CROSS BORDER PARTNERSHIP FOR EMPLOYMENT SERVICES (CBPES)

Labour Market Mobility in the Border Region of Ireland: Annual Report 2022



CROSS BORDER PARTNERSHIP Employment Services

Contents

List of Maps, Charts and Tables 4
Maps 4
Charts 4
Tables 5
Executive Summary 6
Introduction 8
Counting cross-border workers: the statistical challenge 12
The Context for cross-border mobility on the island of Ireland 16
The Cross Border Partnership for Employment Services 18
Information Sources 20
The Statistics 21
Key Statistics for Northern Ireland and the Republic of Ireland 21
The profile of the Northern Ireland-Ireland Border Region 26
Cross-border mobility in the Northern Ireland-Ireland border region 50
The Results 56
Survey of cross-border employers and results 59
Profile of respondents 59
Staff Recruitment 60
Cross Border Workers and Recruitment 61
Impact of Covid-19 and UK exit from EU on businesses and staff redundancies 62
Supports for business 63
Additional views on cross-border employment 65
Conclusion 68

List of Maps, Charts and Tables

Maps

Map 1: Northern Ireland Local Government Districts 9
Map 2: Regional Assemblies (Nuts 2) in Ireland 10
Map 3: NI and ROI counties 11
Map 4: Share of total employment commuting across national borders by Nuts 2 regions (2015) % of total employment 13
Map 5: Origin and destination of cross-border commuters from Ireland to work or study in Northern Ireland 50
Map 6: Origin and destination of cross-border commuter from Northern Ireland to work or study in Ireland 51

Charts

Chart 1: Age profiles of the populations of Northern Ireland (2021)and the Republic of Ireland (2022) 22
Chart 2: Highest Qualifications Attained by those aged 16-64 in Northern Ireland (2020 & 2021) 23
Chart 3: Highest Level of Education Attained by those aged 25-64 in RoI (2020 & 2021) 23
Chart 4: % of 25–64-year-olds having attained tertiary education in Northern Ireland (2019), and in each of the three Regional Assembly areas in the Republic of Ireland (2019 & latest 2021) 24
Chart 5: Age profiles of the population of the Northern Ireland-Ireland border region, % (2021) 27
Chart 6: Age profiles of the Border Regional Authority Area, % (2016) 28
Chart 7: % of VAT/PAYE registered businesses by LGD (NUTS 3 area) in Northern Ireland (2021 & 2022) 36
Chart 8: % of active enterprises by NUTS 3 area in the Republic of Ireland (2019 & 2020) 37
Chart 9: % of businesses in Northern Ireland by Broad Industry Group (2022) 38
Chart 10: % of VAT and/or PAYE registered businesses in Northern Ireland by employee size band (2022) 40
Chart 11: % of registered businesses in Northern Ireland by turnover size band (2022) 41
Chart 12: % of registered businesses by turnover size band, £ thousands (2022) 41
Chart 13: % of active enterprises in the Republic of Ireland by activity (2020) 42
Chart 14: % of employee jobs in Northern Ireland by broad sector (Q3 2022) 44
Chart 15: % of persons aged 15 years and over in employment by broad sector in the Republic of Ireland (Q3 2022) 45
Chart 16: % of persons aged 15 years and over in employment by broad sector in the Border Regional Authority Area (Q3 2022) 46
Chart 17: Size of businesses responding to the survey by number of employees 59
Chart 18: Nature of the main economic activity of the businesses 60
Chart 19: Barriers to recruitment 61
Chart 20: Barriers to cross-border recruitment 62
Chart 21: Cross-border staff working from home or on site since pandemic 63

Tables

Table 1: % of population with level 3 qualifications and above in NI 2016-2021 25
Table 2: Population of the Northern Ireland-Ireland Border Region 26
Table 3: Population densities in the Northern Ireland-Ireland border region (2016/21) 27
Table 4: Level of qualifications attained by % 16 to 64 years olds in 5 NI LGDs (2021) 29
Table 5: % of those aged 15 and over with 3rd level education, or no formal or only primary education (2016) 29
Table 6: Employment rate of 16-64 year olds in Northern Ireland by LGD (2021) 30
Table 7: Claimant Count as proportion of resident population aged 16-64 (December 2021 & 2022) 31
Table 8: ILO Participation Rate by NUT 3 region in the Republic of Ireland % (Q3 2021 & 2022) 32
Table 9: Labour force participation & unemployment rates of persons aged 15 and over (2016) 32
Table 10: GVA per head for LGDs in Northern Ireland (2019 & 2020) 33
Table 11: GVA per head for NUTS 3 areas in the Republic of Ireland, excluding the Mid West and South West (2019 & 2020) 34
Table 12: GDHI per head (£) for LGDs in Northern Ireland (2019 & 2020) 34
Table 13: Disposable income per person for NUTS 3 areas in the Republic of Ireland (2019 & 2020) 35
Table 14: % of Republic of Ireland enterprises by employment size (2020) 43
Table 15: % of employee jobs by broad sector in LGDs in Northern Ireland 2021 44
Table 16: Employment vacancies to DfC (2021/2022) 47
Table 17: Number of job vacancies in the Republic of Ireland by economic sector (Q3 2022) 48
Table 18: Year-on-year and quarterly % change in number of job vacancies (Q3 2022) 49
Table 19: Persons aged 15 years and over usually resident in Ireland by county of place of work in Northern Ireland and county of usual residence (2016) 52
Table 20: Northern Ireland residents (aged 16-74, excluding students) working in the Republic of Ireland (2011) 53
Table 21: Distribution of residents of 5 Northern Ireland LGDs according to their place of work in the Republic of Ireland (2011) 54
Table 22: Specific supports for business 63
Table 23: Comments or concerns regarding cross-border employment 65

Executive Summary

The Cross Border Partnership for Employment Services was established in 2022, succeeding the EURES Cross Border Partnership Ireland – Northern Ireland, with the objective of making things easier for people moving freely across the border in order to earn a living, to assist employers by providing them with access to a larger and more diverse workforce, and to assist those already working in the other jurisdiction. The EURES Cross Border Partnership Ireland – Northern Ireland had been in existence for over 20 years and was seen as a key contributor to the lives of the Cross Border worker, jobseeker, and employer. The Cross Border Partnership aims to continue the work that went before by addressing imbalances for its target groups through supporting employers in finding the skills sets required which can contribute towards the stability of the employment environment and through supporting jobseekers in cross-border movement.

This report provides up-to-date, tangible information on cross-border activity in the Ireland-Northern Ireland border region and builds upon reports undertaken previously by the EURES Ireland/Northern Ireland Cross Border Partnership in 2019, 2020 and 2021. The present report, commissioned by the Cross Border Partnership for Employment Services (CBPES), is intended to assist CBPES in supporting jobseekers, workers, and employers in the region, and to facilitate the Partnership in identifying the areas where it can employ its resources most effectively. The statistics used in this report have been sourced, wherever possible, from official statistical agencies, primarily the Central Statistics Office (CSO) in the Republic of Ireland, the Northern Ireland Statistics and Research Agency (NISRA) in Northern Ireland, EUROSTAT, and the Office for National Statistics (ONS).

Among the insights and reflections contained in this report, the following should be noted:

- Almost 20% (19.8%) of the population of the island of Ireland is resident in the Northern Ireland-Ireland border region, and it contains a relatively higher percentage of younger people in comparison to the overall composition of the populations in the respective jurisdictions.
- 19.2% of registered businesses on the island of Ireland are located in the Northern Ireland-Ireland border region, with a predominance of smaller businesses employing fewer than ten people.
- In 2022, 71% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five Local Government Districts[1] adjoining the border (no change from 2021), which also contained 60.1% of all construction businesses, 50.1% of all transport and storage businesses, 55.6% of all production businesses, and 49.1% of all retail businesses. In contrast, the same areas only contained 27.1% of all information and communication businesses, 35.4% of all finance and insurance businesses, and 37.9% of all professional, scientific and technical businesses.

[1] The LGDs are unitary administrations responsible for all areas of local government in Northern Ireland, and are equivalent to NUTS 3 areas; see Office of National Statistics, Detailed information on the administrative structure within Northern Ireland.

- The vast majority of businesses responding to the Cross Border Partnership for Employment Services survey were located in the border region, and 72.62% employed staff from the opposite jurisdiction.
- Among those businesses surveyed, the most frequent obstacle to recruitment in general was the lack of suitably skilled personnel, while for recruitment of cross-border workers it was wage expectations.
- Recurring themes in businesses' responses to the survey were difficulties in attracting candidates with the necessary skills and qualifications along with wage expectations.
- 66.7% of respondents to the survey indicated that the pandemic had affected their business, while 54.8% of respondents considered the UK's exit from the EU as having impacted their business.
- All of the LGDs/NUTS 3 areas in Northern Ireland within the border region should continue to be considered the most important sites in terms of cross-border labour mobility from Northern Ireland to the Republic of Ireland (North to South).
- The cross-border route between Derry & Strabane and Co. Donegal remains the most intensive for the mobility of labour, with the flow being stronger in numerical terms from Donegal to Derry & Strabane.
- Donegal, Monaghan, Louth and Cavan, four of the six Irish counties within the Northern Ireland-Ireland border region remain are points of origin for cross-border labour mobility into Northern Ireland (South to North), with significant numbers of workers undertaking this type of mobility.
- In December 2022, the total number of claimants in Northern Ireland stood at 36,345, which represents 3.1% of the Northern Ireland workforce (aged 16-64). In the same month, there were 114,500 persons unemployed in the Republic of Ireland, meaning an unemployment rate of 4.3%.

Introduction

The overarching purpose of this report is to provide up-to-date and tangible information on cross-border activity in the Northern Ireland-Ireland region that will assist the Cross Border Partnership for Employment Services (CBPES) in supporting jobseekers, workers, and employers in the region, and to facilitate the Partnership in identifying the areas where it can employ its resources most effectively.[2] The core elements of this report bring together the updated relevant information from the respective statistical agencies, which is produced on a regular basis, in both jurisdictions on the island of Ireland to all those with an interest in cross-border mobility.

This is the first yearly report from CBPES, but it builds upon equivalent reports commissioned by the EURES Ireland/Northern Ireland Cross-Border Partnership from 2019 to 2021. This report will broadly follow the same structure and aims of those previous reports, providing an updated picture of cross-border activity.

There have been previous analyses from a cross-border or all-island perspective. Indeed, this report makes use of some of those analyses in certain areas to provide background and context, such as using the information provided by the censuses carried out in the respective jurisdictions in 2011, from which Ireland's Central Statistics Office (CSO) and the Northern Ireland Statistics and Research Agency (NISRA) jointly produced a report in 2014 that "for the first time [...] draws together results from both censuses and explores both similarities and differences in the two populations as well as looking at how these populations have changed over time".[3]

In 2018 the Department for the Economy in Northern Ireland produced "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border".[4] This report had an intentional cross-border approach to its gathering and analysis of data, which not only included information on cross-border commuters, but went much further to look at subjects such as border communities and cross-border cooperation. In this case, however, the publication of what is a very valuable report was prompted by a "unique" circumstance: the United Kingdom's decision to leave the European Union.

The EURES Ireland/Northern Ireland Cross-Border Partnership had also commissioned a report in 2010 to address the need for a more accurate assessment of the nature of cross-border mobility.[5] However, that report's primary purpose was "to provide statistics on the number of people within the North West region who commute across the Northern Ireland/ Republic of Ireland border to work", and therefore was limited in its geographical scope.

This report by CBPES aims to address cross-border mobility within a wider geographical space that includes all of Northern Ireland and the border counties of Ireland. In terms of the areas of

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2 This report has been authored by Maureen O'Reilly (Senior Research Associate, Centre for Cross Border Studies), Anthony Soares (Director, Centre for Cross Border Studies), and Philip McCurley.

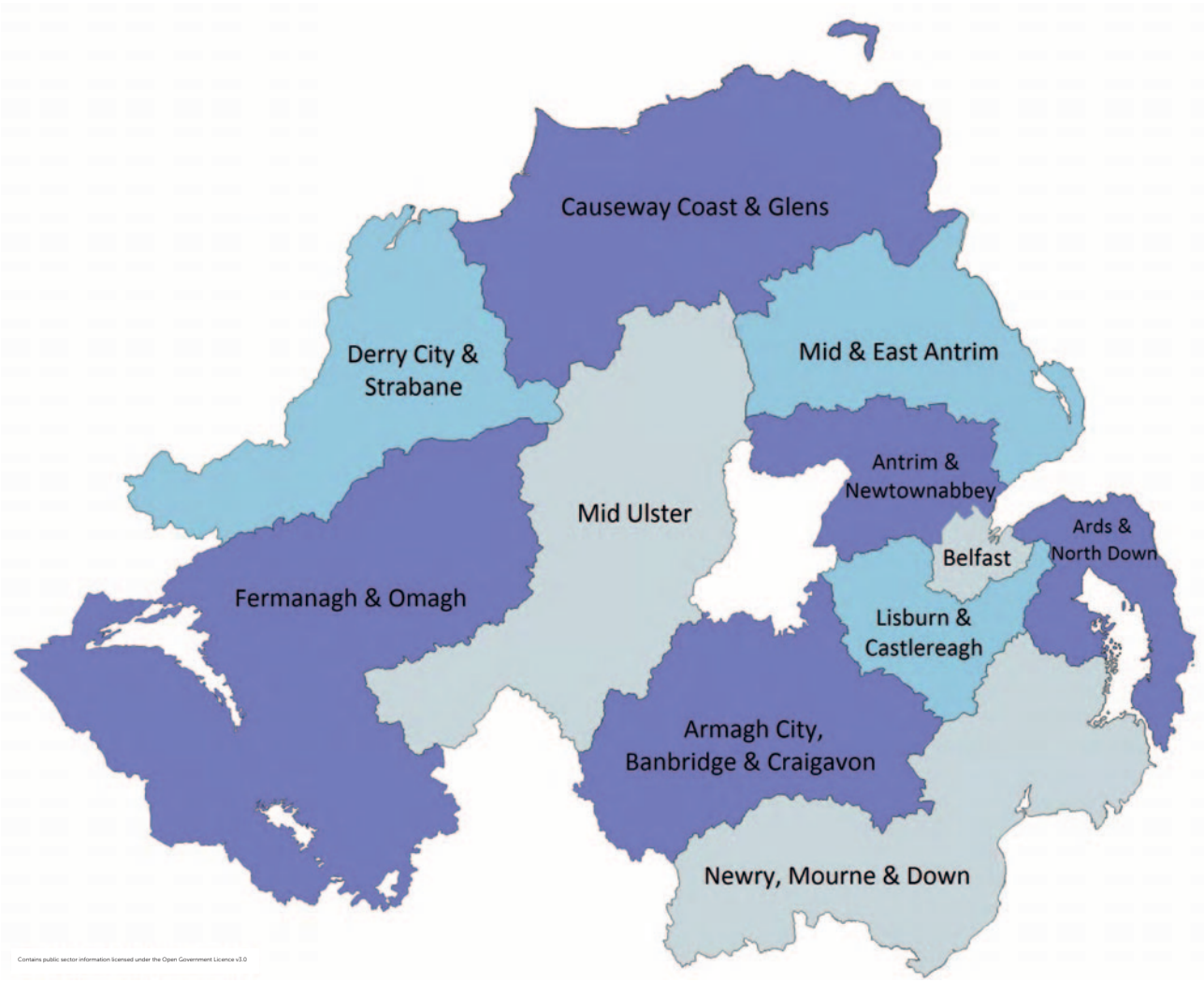
3 CSO and NISRA, "Census 2011: Ireland and Northern Ireland" (June 2014), p.5.

