included in (the separate) REPS scheme. Each parcel of land is identifiable using iMAP system.
- ◆ The identifiers collected include name and address, herd number, telephone numbers, PPSN, and date of birth. All data is stored electronically on the DAF computer system.

### **Statistical quality assessment**

Given the purpose of the system (i.e. to determine payments entitlements), it is considered that data on applications are being well checked for accuracy. The potential of the data holding is mainly in providing a cross-check at a broad level for certain variables which the CSO collects in its large-scale surveys. For example, in recent years CSO has (under EU

requirements) included questions on REPS participation. This system could limit the need for such questions in CSO enquiries. The use of i-MAP identification in this data holding could significantly facilitate this process of comparing the DAF and CSO data holdings in the longer term (although the holdings of farmers surveyed by the CSO are not at present coded using a GIS). This, however, may be restricted by software compatibility issues between DAF and CSO.

## **2.5 REPS Scheme**

The Rural Environment Protection Scheme (REPS) is a scheme of payments designed to reward farmers for carrying out their farming activities in an environmentally friendly manner. The objectives relate to more environmentally friendly farming and production methods, to the protection of wildlife habitats and endangered species and to the production of quality food. The present scheme is the third such scheme since the 1990s and is described as REPS 3.

The scheme involves the preparation by a Department approved REPS planner of a five-year agri-environmental plan. This plan details the farming activities to be carried out to meet the scheme conditions. An application form must be completed. This requires the name, address, telephone number, e-mail address (if relevant) and date of birth of the applicant. Additional identifiers required are the PPSN and the herd number. The data holding comprises of the name, address, herd number, PPSN number, land area details, payments and inspection details of the farmers. The land details are cross-checked against the area details submitted on the applicant's annual Area Aid/Single Farm Payment applicant form.

The current number of farmers involved in the scheme is about 45,000 and is expected to rise to about 49,000 by the end of 2005 and to 54,000 by the end of 2006. The REPS database holds details of the 45,000 participants who entered under the REPS 1 scheme and the 37,500 participants who are entered under the REPS 2 Scheme.

### **Statistical quality assessment**

The main statistical potential of the holdings is the possibility of using the data as a cross-check as described above for the SFP. Inspections for compliance with the scheme are carried out on about 25% of farms to ensure farming activities are in accordance with the agri-environmental plan. A further 5% of applicants are checked to ensure that the agri-environmental plan has been prepared in accordance with the scheme's terms and conditions.

## **2.6 Afforestation Scheme**

The main data holding relates to the Afforestation Grant scheme. Records of payment applications under this scheme are held in the Department's GPAS database. This contains approximately 14,000 client records with about 1,500 new clients being added each year. Data held include name; address (including DED); date of birth; gender; herd number; PPSN; farm size category; ownership of farm (i.e. full / joint ownership or leasing); occupation (i.e. whether full-time farmer/ part-time farmer/ non-farmer / corporate body/ public authority) and VAT/CRO number. The location of the proposed plantation is identified using the i-MAP system.



## Statistical quality assessment

There is potential for using the data to cross-check or clarify incomplete or incorrect data supplied for the CSO farm surveys although at present only about one tenth of farms are involved in these schemes.

### 2.7 Other DAF data holdings

These are listed in Appendix 4. A large number of these data holdings have been used for a long time as inputs into CSO data, in particular CSO agriculture output, input and income releases and agricultural prices. They are holdings that focus primarily on the agricultural inputs producing sector and are invaluable as a source of data that would otherwise have had to be collected directly by the CSO.

There are a large number of fairly specialised data holdings of DAF in the area of food safety also referred to in Appendix 4. Discussions have been ongoing at EU level on the setting up of a system of food safety statistics. The approach being adopted is to use to the maximum administrative data in the Member States. It is likely that in the medium term Member States will be required by Regulation to supply such statistics and the DAF data holdings will be key in this exercise.

An emerging area of interest is statistics on rural development. Definitions and the content of an internationally comparable system of rural development statistics are being discussed at international level. Any such system would draw on a wide variety of data sources including certain data holdings relevant to agriculture.

### 2.8 Teagasc National Farm Survey (NFS)

The National Farm Survey is conducted each year by Teagasc. Its objectives are to

1. determine the financial situation on Irish farms by measuring the level of gross output, costs, income, investment and indebtedness across the spectrum of farming systems and sizes,
2. to provide data on Irish farm incomes to the EU Commission in Brussels (as required under EU legislation on the Farm Accounts Data Network),
3. measure the current levels of, and variation in, farm performance for use as standards for farm management purposes, and
4. provide a database for economic and rural development research and policy analysis.

A representative random sample of farms is selected with the cooperation of the CSO and in compliance with the provisions of the Statistics Act, 1993. Typically this is about 1,200 farms.

The data collection is carried out by having the farmer complete a farm records and accounts book. This seeks data at a very detailed level on all the income and expenses arising from the farm activity. For example, for crops details of the amount and value of sales during the year are recorded as well as expenses such as fertilizer, seed, crop protection, machinery hire etc. Similarly for livestock a huge amount of detail is recorded on livestock expenses and sales. Every other cost including cost of machinery, farm labour, farm buildings, land purchases and land sales, loan charges etc. is also recorded. Demographic data relating to the farm are also recorded. A number of field staff assist in the collection process.

The results are published in an annual publication and show averages, based on the sample, for variables like farm income, gross output, costs, investment etc. broken down by farm size, farming system etc. The farming system classification is based on a standard EU farm typology.

The results are also a key input into the CSO agricultural output, input and income releases by allowing the estimation of expenditure on particular inputs.

The data at farm level are captured electronically on a Teagasc database.

A related but separate Outlook Survey is also carried out annually on the sample. This asks typically 60-70 questions, often of an attitudinal nature, such as career intentions in farming and investment. These results are of particular interest in the recent context of the CAP review.

### **Statistical quality assessment**

Normal validation checks are done on each return (e.g. whether results for technical and financial parameters are within allowable variations). A report for each farm is evaluated for credibility in terms of farm management. This would normally consider variation over a three-year cycle and is discussed with the individual farmer. At a global level data are cross-checked with experts. The response rate for the survey is about 50-60%.

While income data are collected, this relates to family farm income only and does not include income from non-farming sources. Thus it may not be equal to household income. The NFS would, however, be a key source, in conjunction with other household income data sources, for analysis of the total income of agricultural households.

## **2.9 Other Teagasc data holdings**

The main holdings considered were the Client Information Management System (CIMS) and the E-Profit Monitor.

### **CIMS**

This holding is based on data collected through contacts, particularly on the advisory side with farmers. Teagasc would have contacts with about 80,000 farmers each year.

The data collected are financial information relating to the delivery of the service and some enterprise information relating to the farm. The data collection unit is the farm. Identifiers collected are the name, address, phone numbers, e-mail, client number, PPSN and herd number.

Data collection dates from 1989.

The data are used to provide an enterprise profile of the client.

### **E-Profit Monitor**

The E-Profit Monitor Program is an internet-based program which allows farmers to analyse the performance of their farm and to compare its performance with similar production systems around the country. It is designed so that the farmer or his adviser can input the information on-line. The program can deal with all enterprises, including dairy, cattle, sheep and tillage.

Individual detailed analysis of the farms can be produced each year and viewed by the farmer on the internet.

Information on inputs is entered into the system by the farmer. Various reports and analysis are produced. The reports give an analysis of the important physical and financial measures of the farm business both of individual enterprises (cattle, sheep, tillage, etc.) and a whole farm analysis. Having a completed the e-Profit Monitor allows the farmer to examine, in conjunction with their adviser, key indicators such as farm output, variable and fixed costs, gross margin and net profit. In this way performance, production costs and profit can be examined and compared in various ways. The exercise is primarily carried out for the benefit of each client but it is also particularly useful for discussion groups or producer groups with similar enterprises where group reports can be produced and members can benchmark their performance within the group. The analysis of output and production costs will identify the strengths and weaknesses of the farm business and indicate remedial actions. Over time, it will also keep track of changes and record if progress is being made as a result of the adjustments being made.

Data collection in the current format began in 2003 and in 1998 in previous formats. While there is no checking against independent sources, data validation is built in and the data are checked by an adviser before being used for comparative purposes.

Identifiers collected are name, address, phone number, e-mail and PPSN. Farms are classified by type – dairy, tillage, cattle or sheep.

Coverage of all farmers is 1.5%.

## **2.10 Data needs**

DAF and Bord Bia made submissions on data needs that are not at present being met fully or at all.

### **DAF**

Comments were as follows:

*As well as utilising statistical data for policy analysis the Department of Agriculture and Food regularly publishes reports on the performance of the agri-food sector utilising statistics available from the CSO, the National Farm Survey and other sources, in particular the Annual Review and Outlook for Agriculture and Food examines the contribution of the agri-food sector to the national economy, analyses trends in farm income, agricultural structures and the size and structure of the food industry as well and the annual output of agricultural commodities and market performance.*

*Also, in order to assist the dissemination of information on the agri-food sector and encourage independent analysis the Department publishes a Compendium of Agriculture Statistics and a Fact-sheet on Irish Agriculture.*

*There are some difficulties in obtaining timely or regular data in the following areas:*

### **Agricultural Structures**

Ideally, the CSO Labour Input Survey should be published at the end of each year around the same time as publication of the CSO's advance estimate of Output, Input and Income in

Agriculture. This would facilitate the calculation of average income per farm/farmer (operating surplus divided by number of farms/farmer).

### ***Total Farm Household Income***

Due to the shift toward part-time farming, farm income is no longer an accurate reflection of the farm household income. In order to overcome this the EU-SILC is to provide an estimate of average total farm household income and estimates of relative and consistent poverty for farm households. Comparisons of income and poverty levels for urban, rural and farm households and the state average would be particularly useful.

In April 2004, at an OECD Workshop on Information Needs for the Analysis of Farm Household Income Issues the fact that Ireland has not up-dated “Income of Agricultural Household Sector” statistics since 1987 was raised. This prohibits meaningful comparisons with other countries. This is undertaken regularly by the OECD.

### ***Urban/Rural***

More regular availability of an urban/rural breakdown of demographic and employment statistics would facilitate stronger analysis of the impact of schemes implemented by DAF in support of agriculture, food, forestry and rural development. It would also allow facilitate more analysis on the impact of policies on rural areas.

### ***Gender***

The disaggregation of statistics on gender basis is important for evaluating the impact of policies and support schemes on women.

The NDG Gender Equality report “Assessment of The Main Gaps in Existing Information on Women in Agriculture” contained a number of recommendations in relation to addressing data gaps on women in agriculture, which should be implemented.

### ***Environment***

DAF requirements for environmental indicators are increasing in line with our Kyoto and Gothenburg commitments.

### ***Bord Bia***

Comments were as follows:

Overview of the discussion was that most requirements were being met largely. However, there were concerns over a number of issues listed below.

- 1) There appears to be an issue in relation to the CSO livestock survey and the Department of Agriculture National Beef Assurance Division publication of CMMS data, and the consistency between the two.
- 2) Trade data -
  - Exports (for meat) appear to be consistently underestimated (our suspicions are that the variation could be in processed product – particularly the UK) Discussions around this issue have been held between Bord Bia and CSO staff.

- Difficulties establishing what products are covered under codes and a more flexible approach would assist this, i.e. could we get to know the sort of products fall under the codes (particularly a problem in more processed products).
- There are some concerns that the country of origin has been recorded as where the product last left as opposed to the origin. We understand that this is outside the control of the Revenue and the CSO. However this reduces the usefulness of the data.
- Difficulties aligning NACE and SITC levels – would be better to look at a product level, rather than a sector level.

*Possible requirement issues:*

1) Census of Agricultural produce (potatoes, vegetables, protected crops, fruit) is carried out between the Dept of Agriculture and Food and Bord Bia (formerly Bord Glas). However, the CSO carries out surveys and censuses of major crops also. We would question where this function should lie in the future, i.e. with whom?

2) More timely supply of the Meat Supply Balance.

## **AgriVision**

In addition, the Report of the AgriVision 2015 Committee (published in late 2004) makes a considerable number of recommendations. Implicit in these are data needs in several areas including quality production, regulation and rural development.

### **2.11 Summary of recommendations**

- ◆ It is recommended that the work of identifying the reasons for differences between CMMS and CSO cattle numbers data continue and that when a satisfactory solution has been achieved that the CMMS become the main data source on cattle numbers, with additional detail provided by the CSO surveys.
- ◆ There is a longer-term goal for DAF to have a more general database covering cattle, sheep and pigs. This would integrate the existing animal identification and movement systems, including CMMS. It is recommended that close liaison be maintained with the CSO at the development stage to maximise the statistical potential of such a database, particularly for sheep numbers.
- ◆ A goal to aim for is that eventually the CCS should be the basis of a CSO survey register (with the CSO adding whatever other variables it requires for its purposes). At present the herd number is an identifier that can link to a large extent the CSO survey unit of agricultural holding (through the farmer) and the data contained in CCS, the CMMS and the SPS. It is recommended that the CSO and DAF work towards further improving those links.

# Chapter 3

## Department of Arts, Sport and Tourism

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### 3.1 Introduction

The Department of Arts, Sport and Tourism (DAST) mission is:

*"To support national economic and societal progress by enriching the quality of life of the people of Ireland, by facilitating the promotion and sustainable development of the arts and culture, sport and tourism sectors, while optimising interaction between them."*

The Department has responsibility for the formulation, development, and evaluation of policy in the areas of tourism, arts (including culture), and sport. Agencies operating under the aegis of the Department include:

Policy area	Agency
Tourism	<b>Fáilte Ireland</b> Tourism Ireland
Arts	Arts Council Chester Beatty Library Irish Film Board Irish Manuscripts Commission Irish Museum of Modern Art National Archives National Concert Hall National Gallery of Ireland National Library of Ireland National Museum of Ireland
Sport	Irish Sports Council ----- Horseracing Ireland Bord na gCon

This chapter summarises the data needs and data sources in the areas of Tourism, the Arts, and Sport. In compiling the report, the CSO team worked closely with individuals from the Department as well as persons from many of its Agencies. The team also examined relevant CSO data and likely developments within the CSO as well as the broader international statistical system in these three sectors. The chapter ends with some recommendations on how data availability could be improved to better meet policy needs.

### 3.2 Tourism

#### 3.2.1 Tourism

The World Tourism Organisation's definition of tourism is as follows:

*Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.*

The implementation of many of the Department's policies in relation to tourism is the responsibility of Fáilte Ireland (FI) and Tourism Ireland (TI):

- ◆ The National Tourism Development Authority, operationally known as Fáilte Ireland, has responsibility for working with the Irish tourism industry to provide a one-stop-shop for strategic and practical support to develop and sustain Ireland as a high quality and competitive tourist destination. In carrying out its responsibilities in this regard, they provide a wide range of independent data on the sector as well as statistics based on their continuous annual surveys. They also administer and implement the tourism grant schemes on behalf of the Department.
- ◆ Tourism Ireland is an all-island company responsible for marketing the island of Ireland as a tourism destination in overseas markets. In carrying out its functions, Tourism Ireland undertakes extensive market research across all key source markets for Irish tourism and produce regular market intelligence information for the industry and policy-makers.

The following section deals with the major issues in relation to the needs of the tourism sector from a policy point of view. The Department's Management Advisory Committee submitted a report to the Expert Needs Group in relation to the priority statistical needs for policy making in the area of tourism. The needs outlined in this report are also taken into account in this chapter and are discussed below under the headings, Tourism Policy Review and other tourism data needs.

### **Tourism policy review – Recommendation for a Tourism Satellite Account**

In 2003, a major review of tourism policy was undertaken at the behest of the Minister for Arts, Sport and Tourism and the final report of the high-level group was presented to the Minister in September of that year. The report, entitled "New Horizons for Irish Tourism: An Agenda for Action", is a comprehensive assessment of the economic importance of the tourism industry, detailing the significant growth experienced in the sector throughout the 1990s and the challenges facing it today.

The Report was accepted by Government as the blueprint for policy formulation for the next 10 years. The Report presents a clear strategy, with specific recommendations to help achieve specific targets contained in the report (including the doubling of overseas revenue to €6 billion over the next ten years).

One of the nine key strategic success drivers identified in the Report is Information, Intelligence and Research. In that context, a key recommendation for action emerging from the report is to develop a Tourism Satellite Account in order to more accurately reflect the importance and contribution of tourism to national economic development.

In July 2004, "First Steps Tourism Satellite Account Project" was completed for Ireland and Northern Ireland. The project was initiated by the Tourism Officials Group of British-Irish Council (formed under Strand Three of the Good Friday Agreement) and co-funded by the EU. The final report developed a pilot TSA based on the model developed by Eurostat and endorsed by the World Tourism Organisation. The Department, through Fáilte Ireland and Tourism Ireland, were involved in the development of the account along with the CSO and the Northern Ireland Tourist Board (NITB).

The results of the pilot TSA for Ireland showed that direct tourism expenditure in the year 2000 accounted for 4% of GDP. The direct employment figure was 87,000 persons and with the application of employment multipliers to include persons indirectly providing services to tourism, this rose to 170,000 persons. The TSA exercise also showed the importance of domestic tourism expenditure, potentially through same-day visits.



The TSA provides a clearer picture of the overall role of tourism in the national economy by detailing the estimated flows of money pertaining to tourism activity along with other relevant indicators. In attempting to construct the tourism satellite account, a number of data gaps were identified:

**A lack of data on same day domestic tourism:** Same day domestic tourism has generally been neglected in the past where the emphasis has been on “export tourism” for balance of payments purposes. In particular, the TSA found that expenditure by residents in Ireland who travel within Ireland and return home on the same day is considerable.

**A supply side business register:** At present all hotels and guesthouses with 10 or more rooms must register with Fáilte Ireland. However, there is a lack of data on the unregistered sector, which is quite sizeable. A national register covering all accommodation units and other tourism businesses would be a valuable resource for both potential tourists and for the sector itself. A supply side register such as this would provide a framework for further analysis via surveys across regions, business units and types of tourism product.

**More regional data:** There is very little data available on the regions visited by overseas tourists to Ireland. Whilst FI produce some data, the CSO has none. This is seen as a major shortfall in the existing set of tourism statistics. One obvious source for improved regional profiles is from a survey of accommodation service providers. This, in turn, would require an improved accommodation register and co-operation from the accommodation sector.

**Cross border tourism for Ireland, Northern Ireland and overseas visitors:** The current CSO estimates of cross border tourism need to be reviewed. The lack of accurate data in relation to cross-border tourism is increasingly significant in the context of Tourism Ireland's remit to increase the number of overseas tourists visiting both North and South of the border, and Failte Ireland's marketing campaigns aimed at encouraging tourism from the North. At present the official statistics do not include an effective measure of tourists who enter the Republic of Ireland via Northern Ireland.

**The domestic leg of the outbound journey of resident tourists:** The CSO Household Travel Survey captures information on the international part of an Irish resident's trip abroad. However, information on that portion of the holiday spent in Ireland (if relevant) is unknown. This is domestic tourist expenditure within Ireland by Irish residents on the domestic leg of the outward and return journeys and can include transport and accommodation costs and other expenditure such as food and drink.

**More expenditure detail:** Tourist expenditure in Ireland broken down at a more detailed level is urgently needed. This will enable the compilation of a TSA, but will also benefit the production of CSO National Accounts Input-Output tables and will improve the calculation of the domestic portion of the Consumer Price Index (CPI) weights. The importance of pre-payments and internet bookings on expenditure flows has become considerable in recent times and information on this type of expenditure is therefore also required.

The TSA analysis highlighted that the per diem spend for domestic tourism is relatively low when compared to the UK. Given the importance of domestic tourism, reliable estimates of domestic tourism expenditure are necessary.

**Gross fixed capital formation in tourism:** Data on gross fixed capital formation in tourist related sectors need to be collected and reported separately in the national accounts.

## Other tourism data needs

There is a general agreement among the agencies that more timely and frequent short-term statistics are required on the tourism sector. In particular, Tourism Ireland needs the results of the CSO surveys at a more detailed level of country of residence than is currently made available at present. For market planning purposes, they need the greatest level of disaggregation possible. They would also like to see the timeliness of the Country of Residence Survey (CRS), Passenger Card Inquiry (PCI) and Household Travel Survey (HTS) improved.

