

# Ireland Business Forecast Report Q3 2014

<https://marketpublishers.com/r/I484E52887CEN.html>

Date: April 2014

Pages: 26

Price: US\$ 1,195.00 (Single User License)

ID: I484E52887CEN

## Abstracts

### Core Views

We hold an increasingly positive view of Ireland's prospects of an economic recovery over the next few years.

We forecast above-consensus real GDP growth of 2.3% in 2014, underpinned by our view that consumer spending will begin playing a bigger role in the recovery.

Ireland will maintain its competitive advantage in the service export sector.

However, the country's favourable corporate tax regime is likely to come under increasing international pressure in 2014, damaging the country's reputation within the EU and placing government under increasing scrutiny.

### Major Forecast Changes

We have revised-up our forecasts for real GDP to expand by 2.3% in 2014, from a forecast of 2.1% previously, against the backdrop of our increasingly bright outlook for consumer spending.

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Ireland's favourable corporate tax regime is likely to come under increasing international pressure in 2014, damaging the country's reputation within the EU and placing government under more scrutiny. The recovery of the housing sector is also likely to play a prominent role in Irish politics over the coming quarters, although we believe risks stemming from the sector will remain contained for the time being.

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Although political risk in Ireland is generally quite low, the country's economic downturn has put several structural issues into the spotlight. Challenges over the next decade will include demographic changes, regaining living standards, migration and the country's relationship with Northern Ireland.

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Ireland's economy will move onto an increasingly solid footing in 2014. We forecast above-consensus real GDP growth of 2.3%, underpinned by our view that consumer spending will begin playing a bigger role in the recovery.

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