4 Department for the Economy "Background Evidence on the Movement of People across the Northern Ireland – Ireland Border" (March 2018)

5 Joe Shiels and Annmarie O'Kane, Centre for Cross Border Studies, "Measuring Mobility in a Changing Island: A report commissioned by the EURES Cross Border Partnership" (May 2010), p.5.

analysis in Northern Ireland, this includes the five local government districts adjoining the Northern Ireland-Ireland border: Armagh City, Banbridge & Craigavon Borough Council; Derry City & Strabane District Council; Fermanagh & Omagh District Council; Mid Ulster District Council; and Newry, Mourne and Down District Council (shown below in Map 1).[6]

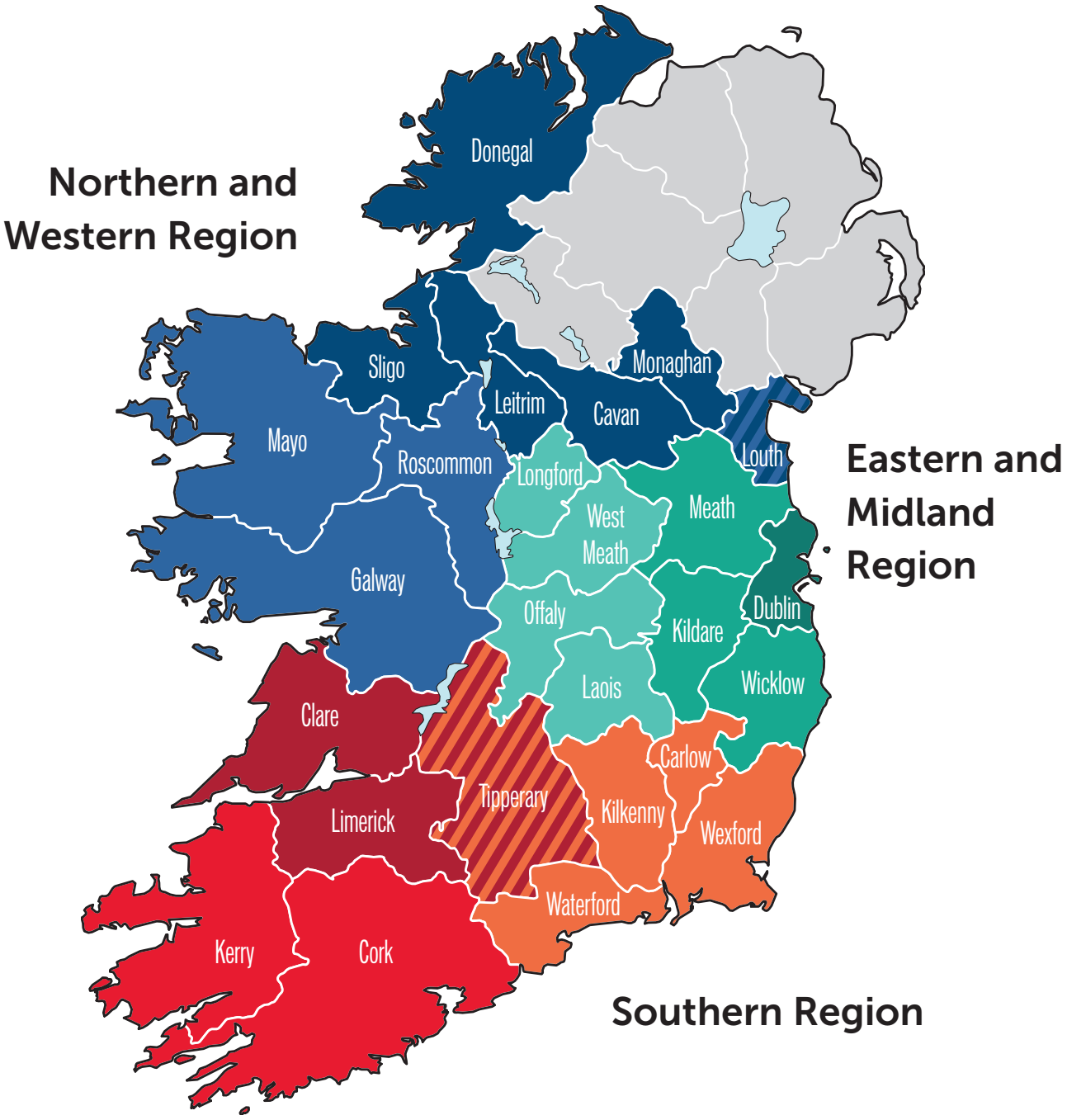
Map 1: Northern Ireland Local Government Districts



6 Department for Communities, Map of Northern Ireland Councils

In relation to the Republic of Ireland, the main areas of interest for this report are those counties located within the border region, specifically: Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo. It should be noted that these counties fall under two Irish administrative NUTS 3 areas. Five of the counties make up the NUTS 3 Border region: Cavan, Donegal, Leitrim, Monaghan and Sligo; while Louth is located within the NUTS 3 Mid-East region along with the non-border counties of Kildare, Meath and Wicklow. The NUTS 3 regions are in turn part of three Regional Assemblies (shown in below in Map 2), which are NUTS 2 areas:[7] Northern & Western (of which the border region is a part), Southern, and Eastern & Midland (of which the Mid-East region is a part).[8]

Map 2: Regional Assemblies (Nuts 2) in Ireland

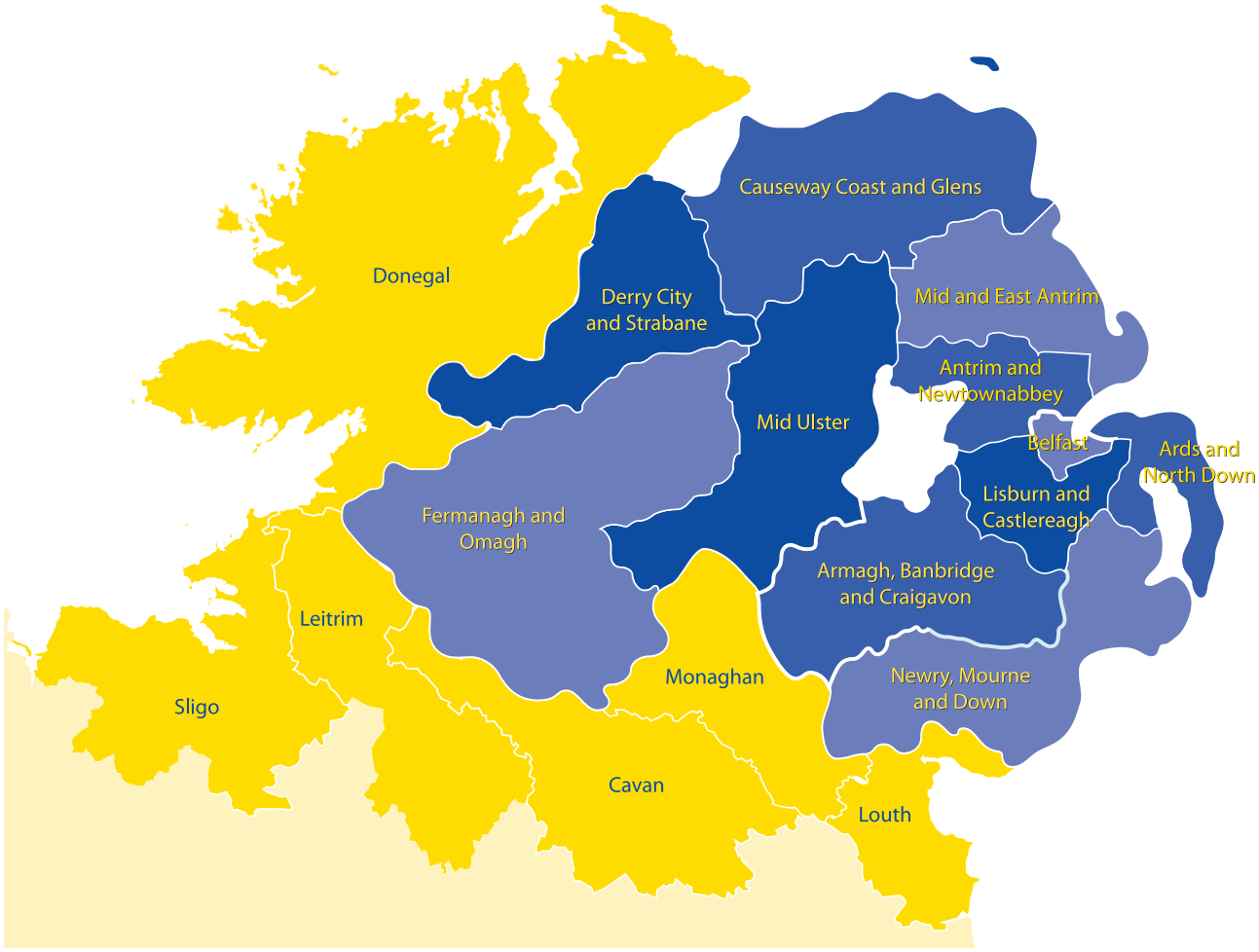


7 Institute of Public Administration, "Local and Regional Bodies in Ireland 2012-2016" (December 2016), p.7.

8 CSO, Information Note for Data Users: revision to the Irish NUTS 2 and NUTS 3 Regions.

So, while this report will also provide statistics at a national and regional level, these will be to provide context for the border region. The particular area of focus will be on the NUTS 3 regions, local government districts, and counties relating to the Northern Ireland-Ireland border region. These can be seen in Map 3 below.[9]

Map 3: NI and ROI counties



What follows in this report then, is an overview of the context in which cross-border mobility takes place on the island of Ireland, beginning with key population statistics for the Northern Ireland-Ireland border region and how these fit within their respective jurisdictional landscapes. It then offers a picture of economic activity within the region, before addressing the status of mobility across the border and highlighting some of the key findings from a survey of businesses undertaken by CBPES. But before doing so, it is important to address a major (and ongoing) challenge to a statistical analysis from a cross-border perspective.

9 SEUPB, "PEACE IV Programme Overview".

Counting cross-border workers: the statistical challenge

As has been highlighted in previous studies of cross-border mobility, a degree of caution is necessary when engaging in discussion and analysis of those who regularly cross the Northern Ireland-Ireland border to work. The 2010 report "Measuring Mobility in a Changing Island", commissioned by the EURES Ireland/Northern Ireland Cross-Border Partnership, alerted readers to the fact that "There are no centralised or categorised statistics recorded on the extent of cross-border mobility at all-island or regional level".[10] More recently, Northern Ireland's Department for the Economy's March 2018 report noted: "There is no one complete and definitive data source that records the number and purpose of all cross border movements between Northern Ireland, Great Britain and ROI [the Republic of Ireland]".[11]

This issue is not particular to the Northern Ireland-Ireland border. In looking at the provision of information services for cross-border workers at a European level, the Association of European Border Regions (AEBR) states: "There is a lack of reliable data. Therefore, it is difficult to say how many workers cross a European border several times per week in order to get from their homes to their workplaces".[12]

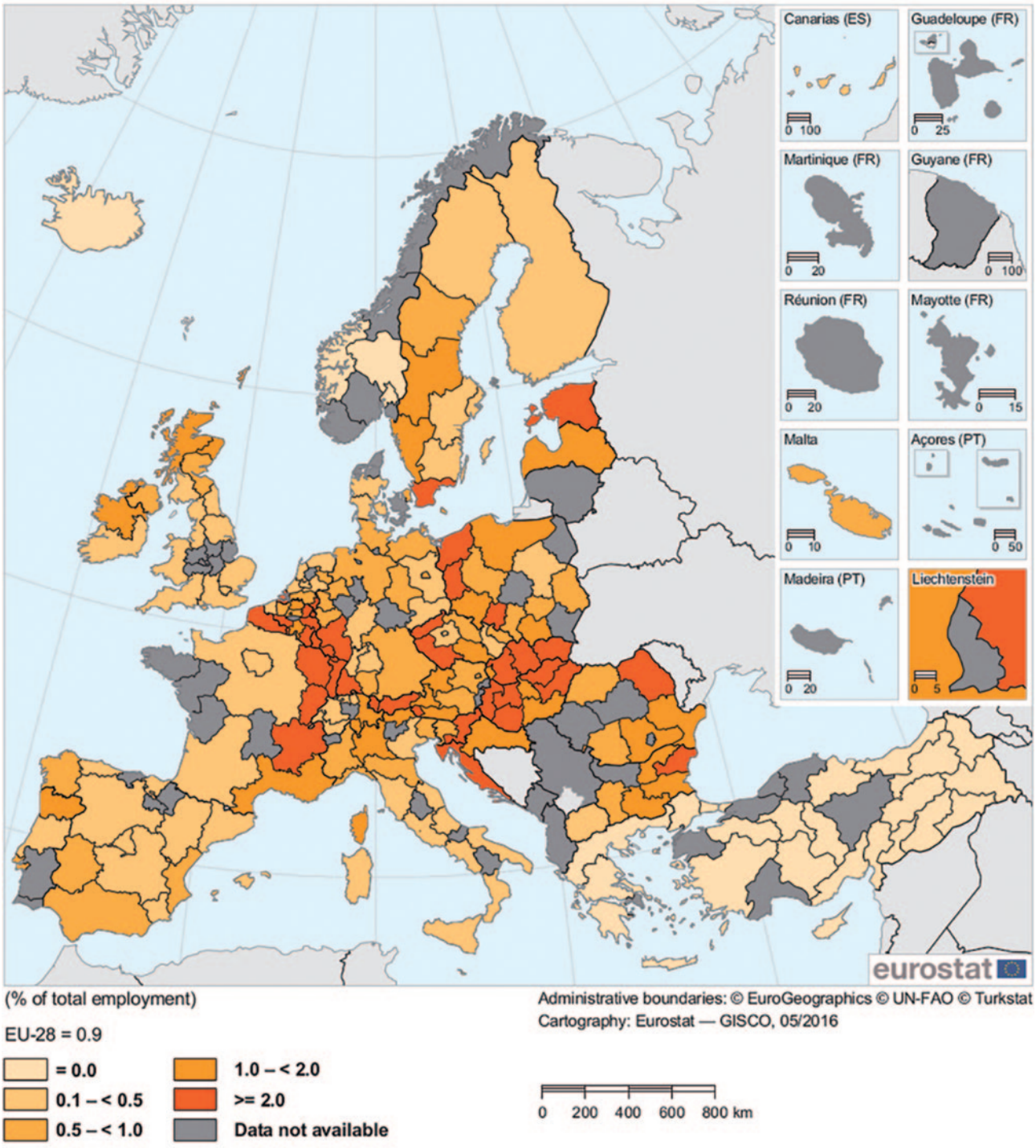
It is important to recall, therefore, that this report uses the most recent data available in each jurisdiction. However, at times this can mean that the data from each jurisdiction may relate to time periods that do not correspond neatly with each other. Nevertheless, the choice was made to use the most recent data and clarify any temporal disparities, rather than use earlier data in order to make comparisons that would have been more chronologically attuned but lacking in informative value.

[10] Joe Shiels and Annmarie O'Kane, Centre for Cross Border Studies, "Measuring Mobility in a Changing Island: A report commissioned by the EURES Cross Border Partnership" (May 2010), p.5.

[11] Department for the Economy "Background Evidence on the Movement of People across the Northern Ireland – Ireland Border" (March 2018), p.4.

[12] AEBR, "Information services for cross-border workers in European border regions" (October 2012) p.1.

Map 4: Share of total employment commuting across national borders by Nuts 2 regions (2015) % of total employment



Nevertheless, a report for the European Commission put the figure of cross-border workers in the EU in 2019 as comprising 1.5 million,[13] and this is simply an example of an analysis at EU-level of statistics related to cross-border mobility.

Map 4 above displays statistics on the share of total employment commuting across borders by NUTS 2 regions from the 2016 edition of Eurostat's regional yearbook.[14] This information, while useful in setting a broader context, does not allow us to gain any insight into cross-border mobility on the areas in the Northern Ireland-Ireland border area with which this report is concerned. Moreover, as a result of Brexit more recent data produced at an EU level no longer includes the UK and, therefore, Northern Ireland.

The need for caution needs to be reinforced when making definitive statements regarding the numbers of citizens involved in cross-border mobility in this geographical space. The Northern Ireland Department for the Economy's March 2018 report underlines why this is the case, referring to the existence of different estimates as to how many people commute across the Northern Ireland-Ireland border, and putting forward an estimate of its own:

> *The exact number of people that cross the border to work or study is difficult to quantify. The Centre for Cross Border Studies has used a variety of studies to provide an estimate that there are between 23,000 and 29,000 people who commute across the border. Based on the available information, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable.*[15]

Further on in its report, the Department for the Economy notes how the Centre for Cross Border Studies' "figures are higher than the statistics reported in the 2011 Censuses for NI and ROI [which] report that a total of 14,800 persons regularly commuted between Northern Ireland and ROI to their main place of work or study". It goes on to offer possible reasons as to the different estimates:

> *However due to how the question in the Census is asked, these figures will exclude self-employed people e.g., freight drivers, builders who work on both sides of the border or do not have a fixed place of work for example. They will also exclude people who work/study mainly from home but are occasional cross-border travellers (such as those working in sales or construction). Therefore, the difference in the estimates produced in the Censuses and the estimate from the Centre for Cross Border Study research can be explained by the different methodologies and questions asked.*[16]

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13 European Commission, "Annual Report on Intra-EU Labour Mobility 2020" (December 2020), p.14: "In 2019 there were 1.5 million cross-border workers within the EU-28 (a decrease of 0.6% in comparison to 2018) and 1.9 million cross-border workers within the EU-28 and EFTA countries (an increase of 0.9% in comparison to 2018)," p.14.; "The number of cross-border workers in EU and EFTA countries increased by 0.9% between 2018 and 2019 and reached 1.89 million. Looking only at cross-border mobility between EU-28 countries, that number was at 1.5 million and decreased by 0.6%, or ca. 9 000 persons, on 2018. The decrease was slightly larger in the EU-27, with 10 900 or 0.8% fewer than in 2018", p.70.

14 Eurostat, "Share of total employment commuting across national borders, by NUTS 2 regions, 2015".

15 Department for the Economy "Background Evidence on the Movement of People across the Northern Ireland – Ireland Border" (March 2018), p.18.

16 Ibid, p.18.

Beyond the numbers of those involved in cross-border mobility on the island of Ireland, there are also difficulties in making direct statistical comparisons between Ireland and Northern Ireland. As previously highlighted, this is often due to differences in how and when data is collected on the two sides of the border, which although usually minor in nature nevertheless mean a degree of caution is always necessary. Despite these difficulties, a good degree of understanding can be reached of the nature of cross-border mobility across the Northern Ireland-Ireland border, and how the populations living in the cross-border region fare in comparison to the wider population in either jurisdiction.