Ownership, usage and location of holiday homes was identified as another area where data would be useful. Information on ownership of second homes, particularly in popular tourist locations, would provide information on a potential new supply of visitor accommodation.

The issue of prices is another area of importance. In the past, Fáilte Ireland has attempted to develop a tourist index of prices using CSO consumer price data. If available, this would be a useful indicator of price inflation in the basket of goods and services consumed by tourists.

The topic of road use is another area of interest. Fáilte Ireland carried out a survey for the year 2000 where visitors were asked to map the actual road routes they travelled between locations visited within Ireland and the frequency of use of these routes. Such investigations reveal information used to identify road segments with a relatively high volume of international visitor travel.

### 3.2.2 Tourism data sources

#### Survey of Overseas Travellers (SOT)

Fáilte Ireland has conducted an annual survey of inbound travellers since 1972. Since 2000, it has surveyed inbound tourists<sup>11</sup> who are non-resident in Ireland. Personal interviews are carried out on a sample of tourists departing Ireland at the main airports and seaports on a continuous basis throughout the year. The monthly samples are proportionate to the monthly distribution of tourists visiting Ireland. Around 10,000 tourists take part each year.

The SOT complements the CSO Passenger Card Inquiry (PCI) and CSO Country of Residence Survey (CRS). The results of the SOT are grossed up to the results in the CSO Tourism and Travel release<sup>12</sup>. The SOT provides additional detail on tourists to that captured by the CSO survey. Additional data on the tourist expenditure breakdown and on the regions within Ireland that were visited are collected. Also, information on tourist activities and product ratings are obtained along with car usage and characteristics such as age, gender, marital and family status, social class, level of education attained, occupation and skill/qualification obtained, household income and nationality of tourists.

#### Assessment

There is no annual report specifically on the SOT itself, however, the SOT results provide data to support the FI Tourism Facts releases and TI market profiling and other research

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<sup>11</sup> A visitor is defined by Eurostat methodology as any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited. A tourist is a visitor who stays in the country of visit for at least one overnight.

<sup>12</sup> CSO Tourism and Travel release uses the results of the CSO Passenger Card Inquiry (PCI) and CSO Country of Residence Survey (CRS).

output. Tourism Ireland produces Tourism Fact sheets on all of its main overseas markets throughout the year. The SOT provides valuable information on the characteristics of overseas tourists and their visits to Ireland. It is primarily used for marketing purposes, but the regional dimension available from the output is of statistical value. The Tourism Facts series of releases provide more detail than is available from the CSO surveys. For example, tables showing the number of overseas tourists by the region visited and the amount of expenditure by region are estimated using the SOT results. Information on overseas tourist expenditure broken down by broad categories of expenditure and by area of usual residence of overseas tourist is also available from the SOT results.

The SOT does not survey overseas day-trippers, i.e. overseas visitors to Ireland who do not spend an overnight stay in Ireland. While the PCI collects basic information on these visitors, more detailed statistics on these visitors would be desirable.

### **Visitors attitudes survey (VAS)**

Fáilte Ireland has carried out the VAS since 1983. The survey collects information on the motivation and holiday experience of non-Irish born visitors to Ireland who spend at least one overnight and whose main purpose of visit is a holiday.

The sample for the survey is taken from a cross section of overseas holidaymakers to Ireland from all of the main foreign markets. Based on the latest Fáilte Ireland SOT data, sample quotas are set by country of residence in order to ensure adequate representation of each market. The contact sample is allocated by month across the main sea and air departure points and route groups. Using an initial screening interview, qualifying respondents are selected from the total contact sample on the basis of: main purpose being a holiday; staying at least one night; and non-Irish born visitors (for both the respondent and other members of the travelling group).

Qualifying contacts are given a self-completion questionnaire in their mother tongue along with a pre-paid envelope. Contact details were recorded to facilitate tracking of returns and follow-up of non-respondents. Just over 7,600 questionnaires were issued in 2003 during June–September. Around 3,900 or 51% returned their questionnaires. The final effective sample of completed interviews was re-weighted to be representative of non-Irish born holidaymakers from each market visiting Ireland in 2003.

### **Assessment**

The annual Visitors Attitudes Survey publication contains valuable marketing information on the attitudes of non-Irish visitors to Ireland and on aspects of the tourism experience in Ireland, such as value for money, satisfaction with the holiday, perceived advantages and disadvantages of Ireland as a holiday destination. Motivations for the visit, rating of various products, including accommodation, eating out, internal transport, visitor attractions and outdoor activities, based on quality, customer service and price are also covered as are the information sources used in planning and choosing the holiday. The results point to areas of the tourism product that need to be improved in the future. Visitor characteristics such as age, gender, family status, occupation and area of residence are also collected.

The use of the SOT allows the VAS to adequately address each of its markets. Valuable marketing information can thus be gleaned on the smaller markets as well as on the more developed ones.

## **Fáilte Ireland survey of overseas car tourists 2003**

A survey was carried out at air and sea ports in August and September 2003 among non-Irish holidaymakers leaving the country on conclusion of their visit. Car touring visitors were defined as overseas residents whose main purpose of visit to Ireland was for a holiday and who had either brought or hired a car. At least one overnight stay in Ireland was required also. Visitors were asked for their opinions on touring in Ireland and other questions on the quality of their visit.

Self-completion questionnaires were handed to qualifying visitors after face to face interviews at the key air and sea ports of departure. The sample was allocated by month across all of the main air and sea departure ports and routes. At the analysis stage, the final effective sample of completed interviews was re-weighted to be representative of non-Irish born car touring holidaymakers from each market visiting Ireland over the survey period of August and September.

Only the main markets of Britain, North America, Germany, France, Netherlands and Italy were included in the survey. Over 1,600 questionnaires were placed with a response rate of 54% (875 returns) and the results of the survey appeared in the Visitors Attitudes Survey 2003.

### **Assessment**

This sector of the tourism market is very important to the industry. Valuable feedback is obtained on the views of foreign holidaymakers on their experience of car touring in Ireland. In addition, this information can be used to address issues relating to the road infrastructure within the country.

## **Fáilte Ireland hotel survey**

The hotel surveys began in the 1970's. The aim of the survey is to monitor registered<sup>13</sup> hotel performance categorised by grade, region (Regional Tourism Authority area), the size of the hotel in terms of rooms and the location of the hotel (major metropolitan area, other urban and rural). Hotel bed and room occupancy rates and the source of sales (i.e. the country of residence of hotel visitors) are also collected.

Over 200 hotels were sampled in 2003 representative of the hotel sector by tourism region and hotel grade. Each hotel undertook to provide monthly information on the number of room-nights and bed-nights sold throughout the year. Paper questionnaires were returned each month by the responding hotels and follow-up was by phone. An 80% response rate was achieved in 2003. The results of the survey were grossed up to the national hotel room and bed stock (using the Gulliver System of capacity stock) to provide national results.

### **Assessment**

Three interim reports are released during the year and the overall results for the year are published in the annual Hotel Review. Information on occupancy rates by hotel grade and across regions is produced. This is a critical indicator of performance in the industry. The distribution of bed-nights across the different markets is available from the report on a monthly basis. This provides information on the source of the demand in the sector.

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<sup>13</sup> Fáilte Ireland collect basic information on all hotels operating in Ireland. Hotels and large guesthouses with more than 9 rooms can register with FI.

The database of registered hotels is a valuable source of information on the hotel sector in Ireland. It could be used as a frame for further analysis of the sector. For example, hotel turnover broken down into accommodation, food, drink and other services could be measured. At present, financial information on the hotel industry in Ireland and Northern Ireland is collected and disseminated in the Horwath Bastow Charleton Hotel Industry surveys. These annual surveys collect information on the operational performance of a sample of hotels, including revenue, expenses, payroll and profits data.

### **Fáilte Ireland survey of visitor attractions**

These annual surveys of visitor attractions began in 1991. The survey uses a sample of attractions representative of the sector by type of attraction and by region. The sample is drawn from the visitors' attractions database produced as part of the 2003 exercise. The focus of the survey was to obtain an insight into the performance of fee charging and non-fee charging visitor attractions in 2003 (previously only fee-charging were included).

As part of the 2003 FI survey of visitor attractions, an audit of the existing information available on tourist attractions in Ireland was carried out and an up-to-date database of all fee charging and non-fee charging visitor attractions was produced. The Regional Tourism Authorities in each tourist region were asked to cross-check the attraction listings with their own records before the final version was produced.

The database of visitor attractions arising from the audit represented the sampling frame for an initial telephone survey of visitor attraction managers. In undertaking the telephone survey, FI sought to establish contact with all 533 attractions identified in the audit. A total of 26 attractions were found to be closed while a further 30 were non-contactable. Around 19% of attractions (104 attractions) refused to participate in the survey. Contact and visitor attendance information was collected in respect of 373 visitor attractions, 293 of which were fee-charging and 80 of which were non-charging. Information from the telephone survey was subsequently added to the visitor attraction database submitted to Fáilte Ireland in June 2004.

The following information was recorded at the telephone survey stage.

- ◆ Name and address of attraction;
- ◆ Contact name;
- ◆ Contact information (telephone/fax/email);
- ◆ Type (Historic House/ Castle, Museum etc);
- ◆ Category (fee-charging/non-charging);
- ◆ County;
- ◆ Region;
- ◆ Membership of marketing group;
- ◆ Ownership; and
- ◆ Attendance figures for 2003.

For the final stage of the Visitor Attractions Survey 2003, FI carried out more detailed interviews with 200 visitor attractions, 130 of which were fee-charging and 70 non-charging. The survey, which was carried out as an on-line exercise, sought to obtain information on the following topics:

- ◆ Attendance figures by month and for the year;
- ◆ Details of admission charges;
- ◆ Income;
- ◆ Breakdown for all income categories;

- ◆ Income performance compared with previous year;
- ◆ Average time visitors spend in the attractions;
- ◆ Total annual spend on marketing activities;
- ◆ Change in marketing spend compared to previous year;
- ◆ Details of marketing activities in 2003;
- ◆ Number of employees; and
- ◆ Staff training.

## Assessment

The survey provides useful information on the number of visits to the different attractions across tourism regions, the average times spent at each attraction and information on the source of income earned by the attractions e.g. attendance fee income and other sources such as catering and retail income. Advertising expenditure by the attractions is also covered along with employment in the attractions.

For non-fee charging attractions, estimates of attendance should be treated with caution. Unlike the fee-charging attractions where most sites maintain a record of visitor throughput, the opposite is the case in the non-charging attractions sector. Comparability, therefore, across both types of attractions needs to be checked for consistency of measurement of attendance. This is an important aspect to be resolved in order to make the statistics worthwhile.

The audit of attractions could also be used to gather geography information to allow location mapping of the attractions. The Geo-Directory<sup>14</sup> maintained by An Post and the OSi is a potentially useful source in this regard.

Information on the nationality of attendees would also be a useful addition to the data that could be obtained from the survey.

## Fáilte Ireland tourism business and employment survey

The main aims of FI's Tourism Business and Employment Survey for 2003 are to provide information on the employment position in each sector of tourism in Ireland, to monitor trends in employment and to help formulate strategy in relation to HR issues. The tourism sectors included in the survey are:

- ◆ Hotels;
- ◆ FI Registered Guesthouses;
- ◆ self-catering accommodation;
- ◆ restaurants;
- ◆ non-licensed restaurants/fast food operations;
- ◆ licensed premises - public houses;
- ◆ tourism services and attractions (i.e. heritage and cultural attractions, visitor service operators, e.g. car-hire and coach tours, leisure and sporting activities); and
- ◆ health services catering and industrial catering enterprises.

A representative sample of the population for each sector was established, ensuring that all regions, grades and sub-sectors were represented. Mail-outs, with follow-up interviews by phone or face-to-face interviews were conducted during August and September. The

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<sup>14</sup> This directory is a register of all address points and their geographical co-ordinates within the State.

information obtained included numbers of establishments, employment numbers, job status (part/full time), gender of employee, vacancies, staff turnover, recruitment issues, training and development of staff, prospects, issues affecting operations and future challenges.

For the hotel sector, a representative sample of the population of all registered hotels was established ensuring that all regions and grades of hotel were represented. Questionnaires were sent to 250 hotels, of which 140 (56%) responded, representing a sample size of 16% of the number of registered hotels in Ireland. The collected data were weighted according to the regional responses using the eight FI tourism regions and the 3 EU regions.

## Assessment

Eight reports from the survey year were released by FI before the end of 2003 relating to each of the sectors in turn. These reports highlight the employment profile of the sectors, identify future staff training needs and establish the reasons for changes or trends in the sector over earlier years.

Employment by gender, by job status (permanent/seasonal), by region, by status (full-/part-time) and by hotel department, for example, are collected along with current employment vacancies.

The FI populations of the different tourism sectors are a valuable source of information on the tourism service providers in Ireland. These lists of databases can be used in any future CSO surveys into these sectors where information on the trading dimensions of businesses can be investigated.

The CSO Business Register of these business sectors could be maintained using the FI information on an annual basis.

Fáilte Ireland, via the registration of hotels and guesthouses, hold a dataset of all registered hotels and guesthouses in Ireland. The tourism business and employment surveys included research into the existing FI dataset of the hotel sector. In addition, further research was carried out into the other tourism sectors. This research yielded the populations of hotels, guesthouses, restaurants, etc. used in the surveys. The research drew on existing information in FI as well as from The Irish Hotel Federation's Be Our Guest Guide, Gulliver InfoRes Services Ltd., Irish Boat Rental Association, Restaurant Association of Ireland, Licensed Vintners Association and the Vintners Federation of Ireland. The tourism services and attractions sector utilised a study undertaken in 2002<sup>15</sup> as the basis for its population. The Hazard Analysis Critical Control Path (HACCP) and Health Board listings provided the population for the health services and industrial catering sector. These populations should be combined and appropriately coded by the standard classification of industries and used as the basis for a comprehensive register of tourism businesses in Ireland. Regular updates should be carried out to maintain the register. Such a register would be a valuable tool in further analysis of the sectors. Updates could be maintained via the Regional Tourism Authorities, the relevant associations and other relevant sources.

## Fáilte Ireland tourism barometer

The FI Tourism Barometer is carried out in May, June and September of each year. The barometer is Fáilte Ireland's *state of the season* survey designed to provide an insight into tourism performance of the year to date and the prospects for the remainder of the season based on the service providers' opinions. Around 1,000 service providers are surveyed in

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<sup>15</sup> "Determining the Size and Composition of the Tourism Services and Attractions Sector", 2002, Fáilte Ireland.

each wave asking for their perceived performance year-on-year to date, their expectations for the short term, and their opinions on the reasons for the performance to date.

### **Assessment**

The barometer reflects opinion on the ground at critical points in the tourism season. It is a useful tool providing a quick and up-to-date *newsflash* on the tourism sector by the people most affected.

### **Fáilte Ireland other accommodation surveys**

Fáilte Ireland carry out monthly surveys to obtain room and bed occupancy rates and the source of accommodation business, i.e. country of residence of visitor, to approved B&Bs, guesthouses, self-catering and hostels during the months of April to October. Data are collected on a continuous daily basis during each month with respondents asked to complete a questionnaire in respect of the previous night. Around 10 new businesses are surveyed every day and returns are by e-mail or by using an on-line facility.

### **Assessment**

The sample size is small and the purpose of the survey is to get an early indication of the performance of the non-hotel accommodation sector during the year. It complements the hotel survey, which samples the hotel accommodation sector only.

### **Fáilte Ireland tourism product surveys**

Fáilte Ireland also carry out a number of ad-hoc surveys into particular aspects of the tourism product for marketing purposes. Products such as angling, golf, hiking/walking, equestrian pursuits and inland cruising have been investigated in the past.

### **Assessment**

These surveys are usually driven by a particular need in a given year to investigate a particular product. They are based on small sample sizes of particular tourists to Ireland. They provide valuable information on particular types of tourists.

### **Fáilte Ireland Grant Schemes Database**

Funding for capital projects undertaken by businesses involved in the tourism sector has been made available by the Department in previous years. The administration of these funding schemes has been carried out by Fáilte Ireland. The present scheme is part of the Department's overall Tourism Development Strategy 2000–2006 and businesses can apply for capital assistance under three measures: development of major attractions, special interest pursuits and tourism/environment management.

Based on the applications received in Fáilte Ireland, a database of tourism business units has been built up over the years. Information contained in the database includes the name and address of the business, county, tourist region, eligible cost of project, total cost of project, grant level and type of business unit applying, e.g. large registered tourist attraction, tourist information office, special interest holiday facilities such as golf club and hotel.



## Assessment

The information contained in the database is a valuable source of information on business units operating within the tourism sector. Information could be tabulated showing capital expenditure within the tourism sector broken down under the 3 measures. It could be used in conjunction with other data from the Department of the Environment, Heritage and Local Government to estimate capital formation in the tourism sector.

The information from the database could be combined with the other Fáilte Ireland databases of hotels, restaurants and other tourism business units to form a more comprehensive database of all tourism units in the state.

The Department of Communications, Marine and Natural Resources are responsible for a further measure under which businesses can apply for funding relating to fishing and angling tourism.

## Tourism Ireland Data Sources

Tourism Ireland conducts many consumer surveys overseas for market research purposes. In addition, occasional work is commissioned on the island of Ireland, for example, assessing changes in air access capacity or stakeholder perceptions of Tourism Ireland and its activities. TI also publish a range of fact cards and reports including an annual publication profiling the volume and value of overseas tourism to the island of Ireland. A series of 'Marketing Insights', which profile tourism from the major source markets as well as highlighting other consumer trends of interest to the island's tourism industry, are also published.

The surveys conducted overseas are mainly ad hoc in nature. Their objectives include:

- ◆ Understanding trends in holiday taking and consumer behaviour;
- ◆ Segmenting consumers in an effort to identify Ireland's best marketing prospects;
- ◆ Profiling potential visitors to Ireland - their demographics, holiday taking behaviour, needs and motivations;
- ◆ Identifying the impact of tourism marketing activity on consumers' intentions to visit;
- ◆ Assessing interest in visiting to Ireland;
- ◆ Benchmarking the price and availability of the Ireland tourism product in comparison to competitor destinations;
- ◆ Testing the quality of Tourism Ireland's consumer advertising and identifying how this could be more effective; and
- ◆ Measuring consumer awareness of advertising for the island of Ireland.

### 3.2.3 Other data sources

The CSO currently provides tourism statistics based on a number of surveys it conducts.

#### Country of Residence Survey

The CRS is a continuous frontier survey of passengers conducted by CSO interviewers on a sample of flights and sailings at the major air and sea ports. It is used to provide analyses of overseas passengers arriving and departing by country of residence. This survey allows the CSO to measure the number of non-Irish residents travelling into Ireland and the number of

Irish residents travelling abroad. Results are published in the monthly Overseas Travel Release. The sample size in the 2003 CRS was 574,000 passengers (288,000 inward and 286,000 outward). There were almost 6.4m visits to Ireland and 4.9m Irish visits abroad in 2003. The above release provides the number of *trips* into Ireland as opposed to *visits*<sup>16</sup> by tourists since no information on the length of stay of the visitor or on the purpose of the visit is collected. Day-trippers are therefore included but not discernible in the results (see PCI below for this variable). The Cork, Shannon and Dublin Airport Authorities supply figures on the total volume of passengers on flights to and from various Irish airports broken down by route (cross-channel, transatlantic, continental) and carriers (foreign and Irish). Sea passengers at all major seaports are included also.

Some procedural and methodological improvements were made to this survey during 2004. The CRS form was modified to allow for more detailed country of residence breakdowns. A new questionnaire, currently being piloted, allows for the capture of all countries of residence (as opposed to some countries and some broad country groupings) and should result in the production of more detailed statistics. In addition the new card will capture the country of destination/origin of each flight/sailing as opposed to the 3-Route breakdown currently used. From mid-2005 some of the smaller regional airports will also be covered.

### **Assessment**

The CRS provides an early estimate of the numbers of trips taken by Irish residents abroad and the number of trips taken to Ireland by non-Irish residents on a monthly basis. In this respect, it is a very good early indicator of overseas travel activity. Monthly figures come out within 5 weeks of the period in question.

The trips by non-Irish residents are broken down by broad category of area of residence in the present releases. The CSO will be publishing a new monthly detailed country of residence series in July 2005 which will address the need for a more detailed breakdown of the country of residence of overseas visitors.

### **Passenger Card Inquiry**

As with the CRS, the PCI is a continuous frontier survey of passengers conducted by CSO interviewers on a sample of flights and sailings at major air and sea ports. Selected passengers are asked to fill out a self-completion questionnaire at the port of entry/departure. This survey details the purpose of journey, total expenditure, length of stay and fare payment details of visitors to Ireland and Irish visitors going abroad. Type of accommodation used and the number of nights in each type used is also recorded for overseas passengers. The country of permanent residence is also recorded for all visitors. Results from the CRS are used to gross the results of the PCI survey. The sample size of the PCI was 519,000 passengers in 2003 (278,000 inward and 241,000 outward). The results of the PCI are published in the quarterly Tourism and Travel Release.

### **Assessment**

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<sup>16</sup> A visitor is defined by Eurostat methodology as “any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.” Therefore, trips can include those travelling for remuneration in Ireland. Commercial drivers travelling on sea routes are excluded.

The PCI is a long-established and very important survey. It provides valuable information to the Balance of Payments section of the CSO on the total expenditure by non-Irish residents in Ireland and the total expenditure by Irish residents abroad.

No details of the type of expenditure such as food, car hire or accommodation costs are presently asked in the PCI. This information would be useful to Tourism Ireland, to National Accounts and in the compilation of a TSA.

Tourism Ireland would also like revenue breakdowns at the country level and by purpose of visit. This type of analysis would help TI monitor the revenue targets set by Government for each of their markets.

The PCI has many weaknesses in its present format (self-completion card being a notable one). The information it produces is classified by route of travel. It doesn't provide basic information such as country of destination, overseas sailing/flight origination, age, sex, regions visited, expenditure breakdowns, additional activities, time spent in Northern Ireland and so on.

The establishment of a Household Travel Survey has created an information overlap for Irish Visits abroad (generated by the HTS and the PCI). The HTS provides much more detailed and interesting information and is a far richer data source. This overlap must be examined as it represents an element of duplication of data collection. In addition, the PCI has some coding/classifications weaknesses and most importantly the attempts to measure cross-border movement by overseas visitors has failed.

The focus of the PCI should be re-orientated towards Visitors to Ireland, more specifically an interview of these people before they leave Ireland using a series of streamed questions. This is a strong argument for considering CAPI<sup>17</sup> as the method of data capture. Potentially this could give many statistical benefits and eliminate the need to print, scan and store an ever-increasing volume of cards. If surveying of Irish passengers is to continue then some rationalisation, in light of the success of the HTS, should be possible.

## **Household Travel Survey**

Information regarding the number of domestic and international trips with at least 1 overnight stay made by Irish Residents is collected on a quarterly basis by the HTS. A sample of 12,000 households (around 1% of all private households) is selected each quarter from the Electoral Register. Selected households are asked to complete a form detailing household composition, age and gender of each household member and trips taken (by month of departure) in the relevant quarter. Survey results are weighted to agree with population estimates broken down by household type provided by the Quarterly National Household Survey. These results are further weighted to agree with the CRS results.

## **Assessment**

The HTS has considerable potential as a survey of Irish households. In its present form, additional information on travel patterns by household composition is already available. Information on cross-border visits by Irish residents is also available from this survey. A re-design of the survey form, including reducing the recall period to 1 month for short trips and 3 months for longer trips is nearing completion. It will be piloted in Q2 2005 with the aim of full implementation in Q1 2006. New information on port of exit, portion of foreign trip spent

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<sup>17</sup> Computer Assisted Personal Interviewing.

in Ireland and internet bookings will also be collected. This survey should act as the benchmark for a revised PCI.

### **Accommodation Survey**

The CSO is presently considering a new survey of accommodation establishments. This new survey will be limited to registered establishments only and will survey specific reference weeks. If the survey proves successful, it will go a long way to addressing the regional profile of foreign tourists and in identifying tourists from Northern Ireland.

## **3.3 Arts and culture**

### **3.3.1 Arts policy context**

The Department's Management Advisory Committee (MAC) made a submission on priority statistical needs for policy-making. They cited a need for better cultural statistics in the following areas:

- ◆ Definition of the set of cultural activities;
- ◆ Statistics on the number of operators involved in cultural activities;
- ◆ Statistics on employment in culture;
- ◆ An analysis of public expenditure on culture;
- ◆ Disaggregation by public and private cultural activity; and
- ◆ Participation in cultural activities.

The priority need for an agreed national cultural statistics framework was also emphasised in a submission from the Arts Council. Such a framework would clearly delineate the activities that would constitute culture and would provide definitions and concepts to guide the collection of comparable statistics, as well as guiding the development of indicators and analytical research. The Department's MAC supported the Arts Council submission which also raised issues concerning the coordination of statistics on culture:

- ◆ Improve the range of statistical information available on the cultural sector;
- ◆ A research report should be commissioned to examine existing cultural statistics in Ireland, document the gaps between the information required and the information available, investigating what can be achieved exploiting fully the data sources that already exist, and identifying a strategy for overcoming barriers to data;
- ◆ A statistical framework for cultural data should be developed by the CSO and should include standard definitions and methodologies for collecting data, ensuring that output about the sector will be consistent and comparable across regions;
- ◆ Where possible, a core set of questions on cultural activity should be included in national surveys;
- ◆ The CSO should be more involved in collecting cultural data;
- ◆ Culture variables and coding should be nationally consistent and adhere with international frameworks whilst also addressing national need;

- ◆ A national working group on cultural statistics including the Department, CSO, Arts Council, resource organisations and research institutions should be established;
- ◆ The working group's goal would be to make available timely and comprehensive data on the cultural sector in Ireland. The working group might concentrate on some baseline issues such as: scope of the cultural sector; employment and the labour market; education and training; and public expenditure; and
- ◆ The working group could also review how data might be collected e.g. via official government surveys, administrative data collected by national cultural agencies, and resource and service organisations.

The Council of National Cultural Institutions (CNCI) also cited the need for gathering consistent data across all cultural institutions which would be collected using a methodology that would allow comparison with similar international data. They also recommended distinguishing participants in cultural activities by nationality (Irish and international).

### Cultural conceptual frameworks

The European Union statistical office, Eurostat<sup>18</sup>, uses a framework for core cultural statistics that is largely based on the UNESCO set of domains<sup>19</sup>. Fields such as sports, tourism, religion, language, and the environment, which are part of the cultural field in some countries, are excluded from the current core Eurostat framework:

#### Eurostat core culture statistics framework

Domain	Themes
<b>1. Cultural heritage</b>	Historical monuments Museums Archaeological sites Other heritage
<b>2. Archives</b>	
<b>3. Libraries</b>	
<b>4. Book and press</b>	Books Newspapers and periodicals
<b>5. Visual arts:</b>	Visual arts (incl. design) Photography Multidisciplinary
<b>6. Architecture</b>	
<b>7. Performing arts:</b>	Music Dance Music theatre Drama theatre Multidisciplinary Other (circus, pantomime, etc.)
<b>8. Audio and audiovisual media/multimedia</b>	Film Radio Television Video Audio records Multimedia

<sup>18</sup> The Eurostat Working Group on Cultural Statistics meets every 1-2 years.

<sup>19</sup> Cultural heritage; Printed matter and literature; Music and the performing arts; Visual arts; Audio and audiovisual media; Socio-cultural activities; Sports and games; and Environment and nature.

Eurostat has focussed on developing core statistical data collection in the following three data areas:

- ◆ Employment;
- ◆ Public expenditure; and
- ◆ Participation.

### 3.3.2 Culture data sources

Many ongoing cultural data sources are by-products of administrative systems such as admission receipts etc. This Section contains a brief review of some potential administrative and survey cultural data sources in Ireland. They have been presented using a modified version of the Eurostat framework of cultural activities. This framework has been used solely as a presentation mechanism for this report and not as a proposal for its use as a framework for cultural statistics in Ireland.

#### Cultural heritage

This domain includes areas such as historical monuments, museums, archaeological sites and traditional arts and crafts. The principal cultural statistical data of interest in this domain is the numbers of visitors to the various attractions. However the quality of such data is generally poor and generally cannot be disaggregated by even basic socio-demographic characteristics such as sex, age or nationality. The Fáilte Ireland (FI) annual survey of attractions, which was reviewed in Section 3.2.2, provides a summary time series of the number of visitors to individual attractions. FI make use of the footfall and other visitor number counts made by the individual cultural institutions that are reviewed in this Section. The methodology used for that survey also involves the prior compilation of a register of such attractions. As part of the FI survey, information on income and employment are also collected from a subset of the attractions.

The Office of Public Works (OPW) publish an annual report on visitor numbers and receipts at Heritage sites managed by the OPW and Department of the Environment, Heritage and Local Government. The report includes an analysis of activity at individual sites. These visitor numbers are used in the Fáilte Ireland report.

The National Museum records visitor numbers to each of its four locations<sup>20</sup> using a Footfall pedestrian counting system. The Irish Museum of Modern Art (IMMA) and the National Gallery of Ireland also use a Footfall pedestrian counting system to record visitor numbers. Disaggregation of footfall visitor numbers by sex, age etc. is not possible.

A statistical analysis of the Irish museums and collections based organisations was carried out in 2002 on behalf of the Heritage Council's Museums and Archives Committee. The Heritage Council list of museums and collections based organisations was updated and used as the register for the survey. The list comprised 221 organisations. The survey examined details such as the staffing, operating budgets, founding date, visitor numbers, location, and admission charges. The survey had an overall response rate of 76.5% but there was a lower level of response to some questions. Respondents were classified by type of organisation: national authority; local authority; county museum; co-operative or community body; educational body; regional body; independent or charitable trust; private organisation; and voluntary organisation.

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<sup>20</sup> Dublin: Merrion Street, Kildare Street, and Collins Barracks; and Mayo: Castlebar.

The National Roads Authority incur expenditure each year on archaeological activity arising from road construction. For example, in 2003 over €10m was spent on the nine largest schemes. Such expenditure is considered to be part of cultural activity.

## **Archives**

The National Archives record the number of readers visiting the Reading Room of the National Archives every month. A reader's card is scanned each time a reader enters or leaves the building, but a reader is counted only once per day when compiling these statistics. Recent expansion of the volume of material available on the National Archives website has resulted in a reduction in the typical number of visits to the Reading Room made by readers. The reader's card database contains a limited amount of background information of which address is the main statistical item of interest.

The National Museum's annual acquisitions registers detail the location, find circumstances and acquisition of an object. The photographic archive contains all acquisitions since 1929 in a computerised database. This amounts to more than 50,000 photographic records. Work is ongoing to computerise earlier records. The museum submitted a list of 13 archaeological statistical indicators to the CSO team for possible inclusion in a regular cultural statistics release. Most other cultural museums and galleries also maintain electronic archives of their collections. In addition, other bodies<sup>21</sup> maintain significant data archives on a wide range of topics such as folklore, traditional music, architecture, theatre etc.

## **Libraries**

An Chomhairle Leabharlanna, the Library Council, collects, analyses and publishes statistical data relating to public libraries in Ireland. The Council publish an annual report outlining the income, expenditure, staffing, collections, issues, registered membership and services points classified by each County and City Council. This is a very detailed and informative report.

The National Library database includes the following data on readers: name; address; telephone number; sex; research interest; academic qualification; profession; and whether or not the person is registered to read manuscripts. There are approximately 5,000 readers. The system is still being developed and besides the catalogue of the library's holdings will also include the National Photographic Archive, the Genealogical Office Records, and an Online Music Catalogue.

The Chester Beatty Library (CBL) uses a manual counter to record visitors rather than an automatic system such as a footfall count. CBL has supplemented this with an annual Summer visitor survey which records the age, sex, country of residence, and working status of a sample of visitors. The 2004 survey was conducted over an 18-day period during June and July. The 277 respondents were selected at random from those visiting the Chester Beatty Library, this represents around 3% of visitors during the survey period.

## **Book and press**

The National Library of Ireland is the Irish ISSN Centre. The ISSN is an internationally used code for serial publications<sup>22</sup>. Given the wide international usage of this system, it could

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<sup>21</sup> See <http://www.archives.ie>

<sup>22</sup> See [www.issn.org](http://www.issn.org)

potentially be used to produce some comparative statistics. ISBNs are applied to once-off publications such as books. Trinity College Library has a bookstock of over 4 million volumes as well as extensive collections of manuscripts, maps and music.

In 2003, a survey was commissioned by CLÉ, the Irish Book Publishers Association. The survey covered 59 companies currently publishing books in Ireland. A total of 41 publishers completed the survey. Estimates were made for the non-respondents. The value of sales in various types of book markets and employment estimates were included in the report.

## **Visual and performing arts**

The visual arts domain includes areas such as painting and photography. The performing arts domain includes music, dance and drama. These are separate domains in the Eurostat framework. The Arts Council is the principal instrument of arts funding in Ireland. It supports a wide variety of activities across a number of culture domains. These activities include architecture, circus, dance, drama, film, literature, multi-disciplinary arts, music, opera, street theatre, traditional arts and visual arts.

The Arts Council administrative database is compiled from information returned on grant application forms. The database includes both grants to organisations and awards to individuals. Grants to organisations include grants to arts festivals and events, arts venues, and arts production companies. Awards to individuals include those made under the Cnuas, Bursaries and Projects programmes. There are about ten thousand funded client records in the Arts Council information management system. Seven different application forms are used to collect quiet similar data (5 relate to applications from organisations and 2 to individuals). The data sets are linked on the Arts Council's Management Information System via a unique Artists Reference Number (ARN). The data can be analysed by:

- ◆ Funding Programme and Sub-programme;
- ◆ Discipline;
- ◆ Activity;
- ◆ Geographical location;
- ◆ Funding Status;
- ◆ Application Type;
- ◆ Artists Reference Number; and
- ◆ Grant amount.

A survey of the economic impact of the professional performing arts in Ireland was conducted on behalf of the Theatre Forum in 2004. The questionnaire was sent to 149 Theatre Forum members. Completed questionnaires were returned by 86 members, giving an overall response rate of 58%. The returns comprised 36 theatre production companies, 11 venue based production companies, 26 performing arts venues, 8 festivals, and 5 other organisations including street theatres. The questionnaire collected data on items such as audience numbers, income, expenditure, exchequer receipts and employment.

In 2001, the Music Board of Ireland, commissioned a study of the economic significance of the Irish music industry. Questionnaires were issued to 581 entities. An effective response rate of 19% was achieved. The published results included estimates of the value added and of employment in the Irish music sector.



## Architecture

There are few statistics readily available on architecture either nationally or internationally. Examples of statistics of interest are a list of culturally significant buildings. Some data on these may be indirectly available through public funding of their upkeep, e.g. country houses. The Irish Architectural Archive collections comprise the largest body of historic architectural records in Ireland.

## Audio and audiovisual media/multimedia

The Irish Film Board (IFB) provides finance to independent Irish film-makers to assist in the development and production of Irish films. The Board holds data on individuals and organisations that have received funding and on the types of projects that were funded. The IFB annual report reveals that €10.5m was paid out in loans to film-makers in 2002.

A study on the economic and cultural impact of cinema in Ireland was undertaken on behalf of the Arts Council in 2003/2004. It involved a cinema audit to provide baseline data to co-develop a strategy for future development. The report was published in October 2004 and provides baseline information on the stock, equipment and usage of cinemas in Ireland. The report includes data on the location, type, ownership, employment, and growth rate of cinemas in Ireland.

IBEC publish an annual report on the economic impact of film production in Ireland. The reports are drawn up under the auspices of: Irish Film Board; Radio Telefís Éireann; TG4; Department of Arts, Sport and Tourism; Film Makers Ireland; and the Animation Sector. Most productions which are carried out in Ireland are required to complete an Economic Database Input Form detailing funding, expenditure, and other economic data. These forms are forwarded to the Audiovisual Federation of IBEC on a confidential basis for economic analysis. IBEC publishes the results in an annual film report analysing the benefits of the audiovisual sector to the Irish economy, in terms of employment, expenditure on Irish goods and services and fiscal contribution.

### 3.3.3 CSO culture data sources

Some cultural statistics can be derived from CSO general surveys by retrospectively reclassifying occupations, industry codes, traded commodities etc. by whether they constitute part of the domain of cultural activities. Typically such reclassification work involves the need for clear decision-making rules that are applied consistently across national and international data sources. For example, a librarian working in a public library may clearly be within the scope of cultural activities whereas a librarian working for an oil exploration company is less clearly so. A more serious problem with survey data is that typically data are coded to a level that contains a mixture of cultural and non-cultural activities and it can be difficult to determine reliable factors for assigning some element of such a category to the field of culture.

The main CSO data sources of relevance are the Quarterly National Household Survey (QNHS), the Census of Population (CoP), and the Household Budget Survey (HBS). The QNHS is the largest regular household sample survey conducted in Ireland. The main focus of the QNHS is the compilation of quarterly labour force estimates. The QNHS collects detailed information on place of employment and occupation. The Census is conducted every five years and collects similar detailed information on employer and occupation.

The HBS is conducted every five years. The survey collects very detailed information on the expenditure of persons. It is possible to attempt to identify expenditure on items that are regarded as within the scope of cultural activities however such estimates would contain a significant element of subjectivity and would typically exclude expenditure on associated items such as travelling costs to visit a museum.

## 3.4 Sport

### 3.4.1 Sport policy context

Sport was defined in the Council of Europe's *European Sports Charter* as:

All forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels.

The Programme for Government 2002 provided a framework for the Department of Arts, Sport and Tourism's policy on sport. The Programme included the following objectives:

- ◆ Continue investment in appropriate sports facilities around the country, particularly at a local level, and to put in place a long-term strategy incorporating a national audit of local sports facilities;
- ◆ Increase participation and encourage voluntarism; and
- ◆ Maintain high performance levels.

Building upon these objectives, the Department set complementary goals in their *Statement of Strategy 2003-2005*:

- ◆ Increase participation in sport;
- ◆ Improve standards of performance in sport; and
- ◆ Development of sports facilities at national, regional and local level, particularly in disadvantaged communities.

The remaining part of this Section presents a brief review of the policy context under five summary headings: sports facilities; participation (including voluntary work); high performance; disadvantaged communities; and gender.

#### **Sports facilities**

The Sports Policy and Capital Programmes Division in the Department has responsibility for the monitoring and funding of local sports facilities. Each year, the Department invites applications from sports organisations, clubs, and community groups etc. in relation to proposals for the development of sport and recreational facilities. The total allocation under this scheme in 2004 was just over €60 million.

The Irish Sports Council (ISC) is also involved in measures to develop sports facilities at a local level. The Local Sports Partnership initiative (LSPs) was launched in 2001. The key aims of the LSPs are to increase participation in sport and to ensure that local resources are used to best effect. Eight pilot sites were chosen for initial partnerships (Clare, Donegal, Fingal, Kildare, Laois, North Tipperary, Roscommon and Sligo). Further sites have since been added and the eventual national target is to have 36 Partnerships.

## **Participation including voluntary work**

Participation in sport is seen in the Department's Strategy as contributing to the physical and mental well-being of the nation and playing a significant role in potentially reducing social and economic disadvantage. Participation should be interpreted in the broadest sense to include informal exercise activity such as walking to work and family activities. International research shows that physical activity results in lower illness levels, less time in hospital, and positive mental health benefits. The guideline international standard for minimum levels of physical activity is undertaking an accumulated 30 minutes of moderate intensity activity for five or more days per week.

## **High performance**

The ISC was established in July 1999 as the statutory body for the promotion and development of sport at all levels in Ireland. The Council's responsibilities include:

- ◆ Formulation and implementation of a High Performance Strategy for Sport;
- ◆ The administration of the Grants Scheme for National Governing Bodies of Sport;
- ◆ The operation of the National Sports Anti-Doping Programme;
- ◆ The administration of the Sport and Recreation for Young People Scheme run by Vocational Education Committees; and
- ◆ Advising the Minister for Tourism, Sport and Recreation in relation to sport and physical recreation issues.