The Context for cross-border mobility on the island of Ireland

Until recently, underpinning much of the context for cross-border mobility on the island of Ireland were the frameworks, legislation, funding programmes and relevant instruments derived from Ireland and the UK's common membership of the European Union. However, as a consequence of Brexit, cross-border mobility on the island of Ireland now takes place under new frameworks. The Withdrawal Agreement and its Protocol on Ireland/Northern Ireland have sought to ensure that much of the conditions for cross-border mobility on the island of Ireland will continue to exist. Further, the UK and Irish governments' commitment to preserve the Common Travel Area (CTA), and associated rights aims to mitigate many potential issues for British and Irish nationals who cross the border regularly, with the UK government confirming that "You will not pass through any immigration control when you enter the UK from Ireland across the land border".[17] However, the EU Settled Status[18] and Frontier Worker Permit[19] schemes implemented by the UK following Brexit have and will continue to result in increased checks on EEA nationals (residing in both Ireland and Northern Ireland) when attempting to access various services in Northern Ireland such as employment, housing, education, and healthcare. To illustrate this, by September 2022 112,990 applications to the EU Settled Status scheme were made in Northern Ireland (102,260 had been made by September 2021).[20] With regard to the Frontier Worker Permit Scheme, while not all of these application will have been made with the aim of working in Northern Ireland, between Q4 of 2020 when the scheme was launched, and Q3 of 2022 (the most recent data available), 18,014 applications to the Frontier Worker Permit scheme had been made, of which 12,419 had been issued.[21]

The UK-EU and UK-Irish efforts to preserve the conditions that the 1998 Belfast/Good Friday Agreement helped to create have meant that the unique impetus for cooperation and mobility between the two jurisdictions on the island of Ireland as part of what is an ongoing peace and reconciliation process should be able to continue.

Strand 2 of the 1998 Agreement established the North South Ministerial Council "to bring together those with executive responsibilities in Northern Ireland and the Irish Government, to develop consultation, co-operation and action within the island of Ireland – including through implementation on an all-island and cross-border basis – on matters of mutual interest within the

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17 UK Visas and Immigration, "Travelling to the UK from Ireland, Isle of Man, Guernsey or Jersey" (updated 23 November 2021).

18 EU Settlement Scheme: EU, other EEA and Swiss citizens and their family members (2021)

19 Frontier worker permit scheme guidance (2021)

20 Home Office, EU Settlement Scheme quarterly statistics, September 2022 (updated 25 November 2022). The data on applications by local authority is contained in the EU Settlement Scheme local authority tables, which show that by September 2022 Armagh, Banbridge and Craigavon had received the highest number of applications in Northern Ireland (25,390), followed by Belfast (22,100), with Mid Ulster coming third (19,360).

21 Home Office, Why do people come to the UK? To work (updated 23 September 2022). The relevant statistics can be found in the data set "Entry Clearance Visas – Applications and Outcomes", with numbers of applications made to the Frontier Worker Permit scheme (a Visa type subgroup) available in the pivot table "Applications for entry clearance visas", and the numbers issued in the pivot table "Outcomes of applications for entry clearance visas".

competence of the Administrations, North and South".[22] It also led to the establishment of six implementation bodies, including InterTradeIreland, which supports the development of cross-border trade, and the Special EU Programmes Body, which is the managing authority for the INTERREG and PEACE programmes, and will manage the successor programme, PEACE PLUS.

As well as setting the overall policy direction for the implementation bodies, the North South Ministerial Council (NSMC) is the forum for the two administrations on the island of Ireland to agree common policies and approaches in six areas of cooperation, which are implemented separately in each jurisdiction. These six areas, Agriculture, Education, Environment, Health, Tourism and Transport, can be said to impact on the context for cross-border mobility. For example, in these areas the NSMC has driven work on the recognition of qualifications, encouraged cooperation on cancer research, and approached transport policy within an all-island dimension.

However, while the Northern Ireland-Ireland border region may have a number of obstacles to cross-border mobility in common with border regions in the EU, it also has others that are specifically related to the legacy of the conflict. This was reflected in the Cooperation Programme for PEACE IV, which set out the background to the region in which projects to be supported by this EU funding stream would be operating in the 2014-2020 programming period:

> *"The history of the region and the relationship between the two parts of the island has resulted in the border becoming a barrier to economic and social development. [...] The effects of the troubles/conflict on the Border Region of Ireland have been pronounced; the border towns in particular saw widespread division and disturbance which has continued to leave their mark".*[23]

Following Brexit both the UK and EU reaffirmed their commitment to the PEACE and INTERREG programmes which, under the funding framework agreed for 2021-2027, has been combined under the PEACE PLUS programme:

> *"PEACE PLUS is a new cross border programme that will contribute to a more prosperous and stable society in Northern Ireland and the Border Region of Ireland. The programme will achieve this by funding peace building activities and by funding activities that contribute to the cross border economic and territorial development of the region. The combination of the PEACE INTERREG type activities in a single programme and will include not only Peace building activity but also wider North/South economic, social and environmental activities of mutual interest, which are normally associated with an INTERREG programme".*[24]

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22 www.gov.uk/government/publications/the-belfast-agreement.

23 SEUPB, PEACE IV Cooperation Programme, p.7.

24 European Territorial Co-operation 2021-2027: Preparing the EU PEACE PLUS Programme for the 2021 – 2027 period, p.3.; UK announces majority contribution to PEACE PLUS funding.

The Cross Border Partnership for Employment Services

The Cross Border Partnership for Employment Services is an alliance consisting of representatives from the Employment Services in the Republic of Ireland (Department of Social Protection DSP), the Employment Services in Northern Ireland (Department for Communities DfC), Trade Unions from both sides of the border (Belfast Unemployed Resource Centre NI and UNITE the Union Republic of Ireland), Chambers of Commerce (The Londonderry Chamber of Commerce from NI and Dundalk Chamber of Commerce from Republic of Ireland), and Employer Organisations, namely The Confederation of British Industry (CBI in NI) and the Irish Business and Employers' Confederation (IBEC in the Republic of Ireland).

It was established in 2022, succeeding the EURES Cross Border Partnership Ireland-Northern Ireland, with the objective of making things easier for people moving freely across the border to earn a living, to assist employers by providing them with access to a larger and more diverse workforce and to assist those already working in the other jurisdiction. The EURES Cross Border Partnership in Ireland-Northern Ireland had been in existence for over 20 years and was seen as a key contributor to the lives of the Cross Border Worker, jobseeker and employer. The Cross Border Partnership aims to continue the work that went before by addressing imbalances for its target groups through supporting employers in finding the skills sets required which can contribute towards the stability of the employment environment and through supporting jobseekers in cross border movement.

The aim of the Cross Border Partnership is to promote the benefits of cross border labour mobility and to increase awareness of job opportunities and economic development across the region. Through the respective Public Employment Service bodies either side of the border, along with key strategic partners, it provides opportunities for employers and job seekers to realise the full potential of having access to a larger labour market, along with free offer of support throughout the border region.

The Partnership provides clear factual information and advice on working and living conditions to those citizens in both jurisdictions in the cross-border region, and the information it produces is highly regarded by end users and organisations alike.

The Partnership covers all of Northern Ireland and the border counties of Ireland (Louth, Cavan, Monaghan, Donegal, Sligo, and Leitrim). The main target groups for the Cross Border Partnership for Employment Services include:

- Frontier Workers in the region
- Employers in the region experiencing skills shortages
- Jobseekers in the border counties
- SMEs in the region
- Unemployed Young People who are living in the Border Region
- People who are long-term unemployed who are living in the Border region
- EU Migrants living or working in the Border region with language deficits
- Public Employment Service Officers in the region
- Women returners
- Community Groups
- University Students and Graduates

Information Sources

All sources of information used in this report have been identified and links provided to those sources. This report privileged the examination of data provided primarily by the official statistics agencies in the two jurisdictions on the island of Ireland: the Central Statistics Office (CSO) and the Northern Ireland Statistics and Research Agency (NISRA). However, in respect of Northern Ireland, some data was sourced from the UK's Office for National Statistics (ONS). These sources were given primacy as they are providers of sets of data produced on a regular basis, which allows for much of the information set out in this report to be updated in the future.

Where the report examines cross-border mobility, it also draws on additional material produced by Northern Ireland's Department for the Economy, and in its analysis of data related to the labour market, information was also gathered from data produced by Northern Ireland's Department for Communities. However, in order to supplement information provided by central statistical agencies and government departments in relation to job vacancies, the report also uses information produced by recruitment agencies.

The Statistics

Before presenting key statistics for the Northern Ireland-Ireland border region, it is important to be aware of the general statistical profile of the two jurisdictions on the island of Ireland.

Key Statistics for Northern Ireland and the Republic of Ireland

On Census Day 2021 the total population of Northern Ireland numbered 1,903,175. This was an increase of 92,300 or 5.1% on the 1,810,863 population recorded in the 2011 Census[25] and an increase of 7,665 on the 2020 mid-year population estimates.[26] Population estimates for the Republic of Ireland are available for April 2022, at which time the population stood at 5,100,200, representing an increase of 1.8%, or 88,700 people on 2021,[27] putting the total population of the island of Ireland at approximately 7,003,475. In Northern Ireland in 2021 natural change (births minus deaths) accounted for approximately 4,513 of the population increase.[28] In the Republic of Ireland, natural change increased the population by 26,700 between 2021 and 2022, while net migration contributed 61,100 to the population total.

The population of Northern Ireland comprised 967,043 (50.8%) females and 936,132 (49.2%) males in 2021.[29] This is similar to the 2022 data for the Republic of Ireland where the population is 50.6% female and 49.4% male.[30] Those populations ae spread across their respective jurisdictions so that in 2016 (the most recent data available) the average population density in the Republic of Ireland was 70 persons per km^2,[31] and in 2020 in Northern Ireland (the most recent data available) it was 139.8 persons per km^2.[32]

The age profiles of the two populations show that those aged 65 years or more in 2021 made up a greater percentage of Northern Ireland's population (17.2%) than the same cohort within the population of the Republic of Ireland in 2022 (15.1%), as can be seen in Chart 1 below. [33] Between 2020 and 2021, the proportion of the population aged 65 years and over has increased in both jurisdictions from 16.9% to 17.2% in Northern Ireland and from 14.8% (2021) to 15.1% (2022) in the Republic of Ireland reflecting a general trend towards an aging population in both jurisdictions.

25 NISRA, "Census 2021 Lookup Tables".

26 NISRA, Mid-year population estimates, 2020.

27 Note that, at time of writing, the 2021 Census results were the most recent population estimates available for Northern Ireland, while the Republic of Ireland estimates were available up to 2022; CSO, Population and Migration Estimates (April 2022).

28 NISRA, Registrar General Annual Report, 2021.

29 NISRA, "Census 2021 Lookup Tables".

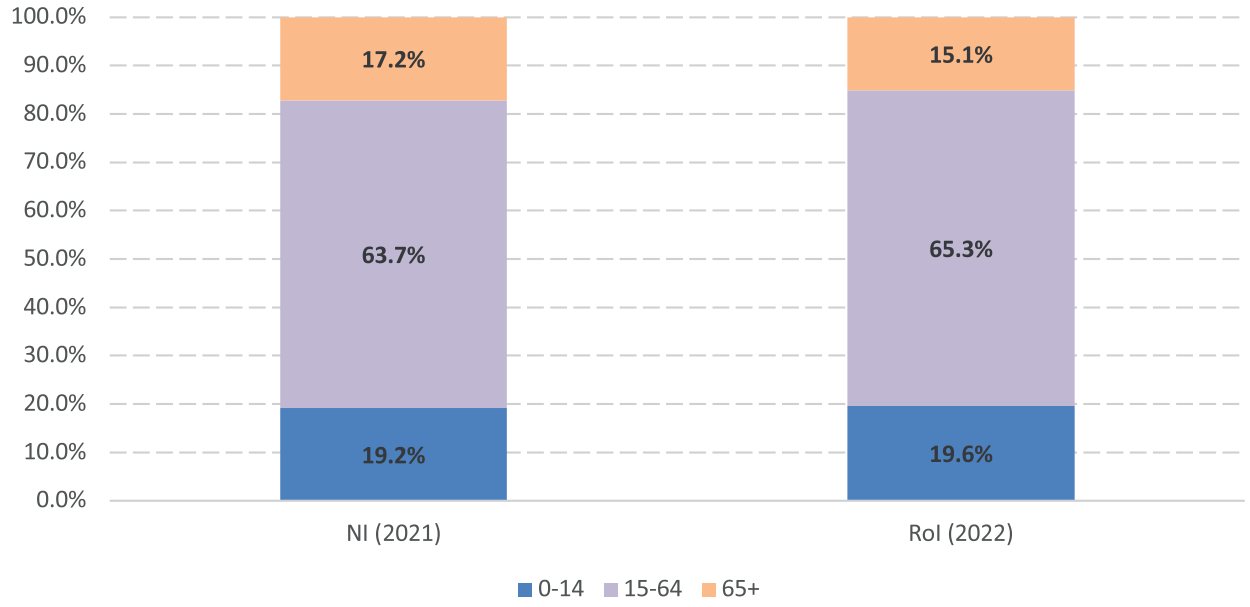
30 CSO, Population and Migration Estimates (April 2022).

31 CSO, "Regional SDGs Ireland 2017 – Population density by region, 2016".

32 NISRA, "NISRA Statistical Bulletin: 2020 Mid-year Population Estimates for Northern Ireland – All areas – population densities" (25 June 2021).

33 NISRA, "Census 2021 Main Statistics for Northern Ireland" Statistical Bulletin – Demography and Households, (22 September 2022); CSO Population and Migration Estimates (April 2022).

Chart 1: Age profiles of the populations of Northern Ireland (2021) and the Republic of Ireland (2022)



One of the key points highlighted by NISRA in relation to the results of the 2021 census is that:

> *"Population increase [in Northern Ireland] was greatest in the older age groups. The number of people aged 65 or more rose by over 60,000, to nearly one-third of a million people in Census 2021 – a near 25% increase on 2011 and demonstrates the scale of population change due to ageing".*[34]

However, while those aged 65 and over in 2021 make up a larger percentage of the population in Northern Ireland than in the Republic of Ireland, the CSO noted in the 2016 Census that, "While the number of people aged 15-64 increased by 44,477 since 2011, the number of those aged 65 and over rose by 102,174 – more than twice that amount".[35] Nevertheless, the percentage of those aged 65 and over in both jurisdictions is significantly below the overall percentage for the EU-27, which stood at 20.8% in 2021.[36] The percentage of the population 65 years of age and over in both jurisdictions on the island of Ireland is also below the UK average, which stood at 18.7% in mid-2021.[37]

In terms of education, in 2019 8.8% of 18-24 year-olds in Northern Ireland were classed as early leavers from education and training, which was a decrease from 9.4% in 2018. This is currently the latest data available for Northern Ireland. In the Republic of Ireland however, the equivalent figures for 2018 and 2019 were 5.0% and 5.1% which is significantly lower than the Northern Ireland figures. Data is available up to 2021 for the Republic of Ireland and by 2021, just 3.3% of 18-24 year olds were classed as early leavers from education and training.[38]

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34 NISRA, "Census 2021 Main Statistics for Northern Ireland" Statistical Bulletin – Demography and Households, p.2.

35 CSO, "Census of Population 2016 – Profile 3 An Age Profile of Ireland: Average Age and Dependency".

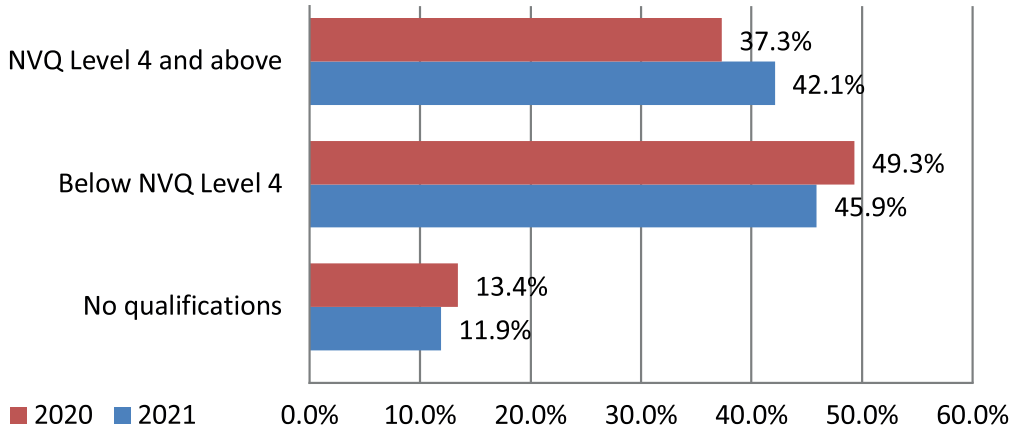
36 Eurostat, "Proportion of population aged 65 and over".

37 ONS, "Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland, Mid-2021 edition of this dataset (21 December 2022).

38 Eurostat, "Early leavers from education and training by sex and NUTS 1 regions". The equivalent statistic for the EU-27 is 10.2%, while it is 10.9% for the whole of the UK.