The ISC made a commitment in their Statement of Strategy 2003-2005 to create an evidence based understanding of sports participation and performance. They accordingly included the following research goal among their critical success factors:

- ◆ Number of people participating in sport classified by age, frequency of participation, gender, type of sport, geographic location, and social circumstances with a particular reference on young people.

The National Coaching and Training Centre (NCTC) provides technical support and assistance to the ISC in coaching, high performance, and other areas. An aim of the NCTC is to provide a world class range of services to coaches, athletes and National Governing Bodies. The NCTC has published a number of position papers that clearly outline their approach. In Building Pathways in Irish Sport, a model of the long-term athlete development history was outlined in six steps:

1. FUNdamental (6-9 years);
2. Learning to train (9-12 years);
3. Training to train (12-16 years);
4. Training to compete (16-18 years);
5. Training to win (18 years or older); and
6. Retirement/retainment.

The approach to participation in the early phases has broad relevance for most pupils in school even if their eventual interest in physical activity is primarily for health or social reasons.

## **Disadvantaged communities**

The Designated Areas Initiative was developed by the ISC to help combat the problems of drug abuse, crime and social exclusion, particularly in areas of social and economic disadvantage through participation in sport. Three NGBs were selected to develop strategies to increase the numbers of young persons participating in three pilot local areas in the sports of soccer, gaelic, and rugby. The Department also works in conjunction with the Department of Community, Rural and Gaeltacht Affairs in funding local sports facilities in disadvantaged areas.

## **Gender**

The Women in Sport Report of the Joint Committee on Arts, Sport, and Tourism, and on Community, Rural and Gaeltacht Affairs<sup>23</sup> recommended that the ISC should implement gender equality strategies in all sports policies. The Committee also recommended “the completion of a national survey to establish the availability and extent of physical education provision for women within formal education, within youth and sport sectors, and within the community”. The July 2004 Report noted that no national survey had ever been undertaken to establish comprehensive data in relation to participation levels of females in different aspects of sport and recreational activity.

These findings are broadly similar to the 1998 Report of the Taskforce on Women in Sport. That report recommended that a national survey should be conducted to examine the availability and extent of physical education provision for children. Among the Report’s findings were:

- ◆ Females were poorly represented at decision-making levels in sport;
- ◆ Females involvement at all levels of sport and recreational activity was substantially less than males involvement; and
- ◆ Young females drop out of recreational and sport activities earlier than young males.

### **3.4.2 Sport data sources**

Survey and administrative sports data holdings funded or owned by the Department or its Agencies are reviewed in this Section. In addition, the physical activity dimension of three closely related surveys funded by the Department of Health and Children are also briefly reviewed.

#### **National Survey of Sport and Physical Exercise 2003**

This survey was carried out during July to September 2003 by the ESRI’s Sports Research Centre on behalf of the ISC. The survey collected data from a nationally representative sample of 3,080 individuals aged 18 years and over using face-to-face interviews. The sample was drawn from the electoral registers. The response rate was 67%. Physical activity levels were self-reported by respondents. There were 269 questions distributed across the following seven sections in the questionnaire:

- A: Spectator activity (12 questions);
- B: Physical participation (125 questions);

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<sup>23</sup> Houses of the Oireachtas, Fifth Report, Women in Sport, July 2004.

- C: Voluntary participation (37 questions);
- D: Reasons for no sports participation (6 questions);
- E: Previous physical activity (39 questions);
- F: Previous voluntary participation (13 questions); and
- G: Personal details (37 questions).

The first report from the survey, on sports participation, was published by the ESRI in late 2004. The remaining results will be published in two further reports: *Voluntary Sports Work and Social Capital*; and *Economic Value of Participation in Sport*.

The scope of the survey was limited to measuring leisure activities. Activity such as walking to work was therefore excluded and thus the results understate the full levels of physical activity being undertaken. The survey results confirmed that even modest amounts of exercise result in significant health benefits. The study estimated that 22% of adults (18 years or over) did not participate in any form of sport or physical exercise in the previous 12 months.

### **Assessment**

The further reports will provide estimates on the economic value of participation in sport, and an estimated valuation of the time spent on voluntary work in sport. No other national survey collects sports expenditure data. The costs of a small number of sport-related items, such as the cost of a sport or recreational season ticket and the cost of any regular subscriptions to a sporting club, are collected in the CSO Household Budget Survey. However the HBS is not an appropriate survey vehicle for collecting more detailed information on the cost of participating in physical activity, as this would involve collecting a considerable amount of extra survey data.

### **Walking Survey 2002**

This survey was conducted by the ESRI on behalf of the ISC during October-November 2002. The survey collected data on participation in any walking activity for recreation, leisure, social or health reasons. The survey was implemented as a module attached to the ongoing monthly ESRI survey of the Irish population. Information on the extent of walking during the previous three months was collected.

The survey population is persons aged 16 years and over living in private households. The survey was administered by telephone using a random digit dialling approach. Valid contact was made with 4,716 persons. A total of 2,431 completed questionnaires were used in compiling the report, which represented a response rate of 52%. There were 13 questions asked in relation to walking.

### **Assessment**

This survey focussed on recreational walking. Walking to work or to the shop, and other forms of physical activity were excluded. The CSO Census of Population 2002 estimated that 11% of persons at work, aged 15 years and over, walk to work or 8.8% of men and 15.0% of women. The data gathering role of this survey was largely subsumed in the broader national sport and physical exercise survey in 2003.

### **School Sports Surveys 2004**

These surveys were conducted around November 2004 by the ESRI on behalf of the ISC. There were four questionnaires used:

- ◆ Primary school sport survey questionnaire (19 questions);
- ◆ Secondary school sport survey questionnaire (30 questions);
- ◆ A questionnaire for primary school principals (19 questions); and
- ◆ A questionnaire for secondary school principals (21 questions).

The primary school sport survey collected information directly from pupils through a guided self-completion paper questionnaire. An interviewer guided the pupils through the questionnaire as they were self-completing them. Completed questionnaires were received from 146 primary schools covering 3,579 pupils. Classes at 5<sup>th</sup> and 6<sup>th</sup> level were the focus of the survey although a small number of younger pupils in mixed year classes also completed questionnaires. The interviewer also collected the height and the weight of each pupil at the end of the class period. The information collected included the following: the gender and class level of each pupil; brief information on the pupil's involvement in sports during games classes, at lunch-time, after school, and with sports clubs; the means of travelling to school; reasons for non-participation; and parents involvement in sports. The geographical location of each school was also identified.

The secondary school sport survey collected quite similar information to the primary school survey using a similar survey methodology. Additional information was collected on the pupil's non-sports activities outside of school and on their attitude to sport. Information on the pupil's height and weight were also collected. Completed questionnaires were received from 86 primary schools covering 3,221 pupils.

The school principal surveys collected information on a wide range of topics including the following: student numbers; sports facilities; timetabled pupil participation opportunities; inter-school sports participation; and involvement with local sports clubs. The secondary school principal questionnaire was more detailed with some distinction made between activities on offer in the junior and senior cycles.

First results from the school surveys will be published by the ESRI around the middle of 2005.

### **Assessment**

School-based surveys overcome many of the difficulties associated with collecting data from young persons through general household surveys. The sample sizes were designed to allow measurement of meaningful differences between schools. It would add to the value of these surveys if the individual pupil questionnaires could be linked to additional data, such as school educational performance and pupil socio-economic situation, that are held in Department of Education and Science databases.

The Department of Education and Science are currently setting up a primary pupil database. This will complement the existing second level pupil database. The ISC should examine the scope for having a small amount of exercise related information collected in these databases. These pupil databases could also be used for follow-up longitudinal studies of the same pupils. For example, some pupils could be surveyed in primary school and then resurveyed a number of years later using the pupil registers to locate them.

### **National Governing Bodies of Sports Questionnaire (annual)**

This questionnaire is completed annually by National Governing Bodies requesting grants from the ISC. The ISC questionnaire for funding in 2005 included the following questions:

- ◆ Details of officers of the NGB; and
- ◆ Membership details.

#### **Assessment**

This is potentially a very valuable data source as it could, for example, provide annual information on the composition of the membership broken down by gender. However, in practice, membership is not defined consistently across NGBs. For example, not all NGBs require participants to be paid-up members of affiliated clubs or of the Association. Given the usefulness of this data and its annual availability, the quality and completeness of the membership figures should be brought to a level where reliable and consistent absolute numbers by gender and by sport could be published. While this may be a difficult task, particularly for smaller NGBs, sample surveys would generally be too small to produce reliable estimates of membership for the NGBs with smaller numbers.

### **International Carding Scheme (annual)**

The International Carding Scheme (ICS) was introduced in 1998 to provide a range of supports, both financial and non-financial, to assist Ireland's most talented players and athletes realise their potential to perform successfully at the highest international levels. Qualification for the Carding Scheme is based on published sport specific criteria that are agreed with the relevant NGBs. Four general classification categories are used to determine the levels of support for which athletes may be eligible:

- ◆ World class levels 1, 2 and 3;
- ◆ International class;
- ◆ Development class; and
- ◆ Junior class – NGB squad support system.

Athletes can apply on an annual basis for funding provided they have met the eligibility performance standards for that particular funding year. Athletes may be supported for up to a maximum of three years in the *Development* category and up to a maximum of five years in the *International* category. As part of the reporting process, recipients must account to the ISC for how they spent the award.

Each year, the ISC publishes the list of athletes who have received funding. This list includes the specific sport that the athlete is receiving funding for, the name of the athlete, and the amount of funding being given. As part of the application process, the athlete also provides personal information such as date of birth and permanent address. Hence it is possible to analyse the composition of this small group of elite athletes by age, gender and geographical location.

#### **Assessment**

This is a valuable and unique data source on Ireland's elite athletes. It would add to the value of the data source if additional analyses of these grants were available showing characteristics such as the age of the athletes and the number of cumulative years that they

have received funding for. It would also be of interest to examine the movement of athletes through the four classification categories (junior, developmental, international, and world class). Such tables would more clearly show issues such as:

- ◆ Gender trends in these awards;
- ◆ Whether attaining elite status at junior level is a good predictor of future senior elite status; and
- ◆ Variation in the effects of age across different sports.

The uniqueness of this database makes it a potential source for informing high-performance policy development in the future through targeted surveys of this group of athletes or as a database for examining issues such as the health effects in later life of elite level training.

### **Anti-doping testing (ongoing)**

The ISC conducts regular anti-doping tests on athletes. The testing began in 1999. The database identifies information such as: the sport, gender, and age (from 2005) of the athlete; whether the test was out of competition; whether the test was done abroad; and the result of the test. The number of tests being taken annually, classified by the specific sports, are published in the annual ISC Anti-Doping Unit report. There were 774 tests carried out in 2003.

#### **Assessment**

This is a unique database nationally as no other organisation conducts such tests. Overall trends in testing numbers and the distribution across sports provide evidence of the seriousness with which Ireland monitors this aspect of sport.

### **Sports support services (ongoing)**

The NCTC provides a range of support services to coaches, athletes and NGBs. Coaches receive certification within the National Coaching Development Programme (NCDP). The NCDP provides a structure whereby coaches can progress from introductory levels of knowledge to international level. At the end of 2003, 27,278 coaches had been trained. These coaches represent the full range of sporting bodies in Ireland.

As part of the ISC International Carding Scheme, the NCTC coordinates a 340 members sports science and medical support network of accredited service providers in sports medicine; physiotherapy; psychology; physiology; nutrition and biomechanics. The NCTC collects data relating to the qualifications and areas of specialisation of these service providers. Over 2,000 service provision claims are processed each year in respect of services provided to Ireland's carded athletes by the Sports Science and Medical Support Network.

The NCTC maintains an up-to-date database that allows ongoing monitoring of the use of each support service both at the individual athlete level and by sport. The athletes service provision claims, in practice, mainly relate to physiotherapy rather than use of the more technical services such as biomechanics and nutrition.

#### **Assessment**



These services span the range from general coaching to specialist medical services for elite athletes. The statistics on the take-up of the services and the results of physiological testing are key elements in an overall high-performance sport policy information framework.

### **Capital Grants to Sports Facilities**

These grants are allocated by the Department annually. The Programme began in 1988 but the amount of funding allocated has increased significantly since 1999. The grants are funded by the National Lottery Sports Capital Programme. Proposals for the development of sport and recreational sport facilities from sports organisations, clubs and community groups are considered for funding with special consideration given to the development of facilities in disadvantaged areas. The application form includes questions on topics such as:

- ◆ County location;
- ◆ Type of sport or activity;
- ◆ National Governing Body;
- ◆ Nature of the development (dressing rooms, sports hall, floodlighting etc.);
- ◆ Disability access;
- ◆ Designated disadvantaged status;
- ◆ Projected usage by age and gender; and
- ◆ Multi-sport access.

The names of the annual grant recipients and the amount awarded are published on the Department website. The total allocation in 2004 by sport was around €60 million. Department figures on the usage of the allocations show that around one-third of total allocations have not yet been drawn. This represents around €125m over all years.

The Department of Community, Rural and Gaeltacht Affairs (DCRGA) also makes capital grants to some sports facilities in disadvantaged rural areas under the CLÁR, RAPID and dormant account programmes. The 2003 allocations under the CLÁR and RAPID programmes were relatively small but there is a significant budget available under the dormant account fund (around €60m). Disadvantage is broadly defined as Electoral Divisions (ED) that have experienced a population loss of more than 50 per cent between the 1926 and 1996 censuses.

### **Assessment**

These schemes provide a very valuable source of funding for sport in Ireland. A key aim of the Department is to encourage multi-sport usage of facilities. Allocations to Community and mixed sports applications represented around one-third of the total 2004 allocations, which represents very significant progress towards that goal. Tabular analyses of the grants by sport, type of development, and amount of allocation actually drawn down should be published.

The definition of disadvantage is based on a fall in the local population numbers. Given that the local sports facilities are being built to encourage increased and ongoing participation in physical exercise, the Department should examine with the DCRGA the effectiveness of the current definition for sport. For example, the age profile of disadvantaged EDs is likely to be significantly older than for EDs where the population is increasing.

## **Audit of local sports facilities**

The Programme for Government 2002 contained a commitment to undertaking a national audit of local sports facilities during 2005-2006. Such an audit presents an opportunity for gathering useful information such as:

- ◆ An inventory of sports facilities classified by location and sports using the facility;
- ◆ Physical information on these facilities such as the extent of disability access and the availability of changing rooms for use by both sexes; and
- ◆ Detailed geography information such as geo-coordinates to allow location mapping of the facilities.

As part of the ISC Local Sports Partnership Scheme, audits have already been undertaken in some areas of the country. For example, a detailed survey was undertaken by the Westmeath County Development Board in 2002 with 392 questionnaires sent to sport and recreation organisations and facilities, as well as to first and second level schools. The objectives of the survey were:

- ◆ To quantify existing and proposed sport, recreation and leisure facilities in the county;
- ◆ To establish the geographical spread of these facilities;
- ◆ To identify gaps in provision;
- ◆ To examine usage of facilities;
- ◆ To assess accessibility, availability and affordability of facilities;
- ◆ To assess barriers to participation; and
- ◆ To assess the sport, recreation and leisure needs throughout Westmeath.

Before commencement of the survey, Westmeath County Council established a database of sport, recreation and leisure clubs and facilities in existence in the county. This comprised 44 different activities involving over 290 clubs and organisations. For example, 49 GAA clubs, 2 athletic clubs and 8 pitch and putt clubs were identified.

## **Assessment**

This information will assist the Department to identify shortages of sports facilities. Given that there is no national register of facilities, such a survey may be more successfully managed centrally but conducted locally using a nationally agreed questionnaire. The Geo-Directory maintained by An Post and the OSi is a potentially useful input into the audit. This directory is a register of all address points in the State. There are current plans to business code it. If the category *sport and leisure activities* was allocated a separate business code then this would provide a starting point register for the audits which could be updated during the fieldwork.

## **Success factors of High-Performance Players and Athletes 1998**

This survey was carried out by the National Coaching and Training Centre. The study concentrated on the perceived supporting and inhibiting factors in the careers of 207 athletes. The study provided an evaluation of the first-year of operation of the ISC Carding Scheme for players and athletes. A 13 item questionnaire was used. The sample comprised 144 male participants and 62 female participants (there was 1 non-response to the gender question). The survey provided additional useful information such as the age at which athletes specialised in their chosen sport and how they were introduced to the sport.

## Assessment

Occasional specialised surveys, such as this, provide valuable information for planning future service delivery and for identifying changing circumstances which may require a partial relocation of the delivery of the critical success factors for each sport to places such as third-level colleges.

### **Survey of Lifestyles, Attitudes and Nutrition (SLÁN) 2002**

This survey was conducted in 1998 and 2002 by the Centre for Health Promotion Studies in Galway and was supported by the Department of Health and Children. The sample was randomly selected from the electoral register. From an initial selection of 13,933 names, an eventual valid sample of 11,212 was included in the survey with a response rate of 53%.

The 39 pages questionnaire has 9 sections. Section B contains three questions on leisure activities. The survey found that just over half of all adults (51%) reported some form of physical activity with marked differences according to gender and educational status. Men and persons with higher educational attainment were more active.

### **Health Behaviours in School-aged Children (HBSC) 2002**

This survey was conducted in 1998 and 2002. The same survey is conducted in 28 other countries under the guidance of the World Health Organisation. The 2002 survey was conducted by the Centre for Health Promotion Studies in Galway and was supported by the Department of Health and Children. Individual schools within regions were first randomly selected and class groups were subsequently randomly selected. In primary schools, both 5<sup>th</sup> and 6<sup>th</sup> class groups were included. In post-primary schools, all Junior cycle classes and the first post Junior cycle year were included.

A total of 347 schools were included in the survey and there was a final response rate of 51% (176 schools). In pupil terms, 5,712 responses were used to compile the results. The questionnaire has 15 sections. Section 5 contains two questions on physical activity.

### **National Survey of Involvement in Sport and Physical Activity 1994**

The *National Survey of Involvement in Sport and Physical Activity* was the first dedicated national survey of sports participation in Ireland. The survey was carried out by Irish Marketing Surveys on behalf of the Departments of Health and of Education. Face-to-face interviews were carried out with 2,000 people in March 1994 followed by a further 1,300 in August of the same year. Respondents were aged 16 years and older.

Questions were asked about participation in sport over the last 12 months, last 2 months, last month, and last week. Questions were asked on the frequency of participation, time spent participating, reasons for participation, reasons for non-participation, whether played competitively or not, level of competition, whether involved in coaching or being coached, and the importance of school in providing a foundation for sport. More general questions were asked about facilities for sport, satisfaction levels relating to government support for sport, and health-related lifestyle issues such as drinking alcohol and smoking.

### 3.4.3 Other data sources on Sport

This Section briefly examines a number of international surveys to provide a broader context for the Conclusions and Recommendations Section.

#### **Pilot Time Use Survey 2005**

Time Use surveys are conducted occasionally by all countries in the EU except Ireland. In Ireland, the CSO conducted a small-scale pilot survey in 1997 and a light form of the time-use survey questionnaire was tested in a pilot survey carried out on behalf of the Gender Equality Unit (GEU) of the Department of Justice, Equality and Law Reform. While physical activity is not the primary focus of such a survey, such data are collected indirectly.

#### **Assessment**

Detailed time use surveys are expensive to undertake and are demanding on respondents. However the light forms of the survey also provide useful data. A particular value of such a survey is that the results place the time spent on sports activities in context with other activities taken part in during the day. Results from a time-use survey would also allow an examination of the socio-demographic situation and activities of persons not partaking in sport and exercise activity.

#### **Eurobarometer survey 2004**

This was an EU-wide survey<sup>24</sup> carried-out during October and early November 2004. The survey covered persons aged 15 years or over. The survey was conducted in Ireland by MRBI with a sample of 1,000 persons. The surveyed contained a special sports module of 8 questions. The report also briefly examined the reasons for non-participation (lack of time was the principal reason).

#### **Participation in Exercise, Recreation and Sport in Australia 2004**

The Exercise, Recreation and Sport survey<sup>25</sup> (ERASS) was first conducted in 2001. The ERASS collects information on the types of activities that persons aged 15 years and over have participated in during the 12 months prior to interview. The two-page questionnaire has 17 questions. Participation is restricted to active 'playing' participation and does not include non-playing participation such as coaching, refereeing and spectating, or activities that are related to work or household chores. The survey is conducted annually and the data are analysed by the Australian Bureau of Statistics. The annual results are compiled by aggregating the results from four quarterly surveys. All interviews are conducted by telephone and one person was randomly selected for interview in each dwelling. The total 2002 sample used to produce estimates was 13,632 persons.

The results can be cross-classified by age, sex, region, employment status, marital status, presence of children in the household, educational attainment. A distinction is made between organised and non-organised activities. The frequency of participation in each sport is given. The actual numbers of persons participating in each of 54 different sports and physical activities are given in the report.

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<sup>24</sup> [http://europa.eu.int/comm/public\\_opinion/archives/ebs/ebs\\_213\\_report\\_en.pdf](http://europa.eu.int/comm/public_opinion/archives/ebs/ebs_213_report_en.pdf)

<sup>25</sup> <http://www.sport.act.gov.au/docs/ERASS02final.pdf>

## **3.5 Conclusions**

### **3.5.1 Tourism**

The Department, Fáilte Ireland and Tourism Ireland strongly recommend the production of a regular TSA. The tourism industry would benefit from such an account. Eurostat has defined the concepts and recommended methodologies for a tourism satellite account and at present are discussing the issue of making the regular reporting of TSAs mandatory by Member States statistical offices.

The following recommendations are being made taking into account the recommendations made in the pilot TSA report.

#### **Establish a new survey of domestic same-day visits within Ireland**

The TSA project highlighted a need for data on domestic same day visits within Ireland. Given the importance of this type of tourism, this lack of data represents a significant gap in tourism statistics. Consideration should be given to establishing a new survey of households similar to the Household Travel Survey. Trips lasting 3 hours or more (with no overnight stay) and not taken on a regular basis could be defined for the purposes of a same-day visit. Data collected could include destination, expenditure details (e.g. food, alcoholic and non-alcoholic drink, clothes, admission fees, fuel, parking charges and other shopping), mode of transport, activities engaged in, duration in hours, distance travelled and size of travelling group.

Such a survey of households could also provide a regional dimension to the results. The survey would also provide information on Irish cross-border day-trippers.

#### **Tourist expenditure estimates**

At present, the CSO collects the total expenditure of an overseas visitor whilst in Ireland and the total expenditure of an Irish-resident visitor abroad. Fáilte Ireland, via the Survey of Overseas Travellers, collects more expenditure detail of an overseas tourist to Ireland. The type of detail collected includes package costs, other advance payments, bed and board, other food and drink, entertainment, transport within Ireland, shopping and miscellaneous expenditure. However, no expenditure breakdown is currently available for our domestic tourists and same-day visitors (whether domestic or overseas).

The CSO Passenger Card Inquiry should be modified to include greater expenditure detail of overseas visitors. This would provide the detail currently obtained from the FI SOT. The Household Travel Survey could also be enhanced to ask for more expenditure detail of Irish tourists. The proposed same-day visits survey would capture detailed expenditure on this part of our domestic tourism (see above).

This additional expenditure detail would be invaluable in the production of National Accounts Input-Output tables and would improve the domestic portion of the CPI weights.

#### **Cross-border tourism**

Cross border tourism is at present inadequately measured in the official statistics resulting in an underestimate of the contribution of tourism to the Irish economy. During 2004, the CSO worked in co-operation with the NITB to try and unravel the discrepancies between the limited CSO data and the data held by the NITB. Both the CSO and FI and TI recognise that the present situation needs to be urgently addressed.

The TSA also recommended that a common approach between the NITB and the CSO should be adopted to allow reliable and consistent estimates of cross border tourist traffic to be made for the construction of an all Ireland TSA.

### **Improve the calculation of gross capital formation in tourism**

The TSA recommended that data on gross fixed capital formation in tourist related sectors needs to be collected and reported separately in the national accounts. National Accounts includes data on capital formation in tourism as part of an overall figure for building and construction investment. However, it is possible to obtain information on tourism separately. These data are supplied by the Department of the Environment, Heritage and Local Government and covers expenditure on the construction and development of hotels, holiday accommodation, resorts and other amenities and tourism infrastructure. The estimates are based on tourism related projects carried out by the Office of Public Works and partly on the Public Capital Programme allocations for Fáilte Ireland. An estimate of the value of ICC fixed asset loans for tourism related projects is also included. Private sector investment is based on the Fáilte Ireland register of hotel accommodation and assumptions on the cost of construction per additional room added to the stock of rooms in the state within a year. This part of the estimate should be reviewed with a view to including any additional information that might be available from the Fáilte Ireland grant schemes.

### **Domestic leg of the journey of Irish resident visitors abroad**

The HTS should be modified to capture the domestic leg of the journey of resident tourists from the point of view of the number of days and expenditure spent on the leg. The CSO is testing this issue in a revised pilot HTS form for the Q2 2005 quarter.

### **Country of Residence Survey**

The CSO CRS should be developed with the aim of providing more detailed country (rather than continent) of residence data. The survey should be expanded to include the new regional airports also.

### **Improve and expand the Passenger Card Inquiry**

The PCI provides good population data and is the main input to the Balance of International Payments estimate of tourism earnings. However, it should be revised in the context of the more recent HTS, which now provides similar and more detailed information on domestic tourists. It should not ask the same questions of domestic tourists as the HTS. The PCI should be modified and used to collect more information on non-resident overseas visitors. Information on activities used, the regions/counties visited and a more detailed expenditure breakdown should be collected. Characteristics such as gender, age, usual residence, nationality, marital and family status should also be asked. This would provide the information currently collected by Fáilte Ireland's SOT but using a much larger sample. This could then allow Fáilte Ireland to concentrate its surveys on its smaller markets. The above

modification would also provide information on the regions visited by overseas visitors to Ireland.

The focus in the PCI on the route of travel (e.g. air cross-channel) should be switched to the countries of origin and destination of the trip.

The coverage of the PCI should also be expanded to include the new regional airports.

### **Develop a comprehensive register of tourism businesses**

In conducting the tourism business and employment survey, visitor attractions and hotels surveys, Fáilte Ireland have built up a large information base of tourism business units. Allied to this information, is the database of grant recipients within Fáilte Ireland. It would be ideal if all of this information could be combined into one register using a unique identifier for each unit and a variable for the type of business unit, e.g. hotel, restaurant. This database could be systematically updated regularly with direct input from the Regional Tourism Authorities. It would provide the framework for any further analyses of the sector in the future.

The grant recipients' information could be tabulated to show projected and actual spending on tourism projects on a periodic basis and on a regional basis. This would be a valuable tool in formulating and adjusting regional policies.

At present, the CSO maintains a register of business enterprises for the economy as a whole, including a register of accommodation, restaurants, bars and catering service enterprises. Each year, the Annual Services Inquiry is conducted and includes an inquiry into the hotel, bar, restaurant, canteens and catering sector. The main variables collected include turnover, purchases and wages and salaries paid to employees and number of employees. However, no information is published on the unregistered accommodation sector, since this sector is very difficult to cover and maintain.

The CSO construction of a full register of accommodation units (including the unregistered sector, e.g. unapproved B&B's) has proved impractical in the past. As an alternative solution, it seems more practical to concentrate on the registered sector.

### **Compile a tourism price index**

It might be possible to compile a tourism price index using the expenditure weights from the revised PCI along with the prices of a basket of goods and services consumed typically by tourists. The latter basket of prices could be taken from the existing CPI.

#### **3.5.2 Arts**

From a policy context, the main recommendations relate to:

- ◆ The establishment of a Working Group on Culture Statistics;
- ◆ Agreement on a cultural statistics framework; and
- ◆ Increased availability of statistical information on cultural activities.

Liaison Groups are already established in more developed areas of national statistics. However the proposed working group would have a broader initial role of assisting the CSO

in formulating a strategy for the development of cultural statistics including agreement on a working framework.

From the summary analyses presented in this report, it can be seen that there is a broad range of potentially available cultural statistics but that considerable work needs to be done to be able to publish these on a regular basis using a consistent series of definitions.

There are no EU wide dedicated cultural surveys that are carried out by all the national statistical offices. Instead data collection has been through the reuse of existing national surveys (e.g. labour force surveys) or through occasional studies. Eurostat is in the process of finalising the contents of a new Adult Education Survey questionnaire with EU Member States. The new survey will be held every four years commencing around 2010 and will be conducted by the CSO. A pilot survey will be conducted by the CSO in 2007. The draft questionnaire contains a section on language skills and on cultural participation. There are 14 draft questions on culture:

- ◆ Number of times going to live performances (plays, concerts, operas, ballet and dance performance);
- ◆ Number of times going to the cinema;
- ◆ Number of visits to cultural sites;
- ◆ Number of times attending live sport events;
- ◆ Recent involvement in activities such as playing an instrument, composing music, and singing and dancing;
- ◆ How many books do you have at home; and
- ◆ Do you read newspapers.

The CSO is working with Government departments on an ongoing basis to increase the value of statistics that can be derived from administrative sources. The CSO is also assisting Departments with the development and implementation of their Data/Statistics Strategies. Both of these initiatives will provide further future opportunities to develop cross-departmental cultural statistics.

The CSO is developing a new release on cultural statistics that will be published annually. The contents of this release are likely to evolve over time as more and better quality cultural statistics become routinely available from administrative and survey sources. The initial contents will focus on attempting to present some overall summary tables on employment, expenditure and participation in cultural activities and some more detailed tables classified by an agreed set of cultural domains such as the core set used by Eurostat.

Over time, the significant data gaps will become more apparent and consideration can be given to how best to collect data in those areas. Opportunities such as the cultural part of the new Adult Education Survey will provide a means to collect statistics to fill the data gaps that have been identified as priorities by the proposed Working Group and by users of cultural statistics.

### **3.5.3 Sport**

The policy context section was presented under five headings: sports facilities; participation including voluntary work; high performance; disadvantaged communities; and gender. The conclusions and recommendations are broadly summarised within that framework although allowance should be made for overlap across these dimensions. Two additional categories on funding and dissemination have been added.



## Sports facilities

The planned audit of local sports facilities will establish an inventory of sport and leisure facilities, and information on their location and ownership. This audit is a unique opportunity to document the current infrastructural situation, and to direct future investment in facilities. It is also an opportunity to collect ancillary information such as access barriers to participation. Broad consultation with other Government Departments and Agencies should be undertaken before the audit questionnaire is finalised.

In the Capital Grants to Sports Facilities Programme, statistics on funds allocated and funds drawn should be published by county and by sport. The Department should review the barriers faced by some sports in availing of these grants, and the reasons why some recipients fail to use the full allocation.

A recent European Commission Eurobarometer survey<sup>26</sup> asked interviewees why they did not practice a sports activity. The result for Ireland showed that 31% cited a lack of time as the reason. EU-wide, access to facilities was only cited by 3% of respondents as the reason for non-participation. This finding suggests that providing facilities locally is only part of the solution to achieving higher participation levels. Further information on the main factors inhibiting regular participation should be collected.

## Participation including voluntary work

The need for a representative national survey that would establish some baseline figures has been mentioned in a number of reports, and represents a key policy need of the Department's Management Advisory Committee. An overview of the main sports surveys being conducted nationally is presented in Table 3.1. Considerable progress was made recently in expanding the amount of available statistical information on sport and physical activity.

**Table 3.1: Statistical coverage of selected national sports surveys**

Data source	Survey unit	Population	Sample size	Response rate
Sport and physical exercise, 2004	Person	18 years or older	3,080	67%
Primary school survey, 2004	School	5 <sup>th</sup> and 6 <sup>th</sup> classes	146 schools 3,579 pupils	
Secondary school survey, 2004	School	1 <sup>st</sup> to 4 <sup>th</sup> classes	86 schools 3,221 pupils	
Slán 2002	Person	18 years or older	11,212 <sup>27</sup>	53%
HBSC 2002	School	Pupils aged 10-17 =5 <sup>th</sup> and 6 <sup>th</sup> classes +1 <sup>st</sup> to 4 <sup>th</sup> years	347 schools 8,316 pupils	51% of schools 5,712 pupils
Recreational walking 2002	Person	16 years or older	4,716 persons	52%
QNHS sport module 2006	Household	15 years or older	24,000 households 45,000 persons	Around 90%

Survey data need to be supported by additional statistics based on administrative sources. The key potential source of administrative statistics is the ISC NGB database. The ISC

<sup>26</sup> The Citizens of the European Union and Sport (November 2004).

<sup>27</sup> The initial sample from the electoral register was 13,933. After persons no longer living at that address or deceased were excluded, the valid sample was 11,212.

should work with the NGBs to gain acknowledgement of the importance of the membership data they provide.

The table also includes provisional details on the planned CSO QNHS Q3 2006 module on sport and social capital. The sample size for this survey may be around 24,000 households which represents a sample of 45,000 persons aged 15 years or older. Given the size of this survey and its one-off nature, it is important that policy-makers work with the CSO to ensure that the set of questions included in the module gather data that inform the highest priority data needs.

Responses to QNHS questions can be cross-classified with other data collected as part of the survey such as age, gender, marital status, family status, employment situation etc. The inclusion of one question on participation in exercise and physical activity on an ongoing basis in one wave<sup>28</sup> of the QNHS would provide ongoing and consistent statistics on participation.

Progress needs to be made at EU or international level to agree definitions on issues such as what constitutes a sport, leisure or recreation activity. This is a critical step in obtaining comparable international data on participation levels.

### **High performance**

A number of the data sources reviewed in Section 3.3.3 are specific to high performance sport. The statistical data available from these schemes should also be published in a more summary format. In addition, there is a need for occasional specific surveys of elite athletes along the lines of those already conducted by the NCTC. Such surveys could, for example, collect more specific information on the living situation of elite athletes and on changing critical success factors.

### **Disadvantaged communities**

In relation to sports facilities, responsibility for ensuring that the needs of disadvantaged communities are adequately addressed is shared with the DCRGA under the CLÁR, RAPID, and dormant account Programmes. Such communities are defined on the basis of decreases in population. For sports purposes, alternative approaches to defining disadvantage should be examined.

### **Gender**

The increase in survey activity and the development of the administrative data sources will result in an increased amount of gender-disaggregated information. However there may also be a need to collect some specific gender information such as barriers to participation. These can range across perceptions, attitudes and issues such as the availability of family-based activities, childcare and transport that may disproportionately affect women. An analysis of the availability of sports facilities and programmes classified by school type should also be conducted.

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<sup>28</sup> One-fifth of the sample.

## Funding

The nature of the funding of Irish sport is such that it is difficult for researchers to aggregate the total public funding on sport and physical activity by the Department, its Agencies, and closely related bodies such as the Department of Community, Rural and Gaeltacht Affairs. These difficulties arise through revised and delayed payments made through the main funding schemes, and through the existence of exceptional and strategic funding of particular sports or NGBs. From a policy and user perspective, it would also be of benefit if each organisation maintained up-to-date information of its annual expenditure on sport.

## Dissemination

There is a wide variety of sport and exercise administrative data available on an annual basis. It would be useful if this were brought together into an annual statistical release. Examples of existing data holdings that could contribute to such a release include:

- ◆ Department sports capital grants programme;
- ◆ ISC NGB annual application form;
- ◆ ISC International carding Scheme form;
- ◆ ISC anti-doping testing programme;
- ◆ NCTC support services network;
- ◆ NCTC service provision claims;
- ◆ NCTC coaching programme; and
- ◆ Available survey data.

Making the existing data more readily available in tabular form would assist the Department and its Agencies to formulate, and monitor progress towards achieving their policy goals.

### 3.6 Summary of recommendations

This Section contains the main recommendations on tourism, culture and sport in a summarised format. For more detail and background information on a particular recommendation, please see the Conclusions Section 3.5 and the policy and data source review sections.

**Recommendation 1:** The CSO in conjunction with the Department and its Agencies should produce an annual Tourism Satellite Account. As part of the compilation of this account, the CSO should further develop its tourism statistics on: domestic same-day visits within Ireland; cross-border tourism; the calculation of gross fixed capital formation in tourism; and expenditure during the domestic leg of visits by Irish residents abroad.

**Recommendation 2:** The CSO should examine ways to improve the quality of their estimates of the numbers and expenditure of visitors to Ireland from and via Northern Ireland.

**Recommendation 3:** The CSO Passenger Card Inquiry should be developed to collect greater detail on the expenditure of and socio-demographic profile of visitors to Ireland. The PCI should also collect information on the regions visited by tourists.

**Recommendation 4:** The CSO Country of Residence survey should be used to collect more detailed nationality data on visitors to Ireland. The coverage of the survey should also be extended to include the new regional airports.

**Recommendation 5:** The Department and its Agencies should develop a comprehensive register of tourism businesses and make this available to the CSO.

**Recommendation 6:** A Working Group on cultural statistics should be established by the CSO. The Group should advise the CSO on a framework for cultural statistics and on priorities to increase the availability of statistical information on cultural activities.

**Recommendation 7:** The CSO should work together with the Department and with the Irish Sports Council in the compilation of a new annual sports statistics release based on administrative sports data held by the Department and its Agencies.

**Recommendation 8:** The CSO should proceed with its intention to include a Sports and Social capital module in the Q3 2006 QNHS. A working group should be established to assist the CSO in the compilation of the questionnaire. Arising from this work, the CSO should examine the possibility of including a question on participation on an ongoing basis in one wave of the QNHS.

**Chapter 4**  
**Department of**  
**Communications, Marine**  
**and Natural Resources**

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## 4.1 Introduction

The Department of Communications, Marine and Natural Resources (DCMNR) was established in June 2002 as a result of a restructuring of a number of Government Departments. The Department has a wide-ranging economic remit embracing communications, broadcasting, energy, marine and natural resources. Its mission is:

*“to promote the sustainable development, management and regulation of the communications, energy, marine and natural resources sectors in support of national economic and social policy objectives”.*

The Department’s business areas comprise:

- ◆ Communications
- ◆ Broadcasting
- ◆ Energy
- ◆ Maritime Safety and Irish Coastguard
- ◆ Maritime Transport
- ◆ Marine Tourism and Leisure
- ◆ Seafood
- ◆ Coastal and Fisheries Infrastructure
- ◆ Coastal Zone Management
- ◆ Research (Marine, Forestry, Hydrocarbons, Energy)
- ◆ Hydrocarbons and Minerals Exploration and Development
- ◆ Geological Survey
- ◆ Inland Fisheries.

The Department has responsibility for 31 commercial, non-commercial and regulatory State bodies, 10 Port Companies and 14 Harbour Authorities.

Given the broad remit of the Department, it has a wide range of cross-departmental interactions on social and economic policy strategies. Areas of collaboration on integrated policy delivery include work with: the Department of Transport on an integrated transport policy; the Department of the Environment and Local Government on the *National Spatial Strategy* and national sustainable development policies such as the *National Climate Change Strategy*; the Department of the Taoiseach and other Departments on the development of the Information Society; and the Department of Enterprise, Trade and Employment on trade growth (seafood sector).

Competitiveness is a key Government priority and a central theme of the Department’s strategy. The energy, communications and maritime transport sectors play a vital role in enhancing national competitiveness through providing infrastructure capacity, connectivity and access.

As part of the Department’s ICT strategy, the information technology systems in DCMNR are undergoing major changes at present. An Integrated Corporate Data Model is under development that will provide centrally maintained core databases as well as sector specific databases. Common data will be stored in the central databases – this will minimise duplication and allow sharing of data within the Department. The main sectoral database that was identified to us as relevant to this project was the IFIS system which will contain all information pertinent to the administration and enforcement of Sea Fisheries – see section 4.4.2 for further details.

At an initial meeting with the Management Advisory Committee of the Department, it was agreed that a presentation on the background, aims and scope of the project would be given to all Department staff from Heads of Function level upwards. Subsequent to this presentation, the CSO team met with the Heads of Function (or representatives) to explore in more detail the relevance of each business area to the project. As a result of these meetings, the team decided to focus on six areas - Communications, Energy, Maritime Transport, Seafood, Hydrocarbons and Minerals Exploration and Development and Geological Survey. The team also met with a number of the agencies and regulators that fall under the aegis of the Department.