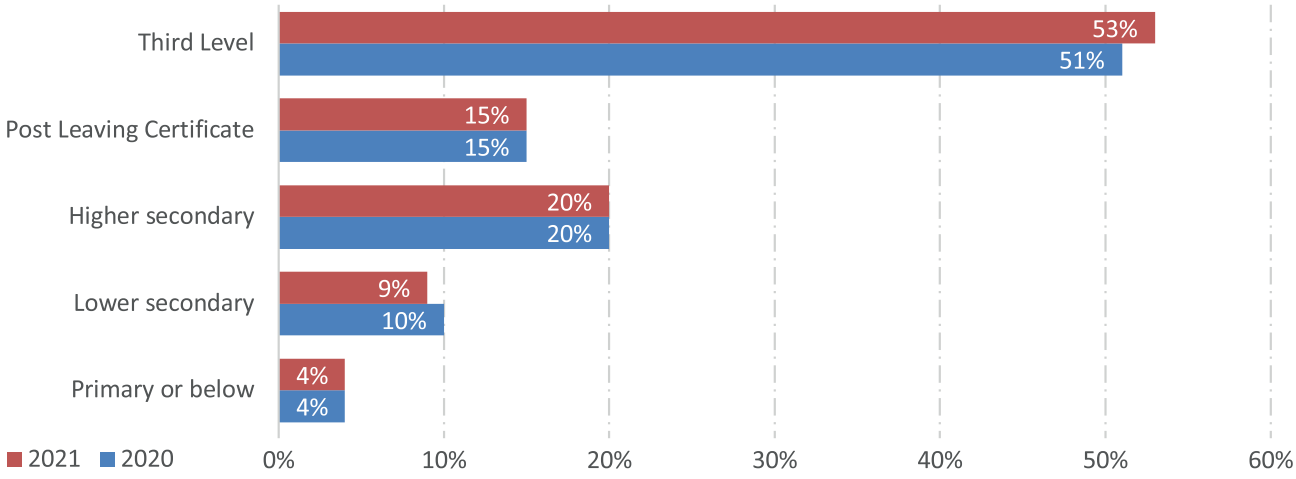
The disparity between the two jurisdictions on the island of Ireland is further shown when considering the qualification levels of the workforce. NISRA estimates are based on the Labour Force Survey and estimates are provided for the working age population, the 16 to 64 age-group, which shows 11.9% of this cohort as having no qualifications in 2021, down from 13.4% in 2020.[39] In 2021 the largest percentage of the 16-64 age group in Northern Ireland (45.9%) had a qualification below NVQ Level 4 (down from 49.3% in 2020), while 42.1% had a qualification at NVQ Level 4 or above, up from 37.3% in 2020.[40]

Chart 2: Highest Qualifications Attained by those aged 16-64 in Northern Ireland (2020 & 2021)



For the Republic of Ireland, qualification levels are available for the age groups 15-64 or 25-64 and the highest level of education attained by those aged 25 to 64 years is shown in Chart 3 below.[41]

Chart 3: Highest Level of Education Attained by those aged 25-64 in RoI (2020 & 2021)



[39] NISRA, "Labour Market Structure – Employment Activity and Qualifications level by Local Government District 2009-2021" (13 October 2022).

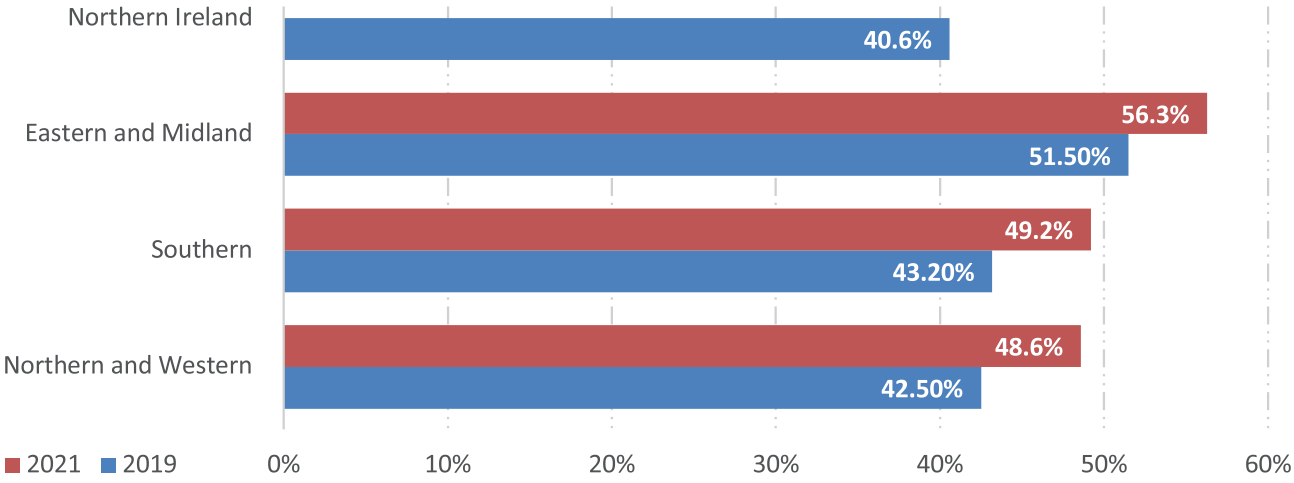
[40] NVQ Level 4 to 5 is broadly equivalent to a Foundation degree, HNC/HND/BTEC higher.

[41] CSO, "Educational Attainment Thematic Report 2021" (Quarter 2, 2021).

In contrast to Northern Ireland, in 2021 53% of the population of the Republic of Ireland (bearing in mind the different age categories used in relation to the two jurisdictions) possessed a third level qualification, with 15% achieving a post-leaving cert qualification, and 13% of all 25–64-year-olds in the Republic of Ireland having a lower secondary or below level of education, down from 14% in 2020.[42]

According to Eurostat, in 2019, 40.6% of those aged 25 to 64 in Northern Ireland had attained a tertiary education which was lower than the that achieved across the three NUTS 2 regions in the Republic of Ireland. 2021 figures are available for the Republic of Ireland and in 2021 a higher percentage of 25 to 64 year-olds had attained a tertiary education in all three of the Republic of Ireland's Assembly Regions (equivalent to NUTS 2 regions) as shown in chart 4.[43]

Chart 4: % of 25–64-year-olds having attained tertiary education in Northern Ireland (2019), and in each of the three Regional Assembly areas in the Republic of Ireland (2019 & latest 2021)



Given that figures from Eurostat no longer include data for the UK, it is possible to refer to a more recent release from the NISRA LFS (November 2022), which provides Level 2 and above and Level 3 and above qualifications by age groups 16-24, 25-34, 35-49 and 50-64 in Northern Ireland. The qualification levels are assigned according to the National Qualification Framework (NQF) base and are broadly equivalent to the following:

- Level 2: O-level, GCSE grade A*-C - 5 or more
- Level 3: A-level - more than 1 (or higher)

42 CSO, "Educational Attainment Thematic Report 2021" (Quarter 2, 2021).

43 Eurostat, "Tertiary educational attainment, age group 25-64 by sex and NUTS 2 regions" (TGS00109). It is important to note the following in terms of the availability of Eurostat data relating to the UK, and therefore the availability of data relating to Northern Ireland: "A new Trade and Cooperation Agreement between the European Union and the United Kingdom has been concluded and applies on a provisional basis as from 1 January 2021. It includes a provision on statistical cooperation that foresees the establishment of a specific arrangement [...]. Until this arrangement on statistical cooperation is established, addressing in particular the scope and means of data transmission, there are changes for the dissemination of UK data by Eurostat, with the exception of cases foreseen in the Protocol on Ireland/Northern Ireland. This means that until agreement on statistical cooperation is established, Eurostat is no longer disseminating new data for the UK, neither through its database nor in other dissemination products" (ec.europa.eu/eurostat/help/faq/brexit).

At this point it is worth noting that the level 3 achievement includes A-level attainment, so the figures are not directly comparable with the Eurostat figures. Nonetheless, as presented in Table 1, it can be seen that the numbers achieving level 3 and above qualifications in Northern Ireland have increased for each of the age groups presented between 2016 and 2021. While approximately 70% of persons aged between 25-34 have at least a level 3 qualification, just 50% of persons aged 50-64 have this level of qualification.

Table 1: % of population with level 3 qualifications and above in NI 2016-2021

	% with Level 3 and above qualifications		
	Age 25-34	**Age 35-49**	**Age 50-64**
2016	59.1	54.7	42.0
2017	60.9	58.4	41.9
2018	63.1	60.2	44.4
2019	66.3	61.3	47.2
2020	72.5	61.9	45.9
2021	69.5	68.5	49.9

In terms of engagement in the labour market, the ILO participation rate for those aged 15 and over in the Republic of Ireland in Quarter 3 of 2022 stood at 64.8%, which is a decrease on the same period in 2021 when the participation rate was 65.1%. The unemployment rate in quarter 3 of 2022 was 4.5%, down from 5.7% in the same quarter of 2021.[44] In Northern Ireland, the employment rate for those aged 16 to 64 was 70.1% in July-September 2022, up from 68.1% from the same period in 2021. The unemployment rate for those aged 16 and over in July-September 2022 was 3.0%, down from 4.3% in the same quarter of 2021.[45]

There is, of course, mobility between the two jurisdictions on the island of Ireland for a variety of purposes, and not restricted to those living within the Northern Ireland-Ireland border region. In 2018, Northern Ireland's Department for the Economy estimated, for example, that just over 118,000 vehicles cross the border each day at 15 major crossing points, totaling 43 million vehicle crossings each year (excluding traffic at other minor crossing points), with the northbound and southbound flows being fairly even.[46] It also reported one transport company's (Translink, which is the main public transport provider in Northern Ireland) estimate of 900,000 cross-border coach passenger journeys and a further 868,532 cross-border rail journeys in 2016/17. In customer research carried out by Translink in 2016, 40% of those travelling on the Enterprise train service between Belfast and Dublin in 2016 were doing so for business purposes; 41% of business travelers on the Enterprise were doing so weekly.[47]

44 CSO, "Labour Force Survey Quarter 3 2022: Unemployment".

45 NISRA, Northern Ireland Labour Market Report.

46 Department for the Economy, "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border", p.11.

47 "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border", pp.13-14.

The profile of the Northern Ireland-Ireland Border Region

An estimate for the percentage of the total population of the island of Ireland that resided in the Northern Ireland/Ireland Border region in 2021 would place it at 19.8% (using 2021 NISRA Census data and 2021 CSO population estimates data).[48] This proportion remains unchanged from 2020 estimates. As can be seen in Table 2 overleaf, the overall estimated total population in the Northern Ireland-Ireland border region increased by 0.7% between 2020 and 2021 which is more than the previous year when the population of the Northern Ireland-Ireland border region increased by just 0.3%. This rate of increase in the border region was equivalent to the increase in the estimated total population growth in the Republic of Ireland, which also grew by 0.7% in the year to April 2021 (from 4,977,400 in 2020 to 5,011,500 in 2021), but above that of the total population growth in Northern Ireland, which saw growth of 0.4% from mid-2020 to 2021 (from 1,895,510 in June 2020 to 1,903,175 on Census Day in 2021).

Table 2: Population of the Northern Ireland-Ireland Border Region[49]

	2020	2021	Change
Border	407,900	412,600	1.2%
Louth	136,792	139,100	1.7%
Armagh, Banbridge & Craigavon	217,200	218,656	0.7%
Newry, Mourne & Down	181,700	182,074	0.2%
Derry City & Strabane	151,100	150,756	-0.2%
Mid Ulster	149,000	150,293	0.9%
Fermanagh & Omagh	117,300	116,812	-0.4%
Total	**1,360,992**	**1,370,291**	**0.7%**

Placing these trends in population growth into a historical context, and by using the CSO's 2016 Census data to capture the rates of population growth within the Border Regional Authority's constituent counties,[50] it can be seen that the border region grew by 5.8% between 2016 and 2022, with the population growth greatest in County Leitrim at 9.5% and lowest in County Donegal at 4.5%. All Border Regional Authority's constituent counties experienced significant population growth between 2016 and 2022.[51]

The population is spread unevenly across this geographical area. In 2016 the population density of the Border Regional Authority Area was 35 persons per km^2, although Co. Louth's population density is estimated to be 156 persons per km^2, which would make it the second most densely populated in the Northern Ireland-Ireland border region, behind Armagh, Banbridge & Craigavon in Northern Ireland.

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48 NISRA, 2021 Census and CSO, Population and Migration Estimates April 2021. There are more recent CSO population estimates in relation to the Republic of Ireland, for April 2022. These place the population of the Border Regional Authority area at 420,900, which would represent a year-on-year 2% increase; CSO, Population Estimates April 2022.

49 Data for table 2 taken from NISRA 2021 Census Results and table PEA04 (2022) from the CSO. Louth data taken from the 2022 CSO preliminary census results.

50 The term "Border Regional Authority area" is being employed in this study as a means to distinguish administrative areas in the Republic of Ireland from those in Northern Ireland, but this administrative division was abolished following the Local Government Reform Act 2014, which replaced regional authorities with regional assemblies.

51 The population growth in the other counties in the 2016-2022 period was: Cavan 6.6%, Monaghan 5.6%, and Sligo 6.5%.

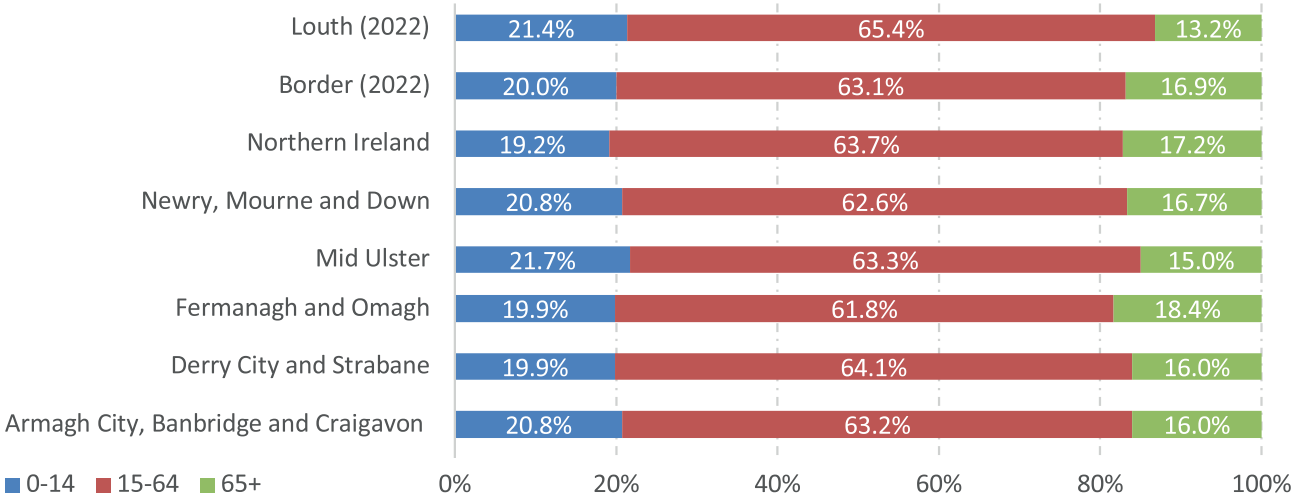
When examining the population densities in the Northern Ireland side of the border region there is more up-to-date data available (2021),[52] with Armagh City, Banbridge & Craigavon having the highest at 164.2 persons per km^2 (Table 3). These disparities in terms of population densities can be seen as reflecting the region's predominantly rural nature, with a small number of urban clusters.

Table 3: Population densities in the Northern Ireland-Ireland border region (2016/21)

	Population Density (persons per km2)
Armagh, Banbridge & Craigavon	164.2
Co. Louth (2016)	156
Derry City & Strabane	121.84
Newry, Mourne & Down	111.82
Mid Ulster	82.44
Fermanagh & Omagh	41.19
Border Regional Authority Area (2016)	35

The Northern Ireland-Ireland border region contains a relatively higher percentage of younger people in comparison to the overall composition of the populations in the respective jurisdictions. In the Republic of Ireland in 2022, 19.6% of the population was aged 0 to 14 while the equivalent figure in Northern Ireland (2021) is 19.2%. As Chart 5 illustrates, all of the areas within the geographical scope of this study had higher percentages of younger people than the jurisdictions at large (albeit marginal for some).[53]

Chart 5: Age profiles of the population of the Northern Ireland-Ireland border region, % (2021)[54]



[52] CSO, "Regional SDGs Ireland 2017 – Population density by region, 2016" and NISRA, Census 2021 Population Density. The source for the population density of Co. Louth was Louth County Council's "Louth – Healthy County Plan 2018-2022", p.3.