Due to the diverse nature of the Departments responsibilities, each broad sector is addressed separately below.

## **4.2 Communications and Broadcasting**

### **4.2.1 Introduction**

The communications sector has been driven by large change in recent times due to technology development, social and economic change, and regulatory reform. The advent of the mobile sector during the 1990s, the penetration of the internet into business and everyday life, and the deregulation of the communications sector are examples of the sweeping changes that have characterised the sector over the past decade. The sector is of fundamental importance to the economy and is a significant factor in determining national competitiveness.

The main challenge facing policy-makers in the DCMNR is to create an environment that ensures growth and profitability in the sector in order to position Ireland as a globally competitive information and knowledge society. The Department also aims to address specific priority public policy issues such as the digital divide, environment issues, research and development and spatial planning. Strategic objectives considered relevant to this project are (1) to place Ireland on a competitive par with key comparator OECD economies in terms of key internet and communications benchmarks, including price, quality and choice and (2) to promote increased Information Society inclusion at both regional and community-based levels.

The Commission for Communications Regulation (ComReg) was established in June 1997 (known as the Office of the Director of Telecommunications Regulation until December 2002) in advance of the telecommunications liberalisation of December 1998. It is the statutory body responsible for the regulation of the electronic communications sector (telecommunications, radio communications and broadcasting transmission) and the postal sector.

Other bodies in the communications sector under the aegis of the DCMNR which were considered out of scope for the purposes of this project include An Post, Digital Hub Development agency and Media Lab Europe.

In the broadcasting sector, the Department has a key role in developing a framework for broadcasting in an environment of rapid technological development. It aims to develop a policy and legislative framework to facilitate the provision of quality broadcasting services in Ireland, and to optimise the opportunities presented by the emerging technologies for the provision of new Irish-based broadcasting services.

The Broadcasting Commission of Ireland, which operates under the aegis of the Department, is responsible for licensing independent broadcasting services, developing and

monitoring codes and rules in relation to programming and advertising standards, research and development of broadcasting policy and performing an advisory service and information role for those involved in the sector and the public at large. RTE and the Broadcasting Complaints Commission were considered out of scope for the project.

#### 4.2.2 Data holdings

No significant primary statistical data holdings were identified within DCMNR's Communications divisions.

ComReg, as the telecommunications regulator, collect and compile a broad range of information on the sector. The following primary data holdings were identified as being relevant to this project:

◆ ***Register of telecommunications and postal operators***

ComReg maintains a list of all operators in the telecommunications and postal sectors. Name and address details are stored. There is no other identifier used.

◆ ***Quarterly Key Statistical Data***

ComReg collects data on a quarterly basis from authorised or licensed telecommunications companies by means of a detailed postal questionnaire. Separate questionnaires have been designed for fixed and mobile operators. The following information is collected in this inquiry:

- numbers of subscribers (fixed, mobile, Internet, broadband, cable TV, etc) for each telecommunications operator;
- revenues (fixed, mobile, Internet, broadband, cable TV, etc) for each telecommunications operator;
- traffic/volumes (by minutes) data (fixed, mobile, Internet, broadband, etc) for each telecommunications operator;
- market share data (% shares of each telecommunications operator in specific segments based on analysis of subscribers, revenues and/or traffic).

◆ ***Annual Market Analysis data***

As part of ComReg's obligations under EU law to investigate specific markets with a view to determining if specific operators have dominance in that sector, ComReg collects very detailed primary statistical data from authorised operators on an annual basis. Operators are required to submit data that are similar to but more detailed than the quarterly key data outlined above. A questionnaire will be sent to operators in 2005/2006 to compile new market analysis data.

◆ ***Survey/market research data***

In order to supplement primary statistical data collected from operators, ComReg commissions a number of market surveys on either an annual or quarterly basis. These surveys are based on interviews with end-users of telecommunications services. The survey methodology is based on an interview (either by telephone or face-to-face) with a panel of respondents who are asked a number of quantitative and qualitative questions about their use of and access to communications services.

A household telecommunications survey is conducted annually to measure consumer usage, attitudes and satisfaction trends in the area of residential landline services,



mobile market, payphone services, directory enquiry services, and general attitudes to telecommunications. Around 500 CATI (Computer Assisted Telephone Interviews) are conducted with adults aged 15 and over with a landline telephone in the household. Quotas on age, sex, region and social class are employed in order to attain a representative sample of the adult population.

A second household telecommunications survey is conducted annually to measure computer ownership and usage, Internet usage and connection type, e-commerce and m-commerce activities. Around 1,000 face-to-face interviews are conducted for this "Consumer TrendWatch" survey. The sample is chosen to be nationally representative in terms of age, sex and marital status.

Business surveys covering corporate and SME units are also conducted to determine levels of business access to the Internet, the spend on telecommunications, the Internet applications used and levels of satisfaction with service providers (telecommunications and postal). Employment and turnover data are also collected in this survey.

The companies who are commissioned to conduct these surveys generate presentations to ComReg in Microsoft PowerPoint based on the data collected via interviews. Only aggregate tables have been provided to ComReg to date. ComReg plans to take ownership of the micro-data in the future.

The results of the surveys conducted by both ComReg and external bodies are published by ComReg in quarterly reports<sup>29</sup> which are available on the ComReg website. At the time of writing this chapter, ComReg had issued a consultation paper on the format and content of the Quarterly Market Report.

ComReg currently stores a range of secondary data which have been compiled from a number of sources both electronic and paper-based. These secondary data relate to statistics and performance indicators for other telecommunications markets primarily in Europe. These data are useful as they allow ComReg to benchmark and compare the performance of the Irish market with other markets, particularly with regard to the development of competition in terms of subscriber growth and tariffs.

At the time of writing this report, ComReg had issued an invitation to tender for the provision of a data warehousing and analysis system. The IT solution proposed should allow ComReg to import all the above data (both retrospectively and going forward) into the data warehouse. It is proposed that the data warehouse be linked to an analytical tool to provide ComReg staff with an effective report writing capability. The requirement for an automated interface between data questionnaires and the data warehouse is also specified in the tender document. At present ComReg staff manually enter data submitted by operators into the master database. The new system will facilitate easy electronic submission of data by operators which can be imported into the database and analysed with the minimum of effort.

The Broadcasting Commission of Ireland (BCI) collects information from each of its licensed commercial services under the 1988 Broadcasting Act. This information includes employment levels and advertising and sponsorship revenues. The information is published in aggregate form in the BCI annual review.

The BCI is a member of the JNLR (Joint National Listenership Research) committee, which is responsible for the commissioning and control of radio audience research in Ireland. The

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<sup>29</sup> Irish Communications Market: Quarterly Key Data, Irish Communications Market: Quarterly Market Commentary – ComReg.

information is collected and co-ordinated by TNS MRBI. Information collected includes household ownership of radio equipment, extent of listening to radio, stations listened to, listenership patterns by time and date and special interest group information. The JNLR results are issued every three months, with the BCI issuing a press release to accompany these. More detailed results are available from BCI on an ad-hoc basis.

### **Statistical potential of data holdings**

The availability of ComReg survey results at enterprise and household level enables comparison of trends with comparable CSO survey results. CSO survey data, which are characterised by larger sample sizes and employ best practice survey processing methods and concepts, should be considered the definitive results. It is recommended that the ComReg survey data be benchmarked to CSO results where appropriate.

The ownership of micro-data (i.e. raw data) collected by external companies on commission for ComReg (or the Department) should rest with the commissioning body to allow further processing and analysis to be done and to enable quality checks on the data. All intellectual property rights associated with the commissioned survey should also be owned by the commissioning body.

Enterprises should be identified by a unique identifier (even for small data holdings). The identifier should be a commonly used identifier to enable comparisons across sources and over different time periods.

The usage of standard CSO classifications should be promoted in the framework of ComReg's internal and external surveys on individuals and businesses. Standard classifications enable cross-sectional analyses across different data sources.

#### **4.2.3 Data needs**

Existing DCMNR data needs are largely serviced by ComReg and CSO data and by international statistical data (from Eurostat, OECD, etc). The Department has indicated that the availability of data on broadband usage by type of connection is critical for its policy needs. The information collected in the existing CSO annual household and enterprise surveys on ICT and the ComReg surveys generally meets requirements but, because the area is rapidly expanding, the Department would like results made available on a more timely basis. ComReg is consulting with the Department on this matter as part of a review of its quarterly data collection.

Future needs identified by ComReg are listed in Appendix 3. Some of these needs can already be met from existing CSO data. The annual enterprise and household ICT surveys conducted by the CSO will provide some of the indicators identified by ComReg. The CSO *Household Budget Survey* will provide data on the spend on ICT by households, which is another requirement of ComReg. Some requirements will be met by the CSO providing additional more detailed analysis of its data, e.g. more detailed information from the *Consumer Price Index* on the telecommunications sector will be made available to ComReg.

There is also a need for the CSO to provide assistance to ComReg on statistical methodology and guidance on the use and interpretation of CSO results, e.g. guidance on national accounting concepts to assist with the correct approach in measuring the contribution of the communications sector to the overall economy.

Other specified needs that have been identified by the DCMNR and ComReg arise as a result of the reluctance of data providers in the sector to provide the level of detail required.

These needs generally cannot be met by other sources due to confidentiality concerns or the specialised nature of the data required.

The data needs for monitoring the Information Society are changing quickly due to the rapid technological change in the sector. The 2003 report *"Ireland's Broadband Future"*<sup>30</sup> from the Information Society Commission highlighted the lack of adequate measures for monitoring the Information Society. One of the key recommendations to Government was:

*"Data deficiency issues should be addressed as a matter of urgency, to enable effective monitoring of the information society. This requires the development of performance indicators and adequate measures of the impact and outcome programmes and initiatives."*

A preliminary set of indicators (business, consumer and structural) were identified - some of which could be usefully compared with competitor economies while others would require time-series data. The indicators were chosen to inform policy-making and to monitor the effects of policy interventions in the economy.

The areas where data were considered deficient included: the potential uptake and usage of broadband by consumers; the likely price of access and the structure of service supply to consumers; likely investment response of the private sector to public service initiatives; rate of adoption by industry and producers; willingness of suppliers to pay access and price elasticities; impact of broadband on competitiveness and other economic measures. While the CSO and ComReg ICT enterprise and household surveys have addressed much of these needs through the inclusion of additional characteristics in their survey questionnaires, deficiencies still exist particularly in the area of assessing the impact of broadband on economic measures. CSO, under the terms of the *Statistics Act 1993*, has recently provided a researcher with access to a number of micro-data files (structural business statistics surveys and enterprise ICT survey) to enable research on a link between competitiveness and the level of ICT usage of enterprises.

A report on eInclusion<sup>31</sup> to the Information Society Commission in 2003 highlighted the requirement for benchmarks to be established and clear indicators to be developed to ensure that progress on inclusive Information Society development is measurable and the impact of investment and actions evaluated. It called for the use of indicators to develop public policy on an inclusive Information Society, data collection efforts to be co-ordinated and regular surveys on Internet use to be carried out by the CSO.

It is clear from these reports and the recently published report by the ESRI<sup>32</sup>, on behalf of the Information Society Commission, that there is a need to develop composite indicators on e-engagement by enterprises and e-inclusion for individuals/households which would encompass a range of different input variables. Much of the data required for the development of such indicators are available from existing CSO and ComReg survey data.

The EU's *eEurope 2005 Action Plan*, which sets up a number of targets to be achieved by the end of 2005 within the overall objective of the Lisbon Council for 2010 of *"making Europe within ten years the most competitive and dynamic knowledge-based economy in the world"*, includes among its actions a process of benchmarking by means of indicators. The CSO household and enterprise surveys on ICT will be conducted annually under EU regulation<sup>33</sup>.

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<sup>30</sup> Ireland's Broadband Future - Information Society Commission, December 2003.

<sup>31</sup> eInclusion: expanding the information society in Ireland - Report to the Information Society Commission, September 2003.

<sup>32</sup> Survey Assessments of the Information Society in Ireland - ESRI, December 2004.

<sup>33</sup> Regulation (EC) No 808/2004 of the European Parliament and of the Council of 21 April 2004 concerning Community Statistics on the Information Society.

These two surveys will be the source of harmonised statistics at EU level for most of the statistical indicators concerning Ireland needed under the *eEurope 2005 Action Plan*.

To enable effective monitoring of the Information Society, performance indicators and adequate measures to assess the impact and outcome of ICT-related programmes and initiatives must be in place. While the core indicators for EU benchmarking are in place, national requirements that build on these core indicators need to be agreed. In Ireland, there is a wide range of Government Departments and agencies involved in the development of the Information Society with different priorities and requirements for statistics. In order to ensure that the most relevant statistical information required to monitor Ireland's progress is identified and developed, we recommend that an ICT Statistics Liaison Group be established. The CSO operates similar liaison groups across topics such as macro-economic statistics, labour market, earnings, business and agricultural statistics. This group would replace a number of the bilateral meetings that the CSO conducts and would provide opportunities for relevant parties to have input into CSO ICT-related surveys. Given the dynamic nature of the ICT sector, such a group would provide a forum for identifying the changing requirements for the effective monitoring of the sector. It could also serve as a useful information-sharing mechanism between all parties.

It should be noted that we considered the issue of postcodes to be outside of the scope of this project. In January 2005, ComReg published a document<sup>34</sup> outlining the main points in the debate to date and recommended that a working group be established to develop a business case and implementation plan for the introduction of a public postcode. The DCMNR has since established such a working group. The introduction of postcodes would be welcomed by the CSO as it would be of significant benefit to the overall statistical system.

## 4.3 Energy

### 4.3.1 Introduction

The Department's core policy goals are:

- ◆ The development of competitive, efficient and properly regulated energy markets, which provide customers with a choice of energy services and support sustainable economic growth;
- ◆ The protection of security of energy supply;
- ◆ Ensuring that energy supply and use are environmentally sustainable.

One of the EU Commission's objectives is to secure full liberalisation of gas and electricity markets by 2005. The Commission for Energy Regulation (CER) is the independent body responsible for regulating and overseeing the liberalisation of Ireland's energy sector. The CER was initially established and granted regulatory powers over the electricity market under the *Electricity Regulation Act 1999*. The enactment of the *Gas (Interim) (Regulation) Act, 2002* expanded the CER's jurisdiction to include regulation of the natural gas market.

The Kyoto Protocol<sup>35</sup>, arising out of the United Nations Framework Convention on Climate Change, sets greenhouse gas emission (GHG) limits for the developed world. In 2002, Ireland, along with the other EU Member States, ratified the Kyoto Protocol. The EU has committed to reduce its annual GHG emissions to 8% below 1990 levels by 2008-2012 and

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<sup>34</sup> Report on Postcodes (Document No 05/07) - Commission for Communications Regulation, 26 January 2005.

<sup>35</sup> Kyoto Protocol to the United Nations Framework Convention on Climate Change, December 1997.

Ireland is required to limit its growth in annual emissions to no more than 13% above 1990 levels by the same period. The share of GHG emissions arising from energy-related activities was 66% in 2003 compared to 58% in 1990. The Government's *National Climate Change Strategy*<sup>36</sup> has set a target of reducing GHG emissions relative to a "business as usual" rate of emissions by 2010 to ensure that the Kyoto target for Ireland is met.

The *Green Paper on Sustainable Energy*<sup>37</sup> sets out how Ireland will progress to meeting its energy requirements in an environmentally and economically sustainable way. The Department works closely with the Department of the Environment and Local Government in progressing the sustainable development agenda.

Sustainable Energy Ireland (SEI) is Ireland's national energy authority. It was established in May 2002 under the *Sustainable Energy Act 2002* and its mission is to promote and assist the development of sustainable energy. This encompasses environmentally and economically sustainable production, supply and use of energy, in support of Government policy, across all sectors of the economy. SEI is charged with implementing significant aspects of the *Green Paper on Sustainable Energy* and the *National Climate Change Strategy* as provided for in the *National Development Plan*.

The Energy Policy Statistical Support Unit is SEI's specialist statistics unit. Its core functions are to:

- ◆ collect, process and publish energy statistics to support policy analysis and development in line with national needs and international obligations;
- ◆ conduct statistical and economic analyses of energy services sectors and sustainable energy options;
- ◆ contribute to the development and promulgation of appropriate sustainability indicators.

The CSO and SEI established the *Energy Statistics Co-ordinating Group* in 2002. The role of the group is to establish mechanisms for co-operation between SEI and the CSO and to oversee the implementation of these mechanisms and review as necessary from time to time. The aforementioned mechanisms comprise:

- ◆ SEI to propose additional questions for inclusion on existing survey(s);
- ◆ CSO and SEI to jointly assess new information requirements and make detailed recommendations;
- ◆ The organisation of new surveys, subject to availability of resources and other requirements;
- ◆ Individual SEI staff or researchers to be appointed as Officer(s) of Statistics under the *Statistics Act 1993* for the purpose of data analysis.

This group meets at least twice a year and is answerable to the Director General of the CSO.

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<sup>36</sup> National Climate Change Strategy Ireland, October 2000.

<sup>37</sup> Green Paper on Sustainable Energy - Department of Public Enterprise, 1999.

ESB Networks is the owner and operator of the electricity network in the Republic of Ireland. As the licensed Distribution System Operator it is responsible for maintaining all the sub-transmission, medium and low voltage electricity network infrastructure in the country. ESB Networks is responsible for making all new connections onto the electricity network. It is a separate business unit within the ESB Group. ESB National Grid is the licensed Transmission System Operator with responsibility for the operation, maintenance and development of the national grid. This role is expected to be taken over shortly by EirGrid Plc.

Agencies that we considered in scope for this project are Sustainable Energy Ireland and the Commission for Energy Regulation. While commercial companies are outside the scope of the project, some aspects of ESB Networks were examined. The bodies considered outside of scope include Bord Gais Eireann, Bord na Mona plc, ESB National Grid and the National Oil Reserves Agency.

### 4.3.2 Data holdings

Within the Department, the only division that indicated statistical data holdings was the Oil and Coal division - all other departmental data holdings of relevance have been handed over to SEI.

The Oil and Coal division stores information on oil imports, exports, consumption and opening and closing stocks. The data holdings are all at national level only, i.e. no enterprise level data are available. Until recently the division also held information on coal and peat consumption – SEI have now taken over responsibility for these data and for making the relevant returns to the EU.

SEI carries out a number of surveys to compile the National Energy Balance and to supply data to both Eurostat and the International Energy Agency (IEA). It also publishes much of the data in its own *Energy in Ireland* reports. Most of the surveys are very small with less than a dozen or so survey units covered. Some of these are new surveys that started in the last couple of years. In previous years, surveys were carried out by DCMNR. The relevant data holdings were handed over to SEI along with responsibility for the surveys.

Detailed information was obtained on nine SEI data holdings that were considered most relevant to the project:

#### ◆ **Electricity Sales Survey**

The Electricity Sales Survey is a survey of electricity sales by broad sector for a given year. It is used for the National Energy Balance and IEA/Eurostat Annual Electricity/Heat Questionnaire and also for the *Energy in Ireland* reports. Data are stored at company level and are collected annually from electricity suppliers. The data have been collected by SEI since 2003.

#### ◆ **Electricity Generators Survey**

The Electricity Generators Survey is a survey of electricity production for a given year. The type of data collected includes fuel input, electricity produced and electricity consumed for a given year. Transmission losses are not captured however. Data are collected annually from electricity generators at enterprise level and have been collected by SEI since 2003. The data are used to help compile the National Energy Balance and feed into the *Energy in Ireland* reports. They are also used for the IEA/Eurostat Annual Electricity and Heat Questionnaire to give values for fuel input to electricity generation.

#### ◆ **Energy Prices and Taxes Survey**

The Energy Prices and Taxes Survey is a survey collecting price data specifically for the IEA Energy Prices and Taxes Questionnaire. Actual prices and taxes plus price indices are collected. The data sources are the Oil Division in DCMNR, electricity and gas suppliers and the CSO *Wholesale Price Index* and *Consumer Price Index*. The data have been collected by SEI since 2002 and were collected by DCMNR before this. Eurostat conducts a separate price survey under the EU Price Directive (Council Directive 90/377/EEC) with the objective of improving the transparency of gas and electricity prices charged to industrial end-users. The survey is undergoing change at the moment to include all operators in the liberalised market and a parallel test exercise will be done this year by SEI.

#### ◆ **Fuel Cost Comparison Survey**

The Fuel Cost Comparison Survey collects scheduled fuel price data for industrial/commercial and domestic fuels (scheduled fuel prices are un-discounted published tariffs). The data are collected from electricity and gas providers, oil and LPG companies, oil and solid fuel trade associations and Bord na Mona. The data have been collected since 1981 and are currently collected on a quarterly basis though the frequency of collection has varied in the past. The data are used to compile the Fuel Cost Comparison sheets as published by SEI. They are also held on an archive file so a history of price data is available back to 1981.

#### ◆ **Other Energy Balance Data**

The Other Energy Balance Data include a variety of information used to populate the National Energy Balance. They are also used in the *Energy in Ireland* reports and for the IEA/Eurostat Annual Questionnaires. The main types of data collected are annual statistics on gas imports and consumption, oil balances, peat production and consumption and a breakdown of electricity generation. The information is stored at company level and is collected from Bord Gais Eireann, the Oil Division in DCMNR, Bord Na Mona and ESB National Grid. The data have been collected by SEI since 2002 but were collected by DCMNR before this.

#### ◆ **Renewables Survey**

The Renewables Survey is a survey of renewables/biomass data collected for the Energy Balance and IEA/Eurostat Annual Renewables Questionnaires. They also feed into the *Energy in Ireland* reports. The main types of data collected are energy generated, electricity produced, calorific values, volumes and boiler capacity. The data are stored at company level and are collected from sawmills, boardmills, rendering plants, waste water treatment plants, landfill gas sites and all farm and industrial anaerobic digestion sites. This data collection began in 2004 and the data will be collected annually.

Some of these data are also available from the EPA as they are collected on their IPPC licences. The format in which the data are stored in the EPA however means that it would be very labour intensive to extract the data required for this exercise.

#### ◆ **Solid Fuel Survey**

The Solid Fuel Survey is a survey of coal/peat production and consumption (by volume) for a specified year. It is used for the Energy Balance and IEA/Eurostat Annual Solid Fuel Questionnaires. It also feeds into the *Energy in Ireland* reports. The

main types of data collected are solid fuel imports, exports, sales and production. The data are stored at company level and are collected from all coal importers and peat producers. The data have been collected by SEI since 2002 and were collected by DCMNR prior to this.

#### ◆ **Combined Heat and Power Survey**

The Combined Heat and Power (CHP) Survey is conducted to inform the National Energy Balance and is also part of a Eurostat project. The data are held at CHP unit level and are collected from all CHP units in Ireland. The data collection has been carried out by SEI since 2001 and was carried out by the Irish Energy Centre and ESB prior to this. The type of data collected includes system details, fuel inputs and heat/electricity outputs. The status of the CHP unit is also captured, i.e. whether it is operational or not. Statistics produced from the survey include statistics on installed capacity and number of units by sector and sub-sector, fuel used, heat and electricity outputs and efficiency of units. Some missing values exist where the data are not available from respondents.

#### ◆ **Large Industry Energy Network (LIEN)**

The Large Industry Energy Network (LIEN) is a group of the large industrial companies operating in Ireland that have highest usage of energy and are participating in the LIEN. The data collected by SEI allows companies to benchmark their energy performance against previous years and shows trends in energy efficiency for the group. The data collected are highly confidential and are made available to SEI only on the condition that they will not be used for any other purpose or shared with any other body. The data are collected annually and have been collected every year since 1995. Data are collected on electricity use, CHP, fuel consumption and output of produce for the business. Information is also sought on energy performance targets and future projects that will impact on energy usage. Energy performance trends are produced by SEI for each company and also for the group as a whole. Some missing values exist within individual records.

The CER has only one main data holding. This is a database of gas and electricity licence holders. The data are taken from licence applications and are stored at company level. The type of data held for electricity licences include company name, contact details, plant details (for authorisations to construct/licences to generate) and date issued. Each company also has a reference number. The type of data held for gas licences include company name, contact details, location and date issued.

Within ESB Networks, the Meter Registration System Operator (MRSO) is a "ringfenced" function with responsibility for the "Change of Supplier" process, i.e. the transfer of responsibility for the consumption through a specific metering point from one supplier to another, and the processing/aggregation of meter data required for the competitive electricity market. A central meter registration system is essential in order to associate each metering point with a supplier. This ensures that each supplier can be billed for the energy consumed by their customers and to ensure that transmission and distribution use of system charges can be calculated for the metering points for which each supplier is responsible.

The central meter registration system was launched in January 2005. It includes a database of all electricity customers. Details such as name and address are stored. For commercial customers, i.e. those with a peak usage over a threshold of 30kVA, the NACE<sup>38</sup> economic activity code is stored. When the system went live in January of this year, the NACE code

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<sup>38</sup> NACE – Statistical classification of economic activities in the European Community.



was obtained by translating an activity code from the previous ESB billing system. Originally it was based on the old NACE 70 classification but was mapped (automatically) to NACE Rev. 1 (2-digit level). For any new customers or customers changing supplier, a 2-digit NACE Rev. 1 code is assigned – this is provided by the supplier at registration. There are currently approximately 14% of records without a NACE classification. No geographic classification is in use. The key identifier used in the retail electricity market is known as the Meter Point Reference Number (MPRN). The MPRN has no links to other more commonly used identifiers. Details of each electricity meter point are available to the suppliers via this system.

### **Statistical potential of data holdings**

Although most of the surveys carried out by SEI cover a very small number of businesses, the use of a unique identifier for each enterprise is recommended. This same identifier should be used for each enterprise across all surveys to allow comparisons between data from different surveys and different time periods. Unique common identifiers would also help to facilitate comparisons with survey data collected by the CSO and other bodies (where appropriate). The use of standardised classifications wherever possible is also important to enable comparisons of data at aggregate level.

It may be helpful to maintain a register of survey units particularly for the larger surveys, i.e. the Renewables Survey, the CHP Survey and the LIEN. Maintaining a current register of survey units would be of use in keeping contact details up to date and ensuring full coverage of targeted units.

The Environment Statistics section in the CSO uses the electricity sales, energy prices and the other energy balance data holdings in calculating the breakdown of greenhouse gas and acid rain precursor emissions. With regard to the Electricity Sales Survey, the CSO would like to see these data broken down into brown and green energy. As for the Energy Prices and Taxes Survey, data broken down by sector and/or size of purchase would be useful to the CSO but this type of information is not currently available. There is a new test methodology underway for the Price Directives to collect prices on a more detailed level. This exercise will begin in SEI in 2005. The requirements of the CSO are being progressed through the *Energy Statistics Co-ordinating Group*.

The data collected by SEI are provided on a voluntary basis for all of the surveys. There may be a need to consider a legislative basis for some of the surveys particularly where there may be reluctance from suppliers to provide sensitive (but essential) information.

A significant issue with the statistical potential of the central meter registration system is the quality of the economic activity codes on the system. The individual codes assigned need to be consistent with NACE coding in other statistical sources and in particular with the CSO Business Register as the information is linked to other sources at aggregate level. This raises a number of issues including the use of a unique business identifier and access to a central business register.

The identifier used on the meter registration system for the retail electricity market has no links to other more commonly used identifiers. In order to ensure consistent NACE coding for statistical purposes, the CSO can under the *Statistics Act 1993*, assign NACE codes and size class codes to the records of public authorities. However, in order to do this, a common identifier for each business must be in use. As this is not the case with the ESB system, automatic updates of the NACE codes from the CSO Business Register cannot be done. As a result, matching volume data at NACE 2-digit level from this system with CSO aggregate data (which could have different underlying codes) could cause serious quality concerns.

In order to facilitate matching of data files, e.g. matching ESB data with CSO data, a common identifier must be in use. The identifiers publicly available at present are problematic as they do not provide full coverage of the economy due to exemptions, limitations in scope etc. A unique identifier for all businesses would facilitate the linking of data at micro level (i.e. individual businesses) but also at a macro-level as common classifications could be assigned through the matching of records. It is not just the statistical system that would benefit from a single unique business identifier - there are also significant benefits for the administrative system and for e-government developments. These benefits would be similar to those experienced through the introduction of the PPS Number as a single unique identifier for individuals.

The CSO Business Register is a register of all businesses engaged in economic activity in the State. The *Statistics Act 1993* restricts the sharing of this information with any other body. As mentioned above, the Act allows the CSO, to assign NACE codes and size class information to the records of other public bodies for statistical purposes. In addition to the problem of lack of common identifiers, the ESB system would fall outside the scope of the Act as it and the electricity suppliers connected to the system are not public bodies. This then opens up a wider issue about the need for a more accessible business register.

There are many registers of businesses in use across Government departments and agencies but they are limited in scope and coverage to some extent (including the CSO Business Register). The Companies Registration Office (CRO) maintains a publicly available register but the scope and coverage are limited. Similarly, the Office of the Revenue Commissioners has various registers of the businesses with which they interact but these are not publicly available. Many other Departments and agencies maintain registers of businesses for certain sectors of the economy. There is much overlap in the information stored but because different identifiers are in use, the data are usually isolated and cannot be linked resulting in the same type of information being collected numerous times from businesses (though the Revenue Commissioners utilise some information from the CRO and likewise the CSO uses some Revenue data). This is not only an unacceptable burden on businesses but it is also an inefficient use of public resources.

A centrally maintained accessible business register that covers the entire economy containing key core information such as a unique identifier, activity code, size, name, address, geographic code, legal status, etc would provide significant benefits for the statistical and administrative systems. Such a register would allow Government Departments, their agencies, the CSO and other compilers of statistics to link data (subject to data protection constraints) and also facilitate the propagation of consistent classifications across the statistical and administrative systems. If necessary, Government bodies could maintain their own satellite registers for their own specific purposes which could feed off the central register. The population of this register could be done initially from existing sources and going forward through a central registration system for businesses who wish to interact with government, i.e. businesses send their key information (start-ups, change of address, cessations, change of activity, etc) to Government once only. This would reduce the burden on businesses and reduce some overlaps and inefficiencies in the public sector.

### **4.3.3 Data needs**

None of the Divisions within the Department indicated that they had any statistical data needs nor did the CER. SEI, through its Energy Policy Statistical Support Unit, identified numerous data needs – these are listed in full in Appendix 3.

SEI compiles energy consumption statistics that feed into the annual national energy balance sheet. Energy intensity and efficiency indicators are required nationally and by

Eurostat and other international bodies such as the IEA. These indicators are important for monitoring EU progress on policies and measures for the achievement of Kyoto targets.

SEI has identified many gaps in data availability. These are discussed below under broad sectoral headings – industry, commercial and public services/tertiary, transport, residential and agriculture. It is important to note that many of the issues identified below are actively under discussion through the *Energy Statistics Co-ordinating Group*.

All figures used below are from the SEI publication *Energy in Ireland 1990-2003*<sup>39</sup>.

## Industry

The industry sector in 2003 accounted for 19% of final energy consumption (decreasing from 24% in 1990). Electricity is the second most dominant energy form in industry at 29% behind oil at 34%. On a primary energy basis (i.e. including the fuels required to generate it) electricity accounts for 50% of energy used in industry. Industry accounts for 20% of energy-related CO<sub>2</sub> emissions in 2003 - electricity consumption is responsible for 52% of this. Energy consumption in Irish industry is concentrated in a relatively small number of large enterprises.

Statistics on this sector are relatively well developed but more detailed sub-sectoral (i.e. NACE 2-digit level) information is required. Energy expenditure by fuel type at sub-sectoral level is known from the CSO *Census of Industrial Production (CIP)*. Energy consumption by fuel in volume terms at sub-sectoral level is estimated but there are serious issues with the unit price data used to estimate the volumes – these issues are discussed further below. Energy intensity at sub-sectoral level is calculated using consumption/expenditure and gross value added from the CIP. Energy intensity at constant structure is required – this is discussed in more detail below.

Detailed fuel expenditure data are collected via the CIP once every three years. SEI would like more frequent data collection. This is under review through the *Energy Statistics Co-ordinating Group*.

Gross value added figures from the CIP are used in the calculation of energy intensity at sub-sectoral level. These gross value added figures are at current prices. SEI also requires gross value added figures at constant prices in order to calculate energy intensity in a constant structure. The monthly industrial production index monitors current trends in the volume of production and could be used to measure changes in value added at constant prices. Gross value added at constant factor cost by major sector is available from the annual *National Income and Expenditure* results but there are no sub-sectoral breakdowns. Changes to the methodology used to compile these results are planned and it is expected that sub-sectoral information for gross value added at constant factor will be more readily available.

The volume of each fuel used by sub-sector is not reliably available for all fuels. The volume can be estimated from the expenditure on each fuel along with the relevant unit price information which is also available. The problem with this, however, is that only scheduled unit price information at sectoral level is given to SEI by the suppliers. Thus for sub-sectors where there is significant discounting of fuels, the volume cannot be accurately estimated as the actual unit price is not available (discounting is a common occurrence in the industry sector particularly for electricity and gas).

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<sup>39</sup> *Energy in Ireland 1990-2003, Trends, Issues and Indicators* - Sustainable Energy Ireland, January 2005.

Volume and revenue information by sub-sector could be collected either directly from the consumers or from the suppliers. The latter approach would be preferable as it would not increase the burden on respondents. There are however obstacles to this happening and these are discussed further below. The alternative is to collect data directly from the consumers – the possibility of collecting volume information as well as expenditure through the CIP is under discussion at present through the *Energy Statistics Co-ordinating Group*.

As outlined under section 4.3.2, ESB Networks maintains a central meter registration system, i.e. customer information is stored centrally including economic activity codes (NACE). The meter registration system holds volume information but no revenue. Matching this volume information with CSO expenditure information at sub-sectoral level is possible but could be problematic due to likely differences in NACE coding. Customer details are distributed to the relevant suppliers. Each supplier therefore should have access to the NACE codes and could, as a result, provide volume and revenue information by NACE 2-digit level. Reluctance on the part of suppliers to provide such information is likely to be an issue but we did not investigate this as part of the project. The major concern here is the quality of the NACE codes on the central meter registration system. Unless a mechanism is developed to ensure the use consistent NACE classifications (as outlined in Section 4.3.2), then there will always be quality concerns about the resultant statistics.

We recommend that structures be put in place to ensure that volume and revenue data can be provided by the suppliers using NACE codes consistent with those used by the CSO - this includes the development a central register of all businesses with a unique business identifier and any supporting legislation necessary to ensure compliance by suppliers.

There is a similar issue with gas consumption but we considered Bord Gais Eireann outside the scope of the project. However, the issues that arise for the meter registration system for electricity are also likely to be relevant here, i.e. systems should be designed to have common identifiers, common classifications (NACE codes, etc).

### **Commercial and Public Services/Tertiary**

The commercial/public services sector accounts for 15% of final energy consumption (up slightly from 14% in 1990). Oil, gas and electricity make up the bulk of the energy consumed with 41%, 17% and 40% shares respectively. The sector is responsible for 19% of energy-related CO<sub>2</sub> emissions (up from 16% in 1990) with electricity accounting for 64% of these emissions.

In the services sector, expenditure by fuel type is available from the CSO *Annual Services Inquiry*. This information is collected once every five years (the EU Structural Business Statistics regulation does not require the collection of detailed fuel expenditure for this sector whereas data must be collected at least once every three years for the industry sector). SEI would like this information to be collected more frequently and, as a result, the CSO plans to collect the information annually from 2005 onwards.

Just as in the industrial sector, gross value added at constant prices is required to estimate energy intensity at constant structure. This is problematic for the services sector as appropriate short-term indicators are not available for all service activities. The CSO is currently developing producer price indices for the services sectors. This development is being done on a phased sector-by-sector basis with plans to have all sectors covered by early 2007. Once this series is available, the measurement of gross value added at constant prices will conform more closely with Eurostat requirements. As mentioned under the industry section, gross value added at constant prices is published as part of the annual

National Income and Expenditure results. Changes to the methodology are planned and it is expected that more detailed sub-sectoral information will be more readily available.

Other relevant measures of energy intensity in the services sector are energy consumption per unit of floor area (as heating is a significant use of fuel in this sector) and energy consumption per employee (as electricity for IT equipment etc is related to the number of employees). Energy intensity based on floor area is used by other EU Member States. Floor area for the stock of buildings in this sector by building type and age is required by SEI. While there may be a requirement under the forthcoming revision of the Structural Business Statistics regulation to collect sales space in the retail sector, this will not meet all the needs of SEI. SEI plans to examine all existing data sources and may, if necessary, consider commissioning a study in this area. The matter is also under discussion at the *Energy Statistics Co-ordinating Group*.

Volume data are also required in the services sector. However, the problems with estimating volume data are not as serious in this sector as in the industry sector because price discounting is not a major factor. This means that the difference between scheduled prices and actual prices are not as pronounced and therefore reasonable volume estimates can be made using scheduled prices. Nonetheless the solution proposed for the industry sector concerning direct data collection from energy suppliers is also applicable for the services sector. The CSO does not intend to collect volume data directly from businesses (via the *Annual Services Inquiry*).

A gap in the coverage in this sector relates to the public sector and the financial intermediation sector as the *Annual Services Inquiry* does not cover these sectors. The *Annual Services Inquiry* will cover some sub-sectors in the financial intermediation sector for the 2004 reference year and onwards. The forthcoming revised EU Structural Business Regulation may result in pilot studies in these areas and it is likely that in the longer term coverage of non-traded sectors will occur.

## **Transport**

The transport sector accounts for 39% of final energy consumption (increasing from 28% in 1990). It is now the dominant energy-consuming sector (on a final energy basis). Since 1990, the most significant area of growth in greenhouse gas emissions has been in energy-related emissions and in particular in the transport sector. Emissions in 2003 were 127% higher than those in 1990 for the transport sector and energy use by that sector now accounts for 25% of all energy-related emissions.

Fuel consumption in this sector is closely aligned to the mode of transport used. Road transport accounts for 81% of energy consumed in the sector. While it is difficult to accurately separate private transport from overall road transport due to gaps in the available data, SEI estimates that private cars account for almost 48% of road transport energy or 38% of all transport energy. Private cars thus account for approximately 15% of Ireland's final energy consumption.

Almost all transport energy in Ireland is oil-based. While overall consumption information is known, detailed breakdowns by mode are not available. There is some information available for public transport but there is a significant gap for private cars and commercial transport.

Particular needs highlighted include:

- ◆ Average fuel efficiency of the stock of vehicles by vehicle type and type of travel (urban/ex-urban);

- ◆ Average kilometres per year by vehicle type and type of travel (urban/ex-urban);
- ◆ Passenger kilometres by mode.

There is a requirement under Decision 280/2004/EU (concerning a mechanism for monitoring greenhouse gas emissions) to report annually the following indicators relating to transport:

- ◆ Passenger traffic in cars in million passenger kilometres;
- ◆ CO<sub>2</sub> emissions from passenger cars (the split between diesel and petrol for passenger cars needs to be known to do this);
- ◆ Average kilometres per diesel and petrol cars per year;
- ◆ CO<sub>2</sub> emissions per diesel and petrol cars;
- ◆ CO<sub>2</sub> emissions from diesel consumption in freight transport;
- ◆ Passenger traffic by air in million passenger kilometres;
- ◆ CO<sub>2</sub> emissions from air transport.

These EU requirements align well with national data requirements for the purposes of policy formulation and impact assessment.

The Irish Maritime Development Office (IMDO) has highlighted a forthcoming EU requirement to monitor emissions of vessels arriving at and departing from Irish ports – see section 4.4.3 for further details.