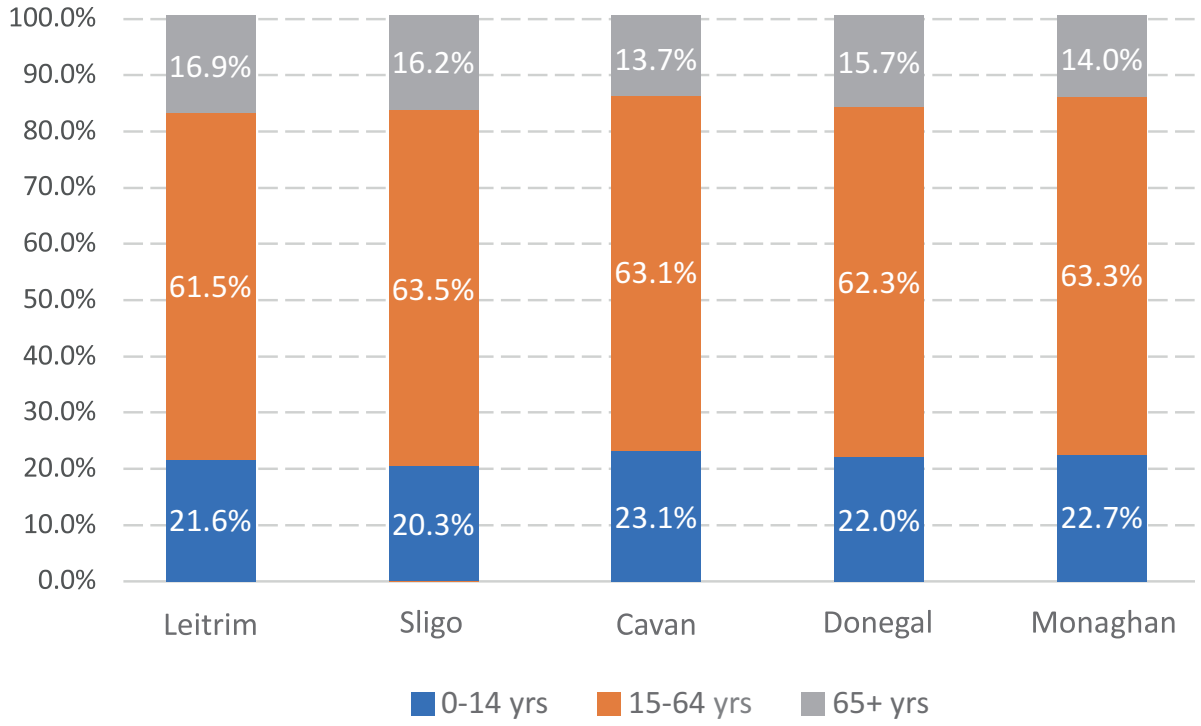
[53] Census 2021 main statistics demography tables – age and sex, NISRA & CSO Population Estimates April 2022 (Persons in April) by Age Group, Sex and Year.

[54] The age profile for Co. Louth has been calculated by applying the age profile for the Mid-East Region (2022 estimates) to the preliminary population estimate for Louth from the 2022 Census.

Similar to the data for 2020 included in last year's report for the EURES Cross Border Partnership, Chart 5 shows that in 2021 Fermanagh & Omagh had a slightly higher percentage of those aged 65 and over than the overall figure for Northern Ireland (18.4% compared to 17.2%). This is also the case for the Border Regional Authority area in 2022 in relation to the overall percentage for the Republic of Ireland (16.9% compared to 15.1%). Comparing these figures with last year's data also shows an increase in the 65+ population in Fermanagh and Omagh, which grew from 17.5% in 2020 to 18.4% in 2021. This is the biggest increase of all the areas presented. The overall figure for those aged 65 and over in both jurisdictions has shown an increase, rising to 17.2% (2021) from 16.9% (2020) in Northern Ireland, and to 15.1% (2022) from 14.8% (2021) in the Republic of Ireland.

However, in order to gain a more detailed understanding of this feature of the population of the Border Regional Authority area, Chart 6 shows the age profiles for its constituent counties according to the 2016 Census.

Chart 6: Age profiles of the Border Regional Authority Area, % (2016)[55]



According to the 2016 Census, all counties within the Border Regional Authority area had higher percentages of persons aged 65 or over than the overall figure for the Republic of Ireland, which in 2016 stood at 13.4%, and higher proportions of 0–14-year-olds than was the case for the Republic of Ireland as a whole (19.6%). [56] When looking at the age profile of the overall population of the island of Ireland in 2021/22[57], the Northern Ireland-Ireland border region has higher percentages of younger people relative to the overall population of the island of Ireland (19.5%), while only Cavan and Monaghan have a lower percentage of older people aged 65+. The overall island of Ireland has an estimated 64.9% aged between 15 and 64 years of age, which is higher than all the border region areas.

55 CSO, Population 2011 to 2016 (E2022).

56 CSO, Census of Population 2016 - Profile 3 An Age Profile of Ireland.

57 Based on Northern Ireland Census 2021 data and RoI, Census 2022 Data

Educational attainment in the Northern Ireland-Ireland border region continues to underperform in relation to general levels of attainment. This deficit can be seen in Table 4 below,[58] where a lower percentage of those aged between 16 and 64 in local government districts in Northern Ireland abutting the border had achieved an NVQ Level 4 or above than the overall percentage for Northern Ireland in 2021 (42.1%). Of further concern is, with the exception of Mid Ulster (11.7%), the LGDs abutting the border registered a higher percentage of those aged between 16 and 64 with No Qualifications compared to the national average (11.9%).

Table 4: Level of qualifications attained by % 16 to 64 years olds in 5 NI LGDs (2021)

	NVQ Level 4 or above	Achieved below NVQ level 4	No Qualifications
Northern Ireland	42.1	45.9	11.9
Armagh, Banbridge & Craigavon	39.6	47.4	13.0
Derry City & Strabane	37.3	47.6	15.1
Fermanagh & Omagh	40.5	45.0	14.5
Mid Ulster	31.7	56.7	11.7
Newry, Mourne & Down	37.2	50.0	12.9

Similarly, in Quarter 2 of 2022, 6% of those aged 25 to 64 in the Border Regional Authority area had only attained primary education (a 1% decrease from Q2 2020), compared with 3% of the total population (a 1% decrease from Q2 2020); while in Quarter 2 of 2022 53% of the total population in the Republic of Ireland had achieved a Higher Cert or above (a 2% increase on Q2 2020), only 48% had achieved this in the Border Regional Authority area (this represents a 7% increase on Q2 2020).[59] It can be seen below how this compares with more historical data.

The 2016 Census results allow us in Table 5 to look at the percentage of those aged 15 years and above in the constituent counties of the Border Regional Authority Area and Co. Louth with third level qualifications, as well as those with no formal or only primary education.[60]

Table 5: % of those aged 15 and over with 3rd level education, or no formal or only primary education (2016)

	3rd Level	No formal or only primary
Republic of Ireland	42	13.3
Donegal	33.4	21.9
Leitrim	37.7	15.7
Sligo	40.7	14.2
Cavan	33.5	17.8
Monaghan	32.9	18
Louth	36.6	15.8

58 NISRA, Labour Force Survey Tables for Local Government Districts 2009-2021 (November 2022).

59 CSO, "Persons Aged 25-64 by Region, Sex, Education Level and Quarter".

60 CSO, "Census of Population 2016 – Profile 10 Education, Skills and the Irish Language/Level of Education".

All of the counties included in the above table registered lower percentages of those with a third level education, and higher percentages of those who had no formal or only primary education than the equivalent figures for the Republic of Ireland as a whole in 2016.

In terms of the nature of the labour market in the Northern Ireland-Ireland border region, given the differences in which data is gathered in the two jurisdictions, it is necessary to look at how the geographical areas on either side of the border fare in comparison to their respective jurisdictions, beginning with the employment rate of those aged 16 to 64 in Northern Ireland in 2021. Highlighting those abutting the border, Table 6 displays the (2021) ranking of all eleven Local Government Districts in Northern Ireland, from highest to lowest employment rates, with the overall Northern Ireland employment rate included in the rankings.[61]

Table 6: Employment rate of 16-64 year olds in Northern Ireland by LGD (2021)

	2020	2021	Change
Lisburn and Castlereagh	78.6%	75.2%	-3.4%
Antrim and Newtownabbey	73.1%	74.3%	1.2%
Ards and North Down	70.8%	73.2%	2.4%
Fermanagh and Omagh	**66.7%**	**72.1%**	**5.4%**
Armagh City, Banbridge and Craigavon	**71.3%**	**70.9%**	**-0.4%**
Mid and East Antrim	71.7%	71.7%	-1.4%
Mid Ulster	**73.8%**	**70.3%**	**-3.5%**
Northern Ireland	**69.8%**	**70.2%**	**0.4%**
Causeway Coast and Glens	66.3%	68.8%	2.5%
Newry, Mourne and Down	**73.7%**	**68.5%**	**-5.2%**
Belfast	65.6%	66.9%	1.3%
Derry City and Strabane	**60.8%**	**65.4%**	**4.6%**

The focus in Table 6 remains on the data for the five Local Government District within the Northern Ireland-Ireland border region.[62] Three of these districts displayed employment rates above the Northern Ireland average of 70.2%, while the remaining two, Newry, Mourne and Down (68.5%) and Derry & Strabane (65.4%) fell below. Of note is that while Derry & Strabane saw an increase of 4.6 percentage points between 2020 and 2021, it is still lower than the 68% recorded in 2019.

The International Labour Organisation (ILO) defines unemployed as "those aged 16 and over without a job who were able to start work in the two weeks following their LFS interview and had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained".[63] An estimated 24,000 people (aged 16-64) in Northern Ireland were unemployed for the period September-November 2022,[64] giving an unemployment rate of 2.8%.

61 NISRA, Labour Force Survey Tables for Local Government Districts 2009-2021 .

62 NISRA, Labour Force Survey Tables for Local Government Districts 2009-2021.

63 Northern Ireland Labour Market Report (nisra.gov.uk)

64 NISRA, Labour Market Report - Headline tables, January 2023.

In December 2022, the total number of claimants in Northern Ireland stood at 36,345, which represents 3.1% of the Northern Ireland workforce (aged 16-64).[65] Derry & Strabane and Belfast both stand out at a local level in terms of the statistics relating to the claimant count.[66] Table 7 shows the proportion of residents aged 16 to 64 claiming unemployment-related benefits in December 2022, ranking all eleven local government district areas from the highest to the lowest, and including the overall figure for Northern Ireland.

Table 7: Claimant Count as proportion of resident population aged 16-64 (December 2021 & 2022)

	Dec-21	Dec-22	% Change
Derry City and Strabane	5.2	4.8	-0.4
Belfast	4.7	4.1	-0.6
Causeway Coast and Glens	3.4	3.1	-0.3
Northern Ireland	3.4	3.1	-0.3
Mid and East Antrim	2.5	3	0.5
Newry, Mourne and Down	3.3	2.9	-0.4
Ards and North Down	3.1	2.7	-0.4
Armagh City, Banbridge and Craigavon	2.8	2.7	-0.1
Antrim and Newtownabbey	2.8	2.4	-0.4
Fermanagh and Omagh	2.7	2.4	-0.3
Mid Ulster	3.4	2.3	-1.1
Lisburn and Castlereagh	2.3	1.9	-0.4

As can be seen in Table 7 above,[67] there has been a fall in the proportion of the Northern Ireland population aged 16 to 64 claiming unemployment-related benefits over the course of the last year. The working age claimant count for Northern Ireland has fallen from 3.4% in December 2021 to 3.1% in December 2022. The Derry and Strabane claimant count has fallen from 5.2% in December 2021 to 4.8% in December 2022 but remains the highest percentage of any Local Government District.

Both Derry & Strabane and Belfast are above the overall percentage of claimants for Northern Ireland, while Causeway Coast and Glens is the same as the Northern Ireland average in December 2022. All areas, except Mid & East Antrim registered a decrease in the claimant count between December 2021 and December 2022. In Mid & East Antrim, the working age claimant count rate increased by 0.5 percentage points in the year to December 2022.

Table 8 sets out the ILO participation rate of those aged 15 years and over in all NUTS 3 regions in the Republic of Ireland in Quarter 3 of 2021 and 2022, and the overall national rate, ranking them from highest to lowest.[68]

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65 The claimant count 'consists of all people claiming Jobseeker's Allowance (JSA) plus those Universal Credit (UC) claimants who were claiming principally for the reason of being unemployed. Some claimants are wholly unemployed and seeking work, while others may be employed but with low earnings that make them eligible for unemployment related benefit support' (Northern Ireland Labour Market Report).

66 NISRA Claimant count tables (December 2022).

67 NISRA, "Claimant Count Monthly Data".

68 CSO, "Labour Force Quarterly Series/QLF08/Persons aged 15 years and over by Region, Quarter and Statistic" (QLF08).

Table 8: ILO Participation Rate by NUT 3 region in the Republic of Ireland % (Q3 2021 & 2022)

	Q3 2021	Q3 2022	% Change
Dublin	68.2	68.1	-0.1
Mid-East	66.3	65.5	-0.8
Republic of Ireland	**65.1**	**64.8**	**-0.3**
Midland	63.4	64.3	0.9
South-West	65.1	63.7	-1.4
West	63.8	63.4	-0.4
Border	62	62	0
Mid-West	62.8	61.9	-0.9
South-East	60.2	61.8	1.6

The South-East records the lowest ILO Participation rate (61.8%) for Quarter 3 of 2022. While it has increased by 1.6% since Q3 2021, it continues to fall below the national participation rate of 64.8%, which has fallen slightly in the period since Q3 2021. Apart from the South-East, the Midland is the only other region to experience an increase in the ILO participation rate between Q3 2021 and Q3 2022. The South-West experienced the biggest % decrease falling from 65.1% in Q3 2021 to 63.7% in Q3 2022.

In order to capture the labour market at county level, Table 9 sets out the labour force participation and unemployment rates for Co. Louth and the constituent counties of the Border Regional Authority area, taken from the CSO's 2016 Census (the most recent available data at county level), with the same figures at national level.[69]

Table 9: Labour force participation & unemployment rates of persons aged 15 and over (2016)

	Labour Force Participation Rate	Unemployment Rate
Republic of Ireland	61.4%	12.9%
Donegal	57.3%	18%
Sligo	57.9%	14%
Leitrim	59.3%	14.5%
Cavan	61.3%	15.1%
Monaghan	61.9%	13%
Louth	60.9%	16.7%

All of the counties included in the above table registered higher rates of unemployment in 2016 than the overall national rate, although Co. Monaghan recorded a 0.5% higher labour force participation than Ireland's overall rate, and with Co. Cavan only 0.1% below the national rate. Donegal's high unemployment rate (18%) in 2016 was actually an improvement on the rate recorded in the 2011 Census, where it stood at 26.2%.

Although comparisons of the economies of the two jurisdictions on the island of Ireland are difficult due to the differences in scale, it is nevertheless possible to gain some understanding of

[69] CSO, "Labour Force Participation and Unemployment Rate of Population Aged 15 Years and Over 2011 to 2016 by Sex, County and City, Age Group, Census Year and Statistic".

the levels of productivity and income within the two jurisdictions, and how the Northern Ireland-Ireland border region fares.

Table 10 sets out the Gross Value Added (GVA) produced in each of the 11 local government district areas in 2019 and 2020 (the most recent data available), ranking them from highest value of goods or services produced per person to lowest, and including the overall rate for Northern Ireland.[70] However, it is important to remember that this statistic refers to the value of goods and services produced per person in each location, and therefore those actually producing those goods and services may not be residents of that location and could be commuting there from another place.

Table 10: GVA per head for LGDs in Northern Ireland (2019 & 2020)

Region name	2019	2020
Belfast	40,269	40,148
Mid Ulster	**24,547**	**23,329**
Northern Ireland	23,241	23,035
Antrim and Newtownabbey	23,709	22,979
Lisburn and Castlereagh	23,275	22,912
Derry City and Strabane	**19,879**	**20,708**
Fermanagh and Omagh	**20,004**	**20,496**
Armagh City, Banbridge and Craigavon	**19,057**	**19,076**
Mid and East Antrim	18,005	17,815
Newry, Mourne and Down	**17,926**	**17,546**
Causeway Coast and Glens	15,637	15,591
Ards and North Down	13,795	13,375

As can be seen in Table 10, apart from Mid Ulster (£23,329), in 2020 the LGDs (NUTS 3 areas) which are part of the Northern Ireland-Ireland border region fall below the overall Northern Ireland average for GVA per head (£23,035), with Newry, Mourne & Down the lowest ranked of the Northern Ireland border region (£17,546). As well as being below the Northern Ireland average, Ards & North Down is the lowest of all LGDs (NUTS 3 areas) in the UK, while Causeway Coast & Glens is the sixth lowest. Belfast, as the highest ranked area in Northern Ireland, is above the overall Northern Ireland GVA and is also 19th in the overall UK standings.

In the Republic of Ireland, Dublin (in a similar manner to Belfast) outstripped all other locations in the Republic of Ireland in terms of estimated GVA per head in 2020; with the Republic's overall GVA per head standing at €70,811 in 2020 (increasing by 4.6% from 2019), Dublin's was €98,741 (an increase of 2% on 2019). Bearing in mind that no figures are available for GVA per head for the Mid-West or South-West,[71] Table 11 shows where the Border Regional Authority area and the Mid-East (which includes Co. Louth) were placed in relation to all other NUTS 3 areas for GVA per head in 2020.[72]

[70] Office for National Statistics, "Regional gross value added (balanced) per head and income components".

[71] The CSO's explanation for the absence of figures for these two areas is "suppressed for reasons of confidentiality". Also note that the data for 2020 is preliminary.

[72] CSO, "Table 9c: GVA per Person at Basic Prices, 2010 to 2020".

Table 11: GVA per head for NUTS 3 areas in the Republic of Ireland, excluding the Mid West and South West (2019 & 2020)

	2019	2020	% Change
Dublin	96,794	98,741	2.0%
Republic of Ireland	67,721	70,811	4.6%
South East	53,576	59,921	11.8%
Mid-East	42,180	42,457	0.7%
West	31,475	32,366	2.8%
Border	22,748	23,419	2.9%
Midland	19,917	21,271	6.8%

While Co. Louth is within an area that performed comparatively well in terms of GVA per head in relation to elsewhere in the Republic of Ireland in 2019 and 2020, it must be appreciated that Dublin punches far and above any other region of the country in terms of GVA. The Border Regional Authority area was only higher than the Midland area in terms of the value of goods or services produced per person. It is, however, important to note that the Border Regional Authority area did record an increase in its GVA of 6.8% between 2019 and 2020. Again, it is also important to recall that elements of the population of the Border Regional Authority Area may be commuting to another area where they will be contributing to that place's GVA.

In order to reach a better understanding of the economic status of the population of the Northern Ireland-Ireland border region, given that some people may be commuting elsewhere to work, it is useful to look at the levels of disposable income in the border region. However, it is important to note that the most recent data available on disposable income relate to 2020, which will not capture the more recent impacts of rising energy and other costs. Table 12 sets out the gross disposable household income (GDHI) per head across the LGDs (NUTS 3 areas) of Northern Ireland in 2019 and 2020, as estimated by the Office of National Statistics.[73]

Table 12: GDHI per head (£) for LGDs in Northern Ireland (2019 & 2020)

Region name	2019	2020
Northern Ireland	17,395	17,301
Belfast	16,757	16,744
Armagh City, Banbridge and Craigavon	**16,741**	**16,666**
Newry, Mourne and Down	**16,812**	**16,657**
Ards and North Down	19,300	19,120
Derry City and Strabane	**15,538**	**15,470**
Mid Ulster	**17,315**	**17,154**
Causeway Coast and Glens	17,264	17,127
Antrim and Newtownabbey	18,064	18,102
Lisburn and Castlereagh	19,902	19,795
Mid and East Antrim	18,220	18,022
Fermanagh and Omagh	**16,480**	**16,395**

[73] ONS, "Regional gross disposable household income: all NUTS level regions 1997-2020".

There are two striking features from the above table. One is that Belfast, despite being the LGD (NUTS 3 area) that saw by far the highest value of goods and services being produced per person in 2020 in all of Northern Ireland (and even ranking among the top 20 in all of the UK), it is also an area where the disposable income of its population (£16,744) is lower per head than that of the overall figure for Northern Ireland (£17,301). The second is that all of Northern Ireland's LGDs (NUTS 3 areas) within the Northern Ireland-Ireland border region have households with lower gross disposable income per head than the Northern Ireland average. Mid Ulster is the highest with £17,154 per person, while Derry City and Strabane is the lowest with £15,470. These are continuing features, identified in reports previously undertaken for the EURES Cross Border Partnership.

The levels of estimated disposable income per head across the Republic of Ireland's NUTS 3 areas in 2019 and 2020 are shown in Table 13.[74]

Table 13: Disposable income per person for NUTS 3 areas in the Republic of Ireland (2019 & 2020)

	2019	2020
Border	18,524	19,678
West	19,738	20,985
Dublin	25,696	27,913
Mid East	21,914	23,486
Midland	17,125	18,378
Mid West	21,972	23,346
South East	20,060	21,352
South West	21,835	23,120
Republic of Ireland	22,032	23,615

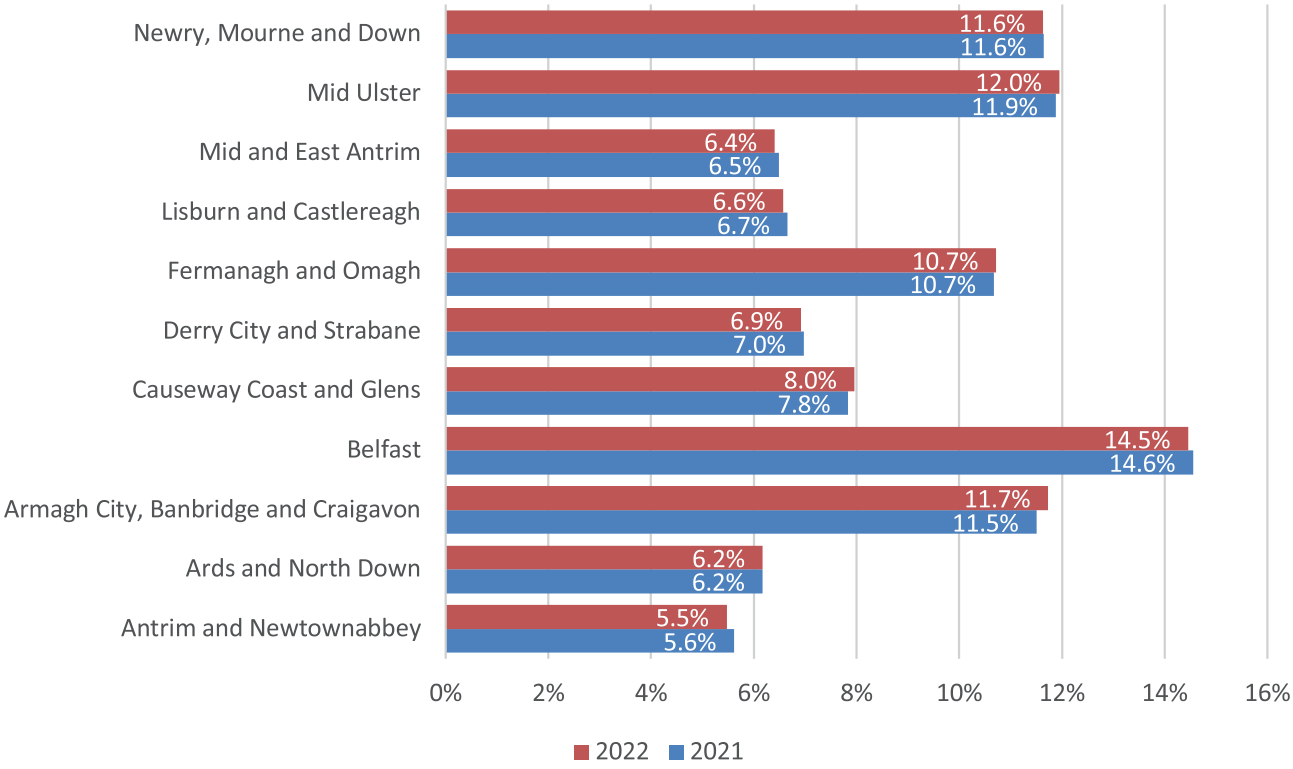
Unlike the case with Belfast in Table 12, which relates to the GDHI for Northern Ireland, Dublin had the highest disposable income per head of all the NUTS 3 areas in the Republic of Ireland in 2020, and as was shown above in Table 11, it also had the highest GVA per head in 2020 (€98,741). Dublin was the only NUTS 3 area in the Republic of Ireland to outperform the national average for disposable income per person (€23,615) in 2020, compared to four areas in 2019 and 2020 in Northern Ireland. While the Mid-East includes Co. Louth, Table 13 shows the Border area as having the second lowest disposable income per person, only marginally above the midland area.

Preliminary estimates at county level show that in 2020 Co. Donegal had the lowest levels of disposable income per person (€18,656) of all Republic of Ireland counties in the Northern Ireland-Ireland border region, with Co. Louth having the highest (€21,739), followed by Co. Sligo (€21,531) and Co. Leitrim (€20,613). In previous reports, Co. Donegal's figures were the main contributor to the low overall figure for the Border Regional Authority area (€19,678), however preliminary estimates for 2020 show that Co. Cavan also has a disposable income below the region's average, albeit only marginally.

[74] CSO, Table 1a: (Preliminary) Estimates of Primary, Total & Disposable Household Income by Region & County in 2020

Opportunities for employment within the Northern Ireland-Ireland border region can begin to be gauged by the number of active businesses located within it, and what percentage this represents of businesses within the respective jurisdictions. In Northern Ireland, for example, there were 78,885 registered businesses in 2022, an increase of 1,245 active businesses from 2021 (77,640). Continuing on a strong showing in 2021, the LGDs (NUTS 3 areas) abutting the border held a significant share of businesses in 2022, as shown in Chart 7.[75]

Chart 7: % of VAT/PAYE registered businesses by LGD (NUTS 3 area) in Northern Ireland (2021 & 2022)



Belfast has the highest percentage of registered businesses in Northern Ireland in 2022 with 14.5% (11,405) of active businesses in Northern Ireland located in the area. Repeating a pattern noted in previous reports, the five LGDs (NUTS 3 areas) in the Northern Ireland-Ireland border region account for a total of 53% of active businesses in Northern Ireland, with the largest single area, Mid Ulster, accounting for 12% or 9,430 businesses. Of the five LGDs (NUTS 3 areas), Armagh City, Banbridge and Craigavon registered the largest increase in the number of businesses with an increase of 325 businesses (3.6%) between 2021 and 2022. As can be seen in Chart 8 below, Northern Ireland has a more evenly spread share of businesses across its LGDs (NUTS 3 areas) when compared to the Republic of Ireland.

Figures for 2020 show that there were 278,862 active enterprises in the Republic of Ireland, an increase of 6,331 on 2019 (272,531). Chart 8 below sets out how they were dispersed across the NUTS 3 areas.[76] However, it is important to note that whilst enterprises in the food products, beverages and tobacco sector are included in the CSO estimates, agricultural businesses (farms)

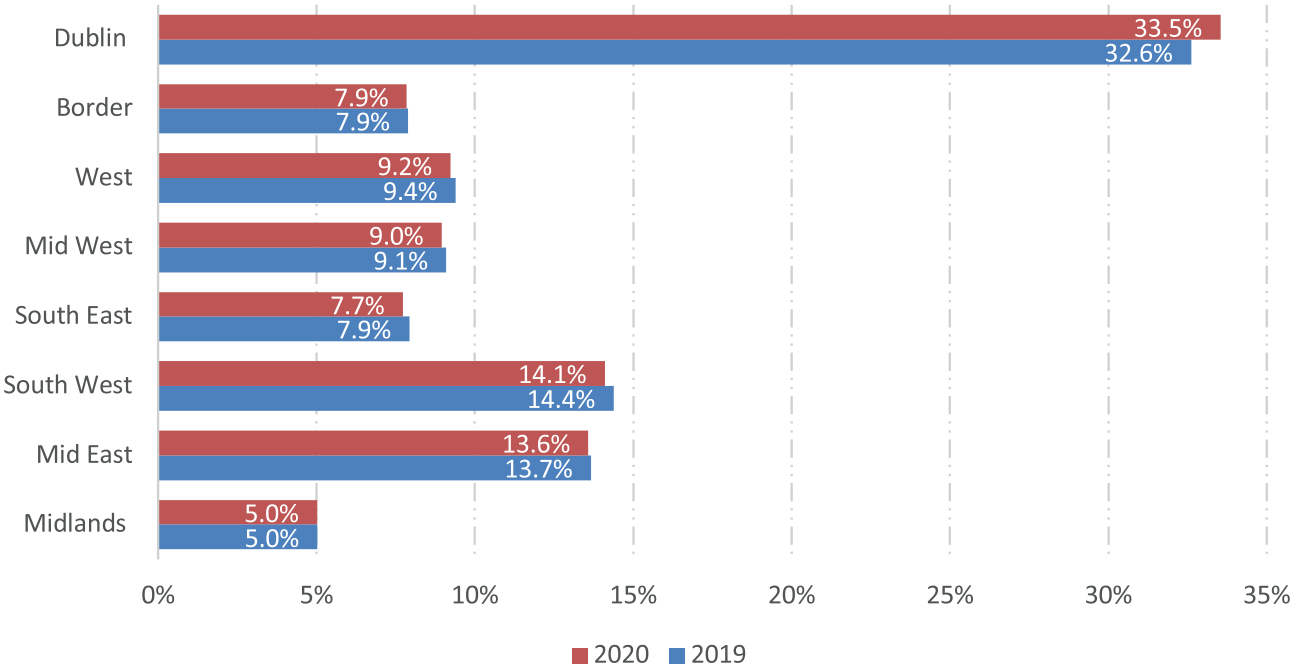
[75] Calculated on the basis of data in "Table 3.1: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area, 2013-2022", in NISRA, "Edition 24 – Facts and Figures from the IDBR"

[76] Calculated from data in CSO, "Business Demography NACE Rev 2 by Employment Size, County, Year and Statistic" (BRA08).

are not. Ireland's Agriculture and Food Development Authority, Teagasc, states "The Census of Agriculture 2016 showed there were 137,500 farms compared to 139, 860 farms in the 2010 Census of Agriculture".[77]

While in Northern Ireland Belfast may hold the largest percentage of active businesses (as per Chart 7), it is only 2.5% ahead of its nearest rival, Mid Ulster. The landscape is somewhat different in the Republic of Ireland, as is shown in Chart 8. Dublin contained 33.5%, or 91,556, of businesses in 2020 (up from 32.6% and 83,467 businesses in 2019), and the capital continues to outstrip all other NUTS 3 areas in the Republic of Ireland by some distance. In second place came the South-West, which was home to 14.1% of businesses in 2020. The Mid-East, including Co. Louth, accounts for the third largest share (13.6%), with the Border Regional Authority area having one of the lowest shares (7.9%). However, when examining the figures at county level, it is worth noting that Co. Donegal has a larger representation of active enterprises than all other Irish counties within the Northern Ireland-Ireland border region. Indeed, the county is home to 39% of all businesses in the Republic of Ireland Border area.

Chart 8: % of active enterprises by NUTS 3 area in the Republic of Ireland (2019 & 2020)

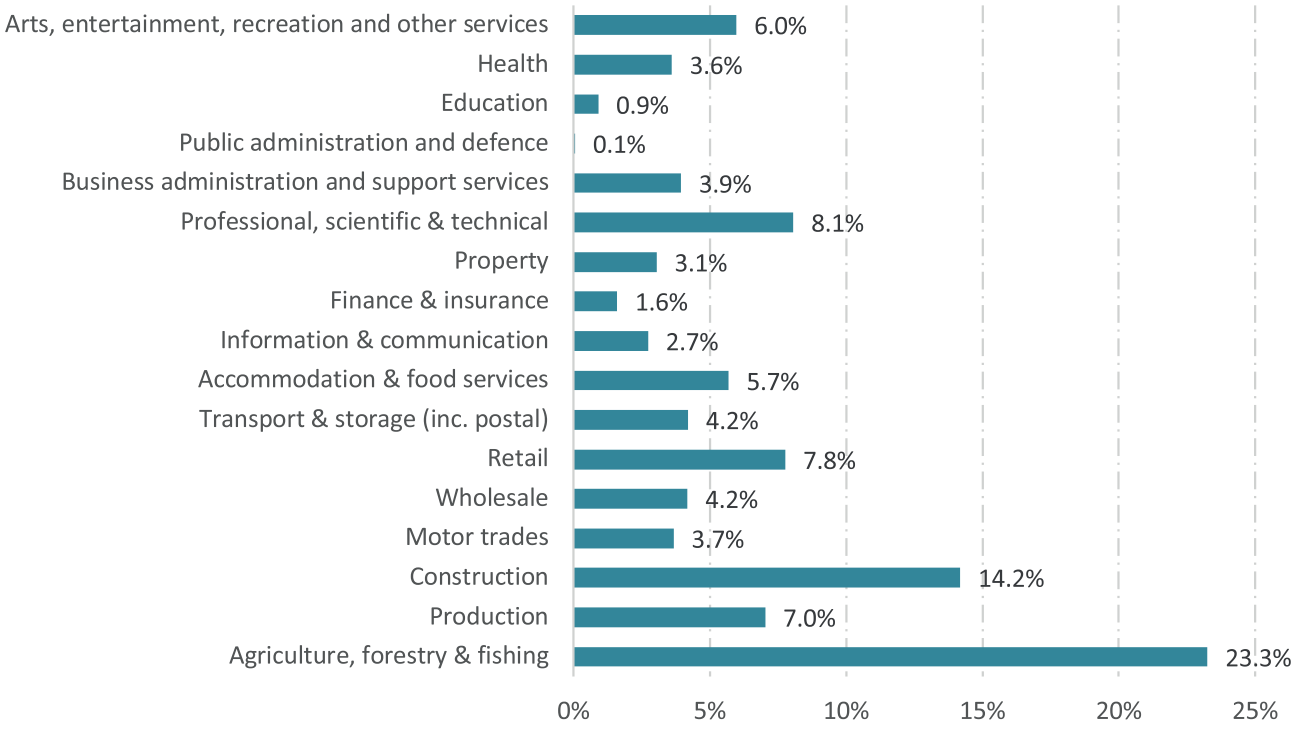


Bearing in mind important underlying differences in how the CSO and NISRA estimate the numbers of businesses in their respective jurisdictions, in 2020 (the earliest year for which the relevant data is available for both jurisdictions) there were 68,276 businesses in the Northern Ireland-Ireland border region (40,120 in the five LGDs on the Northern Ireland side of the border, and 28,156 in the Border Regional Authority area and Co. Louth on the other side). This meant a small increase in the number of businesses on the Northern Ireland side from 2019 (when there were 39,970 businesses), and a much bigger increase on the Republic of Ireland side (which had 26,636 businesses in 2019). From these statistics, therefore, 19.2% of businesses on the island of Ireland in 2020 were located in the Northern Ireland-Ireland border region.