There is some scope for utilising existing sources such as the Motor Tax data and National Car Test (NCT) data. The value of these data sources could be increased through some enhancements as recommended in Chapter 8 (Department of Transport). A specific recommendation made in this chapter which could be beneficial is:

- ◆ *Add additional variable for the Motor Tax file, i.e. impose a requirement for the annual collection of vehicle odometer readings which would provide population vehicle kilometre data classified by vehicle type, age, etc. Alternatively, use NCT data (but there is an issue about lack of distinction between kilometres and miles which would have to be resolved.)*

Chapter 8 recommends that a National Transport or Mobility Survey be established which would provide a comprehensive and wide-ranging set of statistics across all transport modes. This was in response to serious data gaps highlighted by the Department of Transport which hinder the formulation of transport policy. From an energy perspective, such a survey could possibly provide:

- ◆ Fuel consumption by mode – this is important so that emissions can be assigned to the activity causing them;
- ◆ Passenger kilometres travelled – this could be linked to fuel consumption to calculate energy and emissions per passenger;
- ◆ On-road fuel efficiency of cars by type of travel.

Comprehensive data on transport would make possible the decomposition of changes in energy use into those caused by modal shifts, change in fleet structure, fuel switching, volume of travel, etc.

We support the recommendation that a National Transport Survey be established. We recommend that SEI be a stakeholder in the design of such a survey so that the needs of those involved in energy policy can be addressed.

We also support the recommendation that consideration should be given to establishing a Transport Statistics Liaison Group. We recommend that SEI be represented on such a group as comprehensive transport statistics are vital for the development and monitoring of energy policies.

## **Residential**

The residential sector accounts for 24% of final energy consumption (a decrease from 30% in 1990). It is the second most dominant energy-consuming sector (after transport). Oil is the dominant fuel in this sector with 37% share followed by electricity (22% share) and gas (20% share). The sector accounts for 25% of all energy-related CO<sub>2</sub> emissions.

The data needs identified by SEI in this sector include:

- ◆ End use energy consumption by fuel;
- ◆ Specific consumption of appliances;
- ◆ Floor area of existing stock of houses by house type (and age).

SEI has provided a comprehensive list of requirements to CSO through the *Energy Statistics Co-ordinating Group* – these are listed in Appendix 3. Some of the requirements have been incorporated into the special modules for the CSO *Quarterly National Household Survey* such as the “Travel to Work” module for the third quarter of 2004 and the “Recycling and Energy Conservation” module scheduled for the third quarter of 2005.

## **Agriculture**

The agriculture sector accounts for almost 3% of final energy consumption. The sector accounts for 3% of all energy-related CO<sub>2</sub> emissions.

SEI identified energy consumption by fuel and end use to be a requirement. This issue is being progressed through the *Energy Statistics Co-ordinating Group*.

## **4.4 Marine**

### **4.4.1 Introduction**

The DCMNR has a wide range of roles and functions in the marine area including maritime safety, marine environment, maritime transport, marine tourism and leisure, marine research, coastal zone management and the seafood sector. Agencies operating under the aegis of the DCMNR in this area include Bord Iascaigh Mhara, the Marine Institute, the Irish Maritime Development Office, Port Companies, Harbour Authorities and the Commissioners of Irish Lights.

The Department has numerous data holdings and some statistical needs but many of these were considered outside the scope of this project. Examples of such holdings include data on vessels calling to Irish ports, vessel safety data and marine engineering statistics. Needs such as the harmonisation of maritime incident data (accidents/pollution) were highlighted during initial meetings with DCMNR.

The areas considered in scope for the project were maritime transport and the seafood sector including the Irish Maritime Development Office (IMDO) and Bord Iascaigh Mhara (BIM).

The IMDO is the dedicated State development agency for the Irish shipping and shipping services sector. A key role of the office is to provide assistance to the Irish maritime industry and its consumers in its effort to maintain competitiveness in the international market place.

BIM is the State agency with responsibility for developing the seafishing and aquaculture industry. A primary objective is to expand the volume, quality and value of output from the seafood and aquaculture sector within the context of EU policy and the *National Development Plan 2000-2006*.

#### 4.4.2 Data holdings

The Department is building a new Integrated Fisheries Information System (IFIS) which is expected to be operational in the second quarter of 2005 (as part of its Integrated Corporate Data Model). Deficiencies in the existing systems that support the key business processes of vessel licensing, vessel registration and sea fisheries management and control were recognised by DCMNR. The purpose of IFIS is to replace these systems with a single system, a centrally stored database, which will integrate these related business processes, facilitate access to information for reporting purposes, enhance the ability of the Department to provide data to and access data from external agencies, and to maximise the potential for citizen access in line with the Government's Action Plan for the Information Society in Ireland. The IFIS system will facilitate: issuing licences for sea fishing vessels, registration of sea fishing vessels; capacity management of the Irish fishing fleet; monitoring the operational activities of sea fishing vessels via a link to the Naval Service Lirguard System (the integrated system for fisheries surveillance and control); recording the declared landings of sea fishing vessels and shellfish gatherers as reported on EU log sheets; compilation of statistics on fishing effort and catch for policy development and EU regulatory compliance; transmission of reports on Vessel Registration and Fish Catch to the EU FIDES System.

BIM identified their Marketing, Fishing Fleet, and Aquaculture databases as relevant data holdings for the purposes of this project.

- ◆ *Economic survey of the Irish Fishing Fleet*

This annual survey commenced in 2004 in response to an EU Directive from the Fisheries Directorate. The data collected include the PPSN of the registered boat owner, running costs of the vessel (e.g. fuel, food, ice, bait, loan repayments), costs of repairs and maintenance (hull, gears, safety equipment etc), dues and levies, crew costs and employment details. Vessels are identified by their official number in the Irish Sea Fishing register (this is maintained by the Department and will be part of IFIS). Experience from a pilot survey conducted in 2003 suggests that response rates could be a serious problem. There is no statutory instrument in place to compel compliance.



◆ *Marketing database*

The Marketing database, which has existed from early 2003, contains market information on the seafood sector. Records are held at the processor level and these enterprises remotely update their own information such as contact details and product prices on the database.

◆ *Aquaculture database*

The Aquaculture database holds survey information on production and employment in the sector. No further details have been provided.

The IMDO have a number of individual data holdings on maritime transport covering register details, value data, employment, transport costs, traffic levels, and price comparisons – see Appendix 4 for further details.

### Statistical potential of data holdings

The development of IFIS should provide potential for more analyses of the seafood sector to be conducted. As detailed information on the system has not been made available, it is difficult to assess this potential. Assuming that good practices are adopted such as the use of commonly used unique identifiers on records relating to individuals and businesses (or boats) and the use of standard classifications, it should be possible to link data from the IFIS system to other data sources. For example, it should be possible to link the IFIS system to the Fishing Fleet survey conducted by BIM for additional analyses for fishery and environmental statistics. In order to ensure that the potential for data linkages is exploited, close links between the stakeholders should be maintained.

Data from IFIS could be useful in providing information on fishing boat operators for the CSO Business Register as the CSO is likely to require coverage of this sector from 2007 onwards (as a result of proposed revisions to the EU Business Register regulation).

#### 4.4.3 Data needs

In the seafood sector, existing data needs are met through current data collections by the Department and BIM and from CSO trade statistics. No significant additional statistical needs were identified.

There are a number of data needs in the maritime transport sector which have been articulated by the IMDO. The IMDO uses many CSO data particularly trade statistics, port traffic statistics and road freight statistics. It began issuing a new publication in 2004 called the “*Irish Maritime Transport Economist*”. The report contains a range of statistical data on the impact and outlook of the Irish maritime trade-related performance.

The IMDO indicated a requirement for a more detailed breakdown of the CSO *Statistics of Port Traffic*. The required information is collected by the CSO but is not published because of confidentiality considerations. Possible solutions to this issue include providing access to the micro-data through the Officer of Statistics mechanism (if circumstances are appropriate as defined under the *Statistics Act 1993*) or contacting the data providers directly to seek permission to provide the required information to the IMDO.

A particular high priority need that is currently not met is the requirement to identify actual routes which freight shipments take. This requirement was highlighted in a recent report by

Logistecon Economic and Management Consultants<sup>40</sup> which was compiled on behalf of the IMDO. The study examined the potential for new sea routes and the possibility of increased road user charges across the EU. The work identified important deficiencies in the information that is available that inhibit adequate forward planning and it recommended that the CSO discuss with relevant stakeholders their statistical requirements to identify the best approach for the collection of such statistics. The IMDO has requested that the possibility of enhancing the current CSO *Road Freight Survey* be considered or, failing that, that the CSO provide advice in the development of a new IMDO survey in this area.

The lack of detailed information on transport statistics is apparent from Chapter 8 (Department of Transport) and an issue that is of relevance here is that the chapter highlighted the need for more detailed road freight data. It is clear from Chapter 8 that the whole area of transport statistics needs to be reviewed. We recommend that with the development of an integrated transport statistics framework that the CSO, in reviewing this whole area, consult with the IMDO to discuss the most appropriate solution to their statistical data needs.

One of the recommendations made in Chapter 8 (Department of Transport) was that consideration should be given to establishing a Transport Statistics Liaison Group in order to improve links between the CSO and the Department of Transport. We recommend that the IMDO be represented on such a group as maritime transport is an important link in an integrated transport chain.

Another requirement of the IMDO is a breakdown of the trade statistics by transport mode and node (port/airport), i.e. external trade that is handled at Irish ports and Irish airports (in both value and volume terms). The mode of transport is available on request for CSO *Trade Statistics* as traders complete the information for goods above a certain threshold value. The CSO *Statistics on Port Traffic* provide details of tonnage by node. The CSO plans to develop air traffic statistics and has already begun data collection in this area. These statistics combined with the data on port traffic should be of use in assessing the breakdown of trade by mode and node.

The EU has finalised legislation to cut sulphur dioxide (SO<sub>2</sub>) and particle emissions from seagoing ships. SO<sub>2</sub> is an air pollutant which acidifies lake and forest ecosystems and harms human health. Particles can cause serious breathing problems and premature death. Ships have become the single biggest source of SO<sub>2</sub> in the EU because the maritime sector has lagged behind land-based industry in environmental improvement. Air pollutant emissions from ships are also covered by Annex VI of the Marine Pollution Convention, MARPOL 73/78, of the International Maritime Organization. Emissions from vessels arriving at and departing from Irish ports will need to be monitored.

The IMDO has indicated a need for guidance from the CSO on the range and use of its statistics. This is an issue that also arose with ComReg and highlights the need for CSO to be more proactive in this area.

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<sup>40</sup> *Irish Short Sea Shipping Inter-European Trade Corridors* - Logistecon Economic and Management Consultants (in conjunction with the Centre for Maritime Economics and Logistics at Erasmus University in Rotterdam and Ecorys Research and Consulting in the Netherlands), July 2004.

## 4.5 Natural Resources

### 4.5.1 Introduction

The areas that fall under the Natural Resources heading include inland fisheries, minerals exploration and mining, petroleum exploration development and production and the Geological Survey of Ireland (GSI). After initial discussions with each area, we decided that the main area in scope was minerals exploration and mining along with an aspect of the GSI.

The Exploration and Mining Division of the Department is responsible for the promotion, regulation and policy development of minerals exploration and extraction. Its core policy goal is *“to stimulate discovery of economic mineral deposits and to maximise the contribution of the mining sector to the national economy, with due regard to its environmental and social impact”*.

The GSI is responsible for providing geological advice and information and maintains a range of products including maps, reports and databases.

### 4.5.2 Data holdings

In the Exploration and Mining Division, the data holdings described below were considered to be of relevance to the project:

#### ◆ **Form 6 Returns**

The Form 6 Returns are statutory returns of activities under State Mining Leases and Licences ("SML"). A register of SML holders is maintained within the Department. Returns are mandatory for all current SML holders and are collected every six months, the date being tied to the date of issue of the SML. The data collection has been in existence since 1941 and a near 100% response rate is obtained (though difficulties are experienced with some small operations). The data collected include a description of work carried out, production, expenditure and reserves. Each unit is identifiable by a unique SML number.

The data holding is currently considered to be of low importance to the division but would be of high importance if the reporting requirements were revised to provide more useful data. The Exploration and Mining Division is currently reviewing proposals to collect data on production, including mine plans, reserves, revenues and costs, on a regular and comparable basis that can be compiled both at enterprise and industry level. The data could then be used to monitor lessee and licensee performance and as a significant input into policy formulation.

#### ◆ **International Lead and Zinc Study Group (ILZSG) Statistics**

The main type of information collected is production and shipment data of lead and zinc from mines and smelters. These data are collected from all producers of lead and zinc. A register of these companies is kept by the Exploration and Mining Division and new records are added to it whenever a new mine opens. A 100% response rate is obtained. Data are collected both monthly and bi-annually and have been collected since 1959. The data are considered to be of high importance as they are published in the ILZSG bulletin.

#### ◆ **Annual Exploration and Mining Expenditure**

The data are collected from holders of prospecting licences and State Mining Facilities for the purpose of informing the Department of expenditure on mineral exploration and development in each calendar year. The Exploration and Mining Division maintains a register of these companies. Data are collected annually on drilling and exploration work and all other fieldwork, excluding Irish office overheads, involved in the search for minerals. Also included are accommodation, travel and salaries during field work, cartography, report writing, consultancies and data acquisition. The data are considered to be of high importance as they are published in a quarterly report and assist in monitoring compliance with expenditure requirements under prospecting licences.

The GSI has only one data holding of relevance to the project:

◆ ***The Quarry Directory***

The main type of information held on the database is the quarry address and grid reference, the name and address of the quarry operator and information on rock type, production and products. Information on the status of operations (active/inactive/sporadically active) is also collected. The data are computerised but missing values exist within records on the database where no information could be obtained in answer to a part of the questionnaire. No form of imputation or estimation is used to fill these blanks.

To date the data collections have been at irregular intervals. Collections took place in 1986, 1994 and in 2001. The first two data collections were carried out using a postal questionnaire while the 2001 collection was done using field officers who visited each quarry. Data are collected from all quarries, pits and mines that are known to GSI at the time of the data collection. The data are published in the “Directory of Active Quarries, Pits and Mines in Ireland”. Each quarry is identifiable on the database and in the printed directory by a unique identifier called a quarry number (which is assigned by GSI).

### **Statistical potential of data holdings**

The data held by the Exploration and Mining Division are mainly of a specialised nature and thus have limited potential for further use outside of the Department.

Users of the Quarry Directory include planners, economists, engineers, geologists and consumers and producers of natural stone. It is considered a useful reference for those seeking information on quarries and pits. However, the different methodologies used and the irregular intervals between collections make comparisons over time of the aggregated data difficult.

The unique identifier used for each record on the database is an internal GSI number with no links to any other commonly used business identifiers. This makes comparisons at record level to other data sources extremely difficult, e.g. links with CSO data sources.

### **4.5.3 Data needs**

Physical production data at enterprise, national and international level are currently in use but reliable data on non-metallic minerals production, including the number of producers by size distribution, are needed. The Exploration and Mining Division uses CSO *PRODCOM Product Sales* statistics for both metallic and non-metallic minerals production but has

reservations about the completeness of the data and the timeliness of its publication. The CSO are currently assessing this situation but the lack of a common identifier on the Quarries Directory hampers progress.

Information on the amount of land permitted for extractive industry development is required. The EU is increasingly seeking this information for its development of policy on sustainable development. It is lacking in most EU countries and poor information is likely to result in ill-informed policy decisions. The DCMNR can provide information for the mining and exploration sector but the quarrying sector is not part of its remit.

The Department also requires sectoral information, i.e. details on the metallic and non-metallic minerals sectors. The type of information required is value added, employment, profitability and major cost items, especially labour and power. These variables are also needed for the main individual operations under the Minerals Development Acts. These are fundamental indicators of competitiveness and economic sustainability of the mining sector and are essential for well-informed decisions on policy areas such as justification for support for the industry, nature and level of royalties. The data could be collected by the Department for State Mining Facilities.

The Department would like to get more dis-aggregated data from the CSO *Census of Industrial Production* on the non-metallic sector. The CSO data are aggregated by economic activity classification to quite a broad level for confidentiality reasons. The CSO should assess the feasibility of appointing an Officer of Statistics from the Mining and Exploration Division to provide access the relevant data subject (subject to suitability under the terms of the *Statistics Act 1993*).

## **4.6 Summary of recommendations**

### **4.6.1. Establish a unique common identifier for businesses**

Many of the data holdings that we examined have either no unique identifier or have an identifier that is specific only to that particular data holding. Without common identifiers, data at micro-level (i.e. individual business level) cannot be linked resulting in isolated islands of data and an under-utilisation of the potential of the data. A unique identifier that is used by businesses for all dealings with Government and that is stored on all records relating to the businesses by Government Departments and agencies would enable linking of data across sources and facilitate a reduction in duplication of data collected by Government from businesses.

### **4.6.2. Use standard classifications**

Standard classifications should be used whenever possible in order to enhance the comparability of data at macro (aggregate) level. Common classifications are essential in order to match data at macro level to facilitate cross-sectional analysis by both those in the public sector and external users. However, the use of the same classification is not in itself enough to ensure comparability of data – businesses must be consistently classified to the same categories within classifications across the statistical system.

#### **4.6.3. Develop an accessible central business register**

A business register that covers the entire economy which is accessible across the public sector should be developed. This register should contain key information for businesses and be kept up-to-date through a single registration system. Such a register would facilitate the development of a single identifier for businesses and the use of standard consistent classifications across sources.

#### **4.6.4. Establish a National Transport Survey**

This is a key recommendation of Chapter 8 (Department of Transport) as major data gaps were identified by the Department of Transport and its agencies in the area of transport statistics. We support this recommendation as serious data gaps in transport statistics were also identified by both SEI and the IMDO relating, primarily to private car usage and freight transport (respectively). Both the SEI and the IMDO should be included as stakeholders if an integrated transport statistics framework is to be developed.

#### **4.6.5. Establish a Transport Statistics Liaison Group**

This is another recommendation made in Chapter 8 (Department of Transport) which we support. It is clear from discussions with SEI and the IMDO that there are significant demands for transport statistics for maritime transport policy-making and particularly for energy policy purposes which are not being met. As this is an inter-departmental issue, such a forum would provide opportunities to discuss and agree on the priority data needs for the sector. SEI and the IMDO should be included on such a group.

#### **4.6.6. Establish an ICT Statistics Liaison Group**

Consideration should be given to establishing an ICT Statistics Liaison Group in order to ensure that the most relevant statistical information required to monitor progress is identified and developed. Given the dynamic nature of the ICT sector, such a group would provide a forum for identifying the changing requirements necessary for the effective monitoring of the sector. The Department and ComReg should be represented on such a group.

#### **4.6.7. CSO consider appointing Officers of Statistics**

The CSO should consider providing access to its micro-data through the Officer of Statistics mechanism to the Exploration and Mining Division of DCMNR (for CIP data) and the IMDO (for Port Traffic Statistics). The appropriateness of providing access and compliance with the terms of the *Statistics Act 1993* would need to be assessed.

#### **4.6.8. CSO be more proactive in providing statistical advice to other Government bodies**

A lack of understanding of the full range and use of CSO statistics was a reasonably common finding during this project. The CSO publishes a vast amount of statistics but it is often possible to obtain even more detailed analyses of the data - users are

not always aware of this and tend to confine themselves to using published data only. A more detailed understanding of how to interpret the statistics could also be beneficial for users. The CSO should consider becoming more active in raising awareness of its statistics, e.g. by providing seminars on a range of topics. This has been done in the past for certain topics but there is scope for expanding this area.

Many Government Departments and agencies conduct statistical surveys. Advice from the CSO on statistical methodologies and related matters could be beneficial. Under Section 31 of the *Statistics Act 1993* if any public authority proposes to carry out a statistical survey it should consult with the Director General of the CSO and accept any recommendations that he may reasonably make in relation to the proposal. Greater awareness among public authorities of this requirement should be promoted.

#### **4.6.9. Retain ownership of micro-data and intellectual property rights**

When commissioning studies that involve the collection and analysis of statistical data, the commissioning body should ensure that it owns the raw data and the associated intellectual property rights. As the commissioning body funds the collection and analysis of the data from public funds, such data should be owned and stored within the public sector domain. This would facilitate further analyses and use of the data thus potentially enhancing its value and the value of other data holdings.

#### **4.6.10. Legislate for compliance**

Difficulties in obtaining data were a common issue raised by both the Department and agencies. Consideration should be given to introducing a statutory requirement for the collection of vital data. However, the Department and agencies should ensure that they have appropriate mechanisms and procedures in place for the management of sensitive information.