[77] Teagasc, "Agriculture in Ireland".

The nature of the businesses active in the Northern Ireland-Ireland border region needs to be understood within the overall business landscape in the two jurisdictions. Chart 9, therefore, sets out the weight of a range of business activities in Northern Ireland as a percentage of all businesses registered in 2022 (78,885).[78]

Chart 9: % of businesses in Northern Ireland by Broad Industry Group (2022)



Agriculture, forestry and fishing businesses continue to dominate the business landscape in Northern Ireland, representing 23.3% of all businesses, with construction maintaining a significant presence at 14.2%, followed by professional, scientific and technical enterprises (8.1%). Retail is the next largest share of businesses with 7.8%. However, while there may be many agriculture businesses in Northern Ireland, the Northern Ireland Skills Barometer 2021 notes that agriculture (along with retail and construction) is one of the sectors that has 'experienced the largest fall in their share of employment', and that 'the sectors which have increased their share of employment the most over the past 20 years are health and private services'.[79] The business landscape within the five LGDs (NUTS 3 areas) in Northern Ireland abutting the border shows some significant differences, with Fermanagh & Omagh being a notable example.

The agriculture, forestry and fishing sector represented 44.4% of all businesses in Fermanagh & Omagh in 2022 (slightly down from 2021, when it represented 44.8%). To put this in context, the proportion of businesses in Agriculture, forestry and fishing across all areas in Northern Ireland is 23.3%. Every other sector in Fermanagh & Omagh is below the Northern Ireland average: production makes up 5.9% of business in Fermanagh & Omagh against an average of 7.0%,

[78] NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2022", in "Edition 24 – Facts and Figures from the IDBR".

[79] See Ulster University Economic Policy Centre, "Northern Ireland Skills Barometer 2021 – Overview report" (March 2022), p.20.

wholesale is 0.9% below the average, retail 1.7% below, accommodation and food services is 2.4% below, information and communication 2.0% below, and arts, entertainment and recreation is 2.3% below. But the sector that is most significantly underrepresented in Fermanagh & Omagh is professional, scientific and technical, where the area is 3.9% below the average figure for Northern Ireland. This difference is down by 0.1 points on 2021 where the sector in Fermanagh was 4 % below the national average. This, however, is a common feature across all five of the LGDs (NUTS 3 areas) where this sector has a lower presence, although Fermanagh & Omagh shows the greatest discrepancy.[80]

Of the five border areas, Mid Ulster has the second highest representation of agriculture, forestry and fishing, at 34.5% of all businesses in the area in 2022. It also has a more significant presence of production (9.4 percentage points against an NI average of 7 percentage points), and construction (17.3% against an average of 14.2%) businesses than is the case for the Northern Ireland average, but a lower representation of businesses in retail (6.2% against 7.8%), accommodation and food services (2.4% lower than the average), information and communication (1.8% lower), arts, entertainment and recreation (2.6% lower), and professional, scientific and technical (2.7% lower).[81]

Agriculture, forestry and fishing is also an important business sector in Newry, Mourne & Down (25.6% of all businesses and 2.4% above the average), but the representation of the construction sector is proportionally more significant (18.7%) compared to the Northern Ireland average of 14.2%. The sector most underrepresented in Newry, Mourne & Down is professional, scientific and technical, which is 1.6% below the overall average for Northern Ireland, with all other sectors within 1 percentage point of the Northern Ireland average.[82]

In Armagh, Banbridge & Craigavon, meanwhile, while agriculture, forestry and fishing represented 26.0% of all businesses in the area in 2022, a number of other sectors were more strongly represented than was the case for the Northern Ireland average. These included production (7.6% compared to an average of 7.0%), motor trades (4.2% to an average of 3.7%), wholesale (4.7%), retail (8.5%), and transport and storage (6.1%). Of those sectors where representation was significantly below the overall figure for Northern Ireland, Information and communication (1.6%), and professional, scientific and technical (6.3%) saw the greatest differences (1.1% and 1.8% lower respectively).

The presence of Agriculture, forestry and fishing in Derry & Strabane was just below the Northern Ireland average in 2022, at 23.1%. Motor trades (3.8%), accommodation and food services (6.1%), and arts, entertainment and recreation (6.5%) and Health (4.1%) all featured more prominently in Derry & Strabane than the average across Northern Ireland. But construction (16.3%) had the greatest comparative presence in relation to the Northern Ireland average. Of the sectors less well represented in Derry & Strabane than is the case in Northern Ireland as a whole, the professional, scientific and technical registered the greatest discrepancy, at 1.1 pps below the equivalent figure for Northern Ireland (7% compared to 8.1%).

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80 NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2022", in "Edition 24 – Facts and Figures from the IDBR".

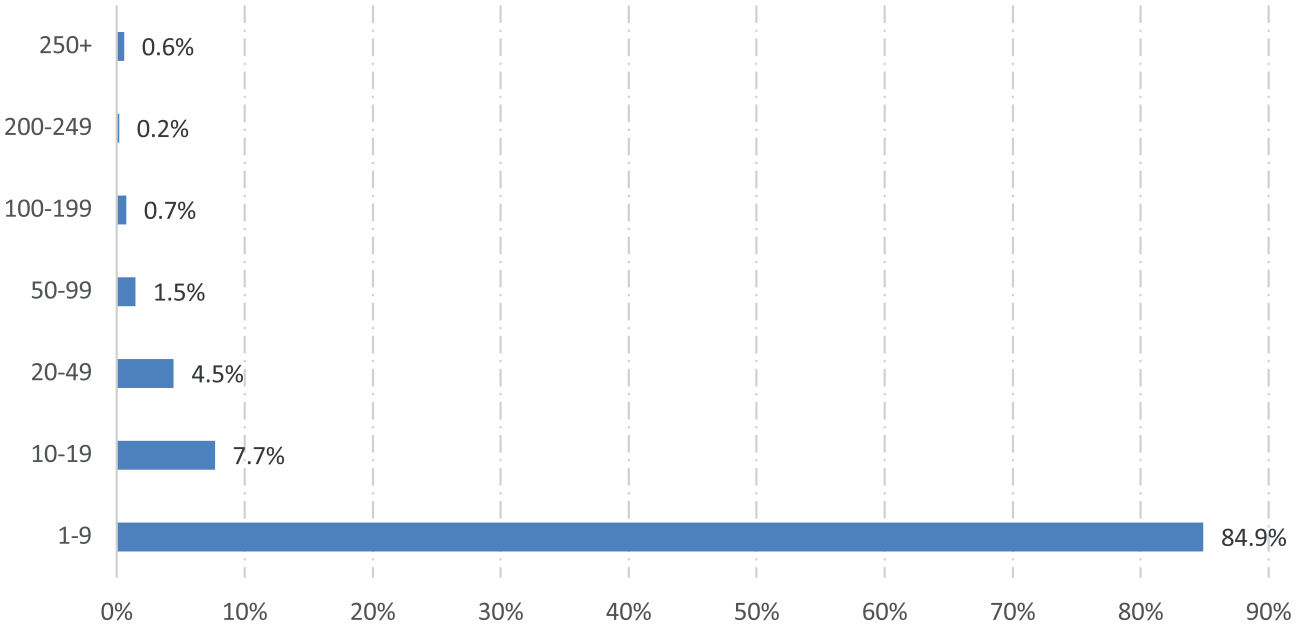
81 Ibid.

82 NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2022", in "Edition 24 – Facts and Figures from the IDBR".

In 2022, therefore, 71.0% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five LGDs (NUTS 3 areas) adjoining the border (no change from 2021), which also contained 60.1% of all construction businesses, 50.1% of all transport and storage businesses, 55.6% of all production businesses, and 49.1% of all retail businesses. In contrast, the same areas only contained 27.1% of all information and communication businesses, 35.4% of all finance and insurance businesses, and 37.9% of all professional, scientific and technical businesses.

Smaller enterprises employing less than ten people predominate in Northern Ireland, with only 320 companies having more than 250 employees (down from 335 in 2021), which accounts for 0.6% of businesses with one or more employees, as can be seen in Chart 10.[83]

Chart 10: % of VAT and/or PAYE registered businesses in Northern Ireland by employee size band (2022)



Businesses employing less than ten people have a higher presence in all five of the Northern Ireland Local Government Districts classified as border regions than the 84.9% Northern Ireland average (which was 84.6% in 2021). Fermanagh & Omagh had the highest representation of such businesses (88.9%). However, while smaller businesses also dominate in Derry & Strabane, it has higher percentages of businesses employing 10 to 19 people (7.8%) than is the Northern Ireland average (7.7%).

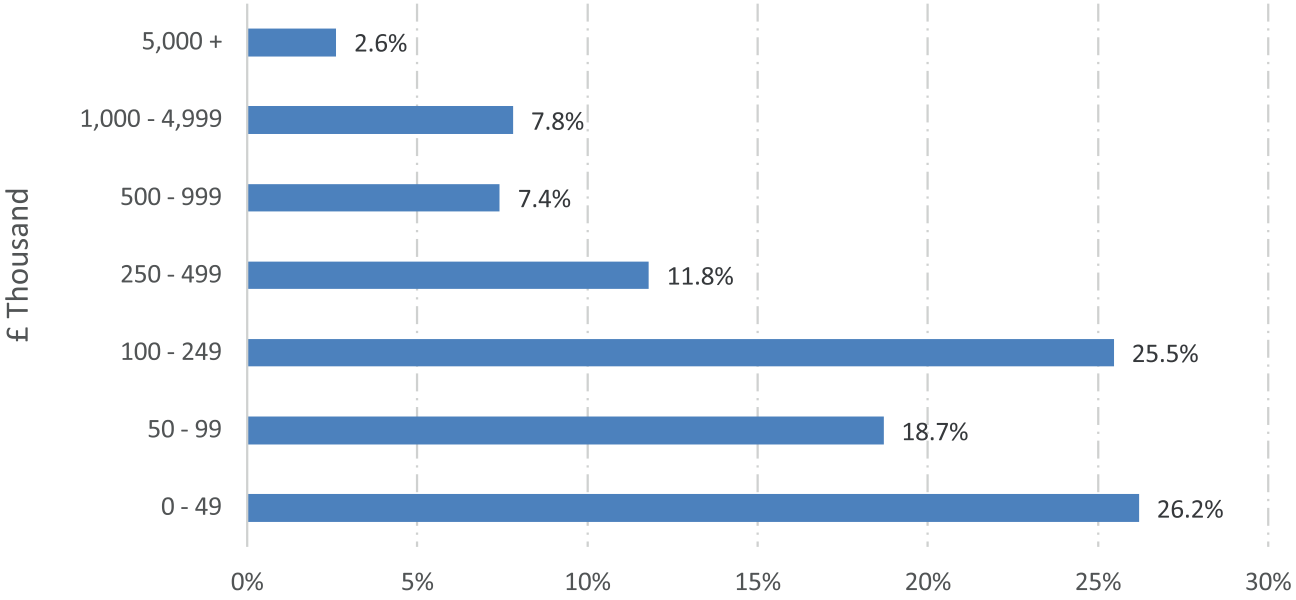
As can be seen in Chart 11,[84] the majority of businesses in Northern Ireland had a turnover of less than £250,000 in 2022, with only 2.6% registering a turnover of £5million or more, which is slightly lower than the 2.8% in 2021. As in many other aspects, however, Belfast diverges substantially from the pattern elsewhere, having a much lower percentage of businesses with a turnover of

[83] Calculated from NISRA estimates in "Table 3.4: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Employee Size Band, 2022", "Edition 24 – Facts and Figures from the IDBR". It is important to note that the calculations used her have discounted holding companies and registered companies not yet trading, which account for 23,410 of all registered businesses. This means the calculations are based on a total of 55,470 businesses with one or more employees.

[84] NISRA, "Table 3.3: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Turnover Size Band, 2022", "Edition 24 – Facts and Figures from the IDBR".

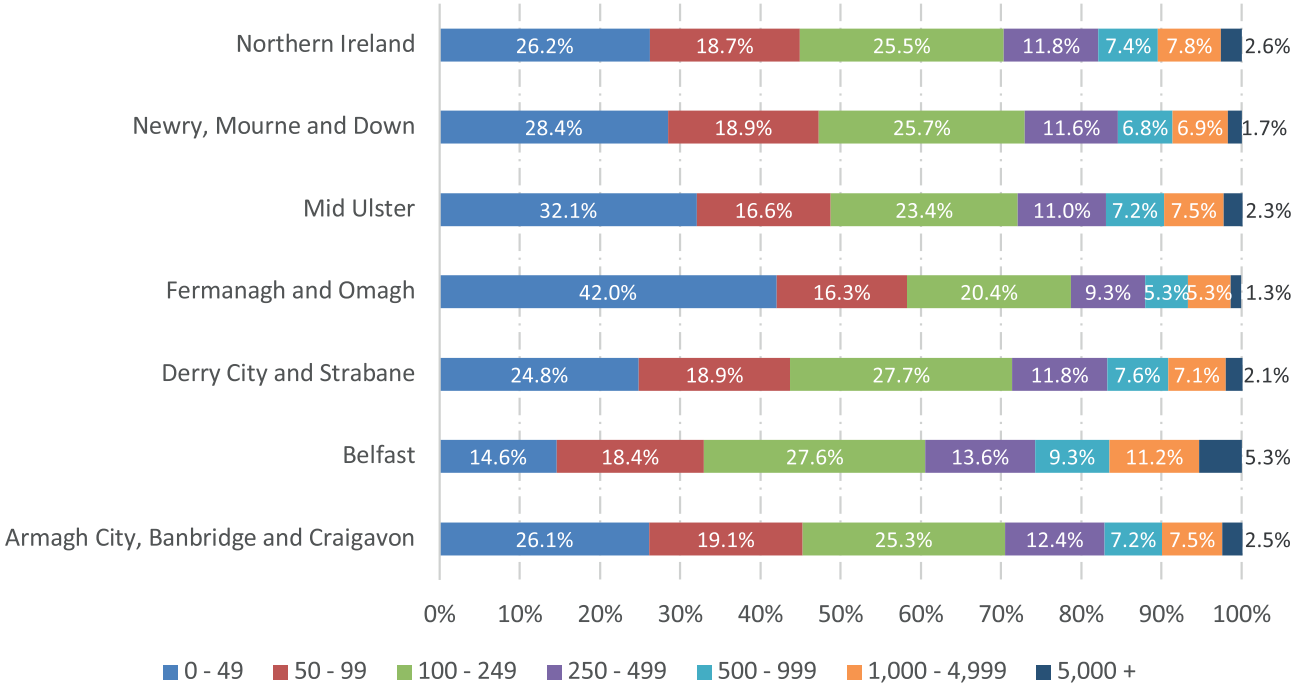
£49,000 or lower (14.6%, although this represents an increase from 12.1% in 2021), and a much higher percentage of those with a turnover of £5 million or more (5.3%, which has fallen slightly from 5.8% in 2021).

Chart 11: % of registered businesses in Northern Ireland by turnover size band (2022)



Figures from the IDBR show that 82.2% of Northern Ireland businesses have a turnover of less than £500,000 per year, with just over a quarter (26.2%) turning over less than £50,000. This pattern is felt somewhat more acutely in most of the LGDs (NUTS 3 areas) adjoining the border, with 42.0% of businesses in Fermanagh & Omagh having a turnover of less than £50,000 in 2022, and only 1.3% with a turnover of £5 million or more, as shown in Chart 12.

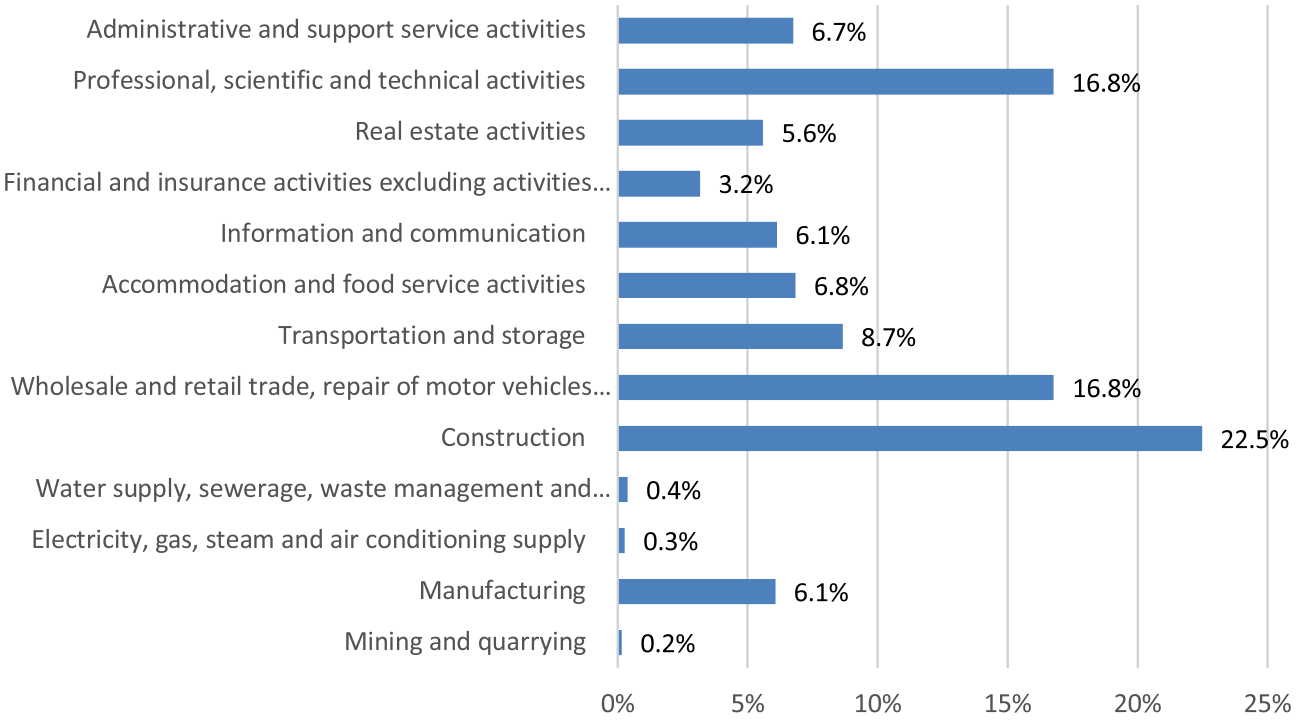
Chart 12: % of registered businesses by turnover size band, £ thousands (2022)



Newry, Mourne & Down and Derry & Strabane both continue to distinguish themselves from the other LGDs in the Northern Ireland-Ireland border region. As was the case in the previous year, in 2022 they had a higher percentage of businesses in the £100,000 to £249,000 band than the Northern Ireland average. Newry, Mourne & Down and Derry and Strabane were also above the Northern Ireland average in the £50,000 to £99,000 bracket, as was Armagh, Banbridge, and Craigavon which was also above the Northern Ireland average in the £250,000 to £499,000 bracket. Derry & Strabane, at 7.6% were above the Northern Ireland average in the £500,000 to £999,000 cohort. All five LGDs in Northern Ireland which abut the Northern Ireland/Ireland border fell below the overall Northern Ireland level for £5,000,000+ turnover of 2.6%, with Armagh Banbridge & Craigavon the area the closest to the overall average at 2.5%.

Given the different methodologies employed by the CSO and NISRA in categorising business activity in their respective jurisdictions, particularly in terms of how agricultural activity is accounted for separately in the Republic of Ireland, straightforward comparisons of the business landscapes on either side of the Northern Ireland-Ireland border cannot be made. However, Chart 13 sets out the percentages of businesses involved in a range of activities in the Republic of Ireland in 2020, with the total number of businesses (excluding the activities of holding companies) at 278,862.[85]

Chart 13: % of active enterprises in the Republic of Ireland by activity (2020)



It can be seen how construction (22.5%), wholesale and retail (16.8%), and professional, scientific and technical (16.8%) represent significant areas of business activity in the Republic of Ireland. This pattern is replicated across almost all of the Irish counties within the Northern Ireland-Ireland border region, with construction having a proportionally greater presence here (representing 30.3% of businesses in Co. Cavan in 2020, and even in Co. Louth, which has the lowest proportion of Construction of the border counties has 23.1%, still above the national average). The wholesale

[85] CSO, "Table 1: Active Enterprises (Number) by Activity and Year". – note this analysis excludes the activities of holding companies

and retail trade was most strongly represented in Co. Monaghan (22.6% of all businesses in 2020), and had a weaker presence in Co. Sligo (17.9%). Co. Donegal differed from other counties in that businesses in the accommodation and food service sector were more strongly represented than those in the professional, scientific and technical sector, with accommodation accounting for 11.3% in Donegal against 9.6% for professional sector businesses. Of the Irish counties on the Northern Ireland-Ireland border, the professional, scientific and technical sector was the third most represented sector in all except Donegal and Monaghan. In Donegal, construction was the largest sector accounting for 30.2%, followed by wholesale at 19.3% and accommodation and food services at 11.3%. Professional, scientific and technical was ranked 4th accounting for 9.6% of businesses in Donegal county. Monaghan had highest activity in construction at 29.5%, wholesale at 23.6% and manufacturing at 10.3%, with other service activities ranked 4th, with 9.4% of business in the county in that sector.

As noted earlier, agriculture is not included in the CSO data that has been referred to. However, it is noteworthy that 20.6% (approximately 28,400) of all Ireland's farm holdings in 2016 were located in the Border Regional Authority Area.[86]

As can be seen in Table 14,[87] the predominance of businesses employing ten people or less in the Republic of Ireland in 2020 (92.4%) appears to be even stronger than in Northern Ireland, where in 2021 they accounted for 84.9% of all businesses.

Table 14: % of Republic of Ireland enterprises by employment size (2020)

	Under 10 employees	10 to 19	20 to 49	50 to 249	250+
Republic of Ireland	92.4%	3.9%	2.3%	1.2%	0.2%
Cavan	92.6%	4.0%	2.2%	1.1%	0.1%
Donegal	92.3%	4.6%	2.2%	0.8%	0.1%
Leitrim	94.7%	3.1%	1.8%	0.0%	0.0%
Louth	91.6%	4.7%	2.4%	1.1%	0.2%
Monaghan	90.8%	5.3%	2.5%	0.0%	0.0%
Sligo	92.9%	3.7%	2.4%	0.0%	0.1%

The Irish border counties' business demography in terms of the size of its businesses is broadly in line with that of the Republic of Ireland on average, with the vast majority of businesses in Ireland's border counties employing less than ten people. However, Leitrim (94.7%), Sligo (92.9%) and Cavan (92.6%), have higher levels of businesses with under 10 employees than the overall national level (92.4%).

Returning to Northern Ireland, Chart 14 details the percentage of employee jobs in Northern Ireland by broad sector according to NISRA's Quarterly Employment Survey for Q3 of 2022.[88] As the Chart shows, of the 802,950 total employee jobs in Q3 of 2022, the majority were in services, totaling 654,410 or 81.5% (an increase of 0.2% in the number of total employee jobs from Q3 of

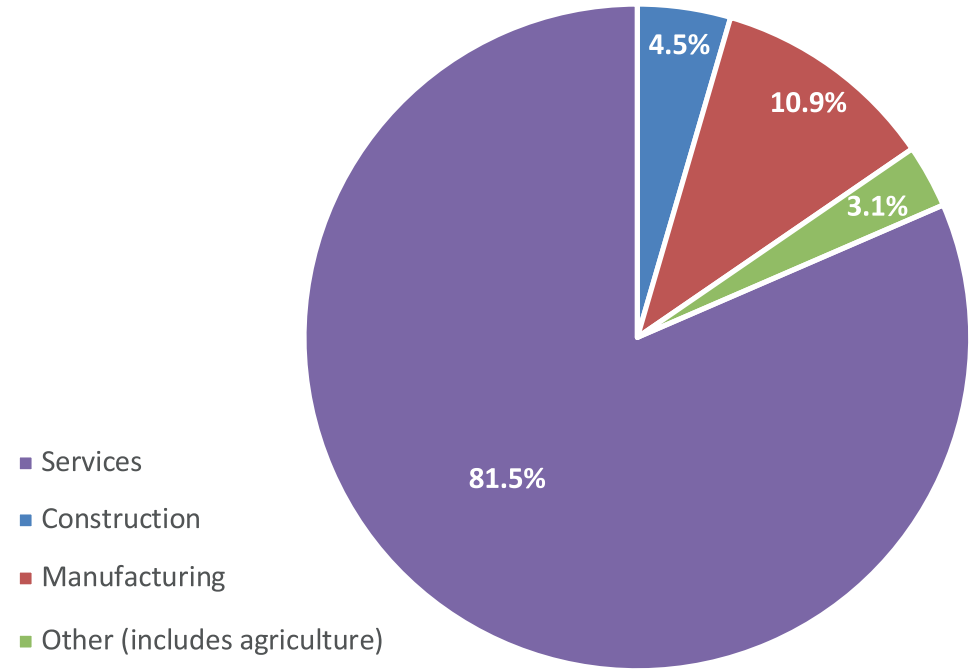
86 CSO, "Table 2.1: Number of Farms by Farm Size (AAU) and Region 2016".

87 CSO, "BRA08: Business Demography NACE Rev 2 by Employment Size, County, Year and Statistic", (1 October 2021).

88 NISRA, "Northern Ireland Quarterly Employment Survey" (13 December 2022). Please note, these are provisional estimates and may be revised in the next QES publication.

2021). Manufacturing occupied the second largest share with 10.9% (87,640) for Q3 2022, representing a 0.3% decrease in total manufacturing employee jobs from Q3 2021. The construction sector accounted for 4.5% (36,260) of total employee jobs in Q3 2022, while the "other" category (which includes agriculture) accounted for 3.1% (24,640).

Chart 14: % of employee jobs in Northern Ireland by broad sector (Q3 2022)



However, there are some significant differences in terms of the sectoral distribution of employment in the five of Northern Ireland's LGDs within the Northern Ireland-Ireland border region, particularly in relation to the relative importance of the services sector.[89]

Table 15: % of employee jobs by broad sector in LGDs in Northern Ireland 2021

	Construction	Manufacturing	Other	Services	Agriculture[90]
Armagh City, Banbridge and Craigavon	5.4%	16.3%	1.4%	74.1%	2.8%
Derry City and Strabane	4.5%	9.8%	1.4%	83.0%	1.4%
Fermanagh and Omagh	7.0%	14.0%	2.3%	72.9%	3.7%
Mid Ulster	9.8%	28.1%	2.1%	57.4%	2.7%
Newry, Mourne and Down	6.6%	13.1%	2.4%	75.3%	2.5%
Northern Ireland	5.3%	10.8%	1.6%	80.9%	1.4%

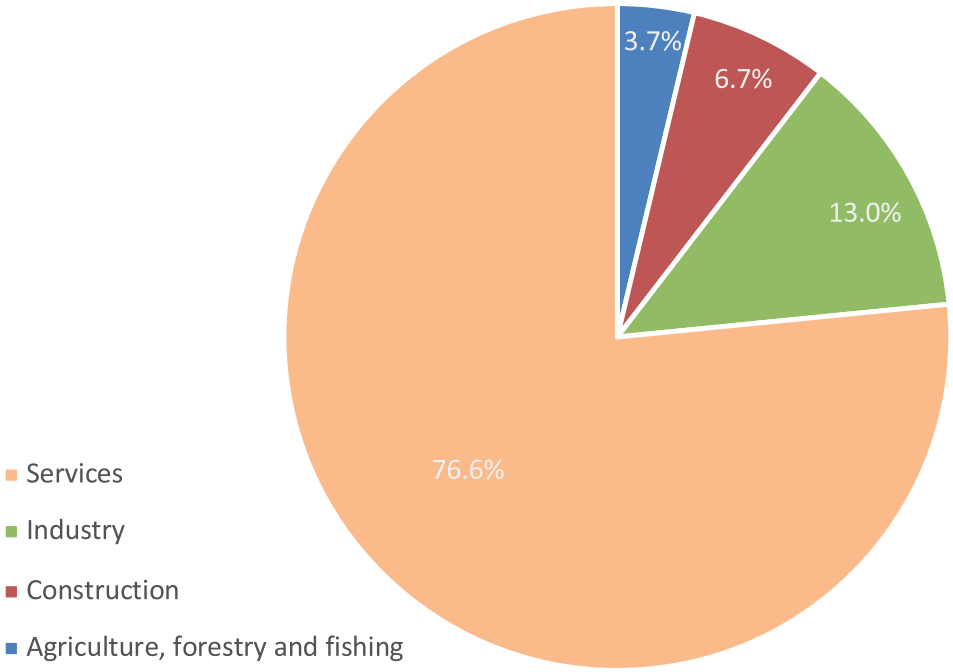
89 Based on NISRA's 2021 BRES Publication Tables (30 June 2022), specifically Table 3.2: Number of Employee Jobs by District Council Area and Headline Industry, September 2021, and Annex 1: Number of employee jobs in agriculture by District Council Area, June 2021.

90 Agriculture employee job figures are taken from the Agriculture Census in Northern Ireland 2021, published by the Department of Agriculture, Environment and Rural Affairs. The agriculture job counts included in this report are Farm labour: Other Workers.

With the exception of Derry & Strabane (83%), Table 15 above shows how in 2021 the service sector employed a smaller percentage of people in border areas than was the case for the Northern Ireland average (80.9%), most notably the case for Mid Ulster. Here, whereas the services sector only accounted for 57.4% of employee jobs, manufacturing represented 28.1%, more than double the figure for Northern Ireland at large (10.8%). This sector was also more prominent in terms of the share of employee jobs in the other LGDs (NUTS 3 areas) within the border region, except for Derry & Strabane, where it accounted for 9.8% (a slight decrease from the previous year). Construction accounted for more employee jobs in four of the five LGDs (NUTS 3 areas). In Derry and Strabane, construction accounted for 4.5% compared to the Northern Ireland average of 5.3%, while construction in Mid Ulster accounted for 9.8% of employee jobs. In overall terms, agriculture was not a significant sector for employee jobs, with Fermanagh & Omagh having the highest share in this sector, at 3.7%.[91]

CSO's Labour Force Survey for the third quarter of 2022 includes the distribution of those aged 15 years and over in employment by business sectors, including agriculture, as set out in Chart 15.[92]

Chart 15: % of persons aged 15 years and over in employment by broad sector in the Republic of Ireland (Q3 2022)



The above chart shows that, as was the case in Northern Ireland, the services sector accounts for the largest share of those employed (76.6%) in the Republic of Ireland, although its dominance is not as marked as in Northern Ireland. A slightly higher percentage of people are engaged in the construction, industry, and agriculture sectors than in Northern Ireland.[93]

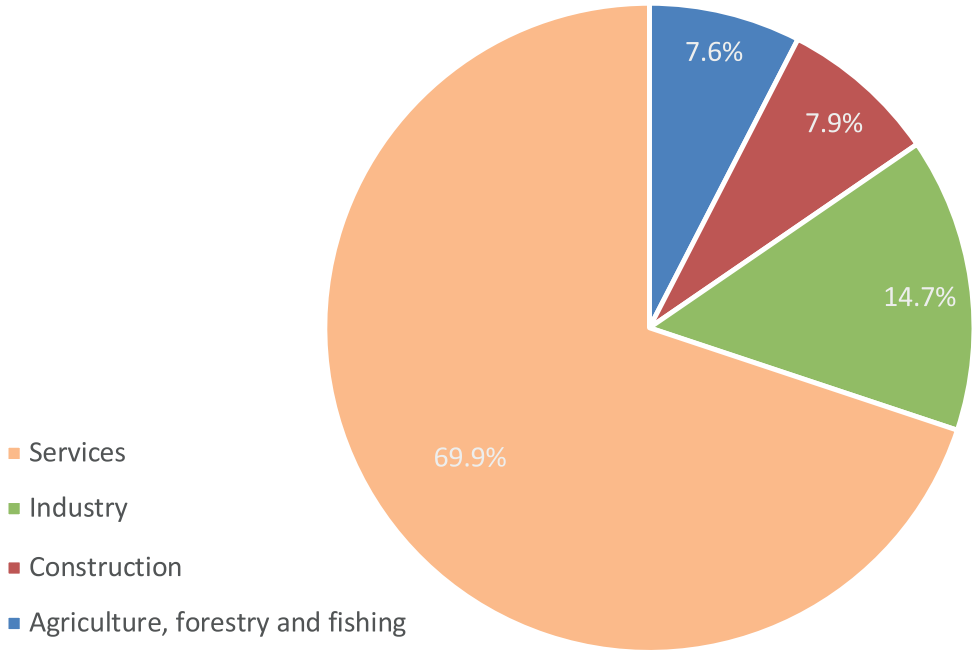
91 Based on NISRA's 2021 BRES Publication Tables (30 June 2022), specifically Table 3.2: Number of Employee Jobs by District Council Area and Headline Industry, September 2021. Note that agriculture has been included in this table using data from the appendix in the BRES tables.

92 CSO, Persons aged 15-89 years in Employment (QLF07) (November 2022).

93 In the calculations those who had not stated the sector in which they were employed have been discounted.

However, as shown in Chart 16, there are some variations from this national distribution pattern in the Border Regional Authority area.[94]

Chart 16: % of persons aged 15 years and over in employment by broad sector in the Border Regional Authority Area (Q3 2022)



In the Border Regional Authority area there were approximately 7% fewer people employed in the services sector than the average, with 1.7% more employed in industry, and more than double (7.6%) in agriculture, forestry and fishing.

The Mid-East region, which includes Co. Louth, did not diverge substantially from the overall national pattern of employment distribution, with the services sector and construction sector employing marginally more with 77.7% and 7% respectively. Other industries were slightly less represented than the national average.

For a number of reasons, it is difficult to accurately gauge the opportunities for employment in the Northern Ireland-Ireland border region and how it compares with opportunities available in the respective jurisdictions. Moreover, straightforward comparisons cannot be made between the two jurisdictions. In the case of Northern Ireland, therefore, it is possible to look at the number of job vacancies notified to Jobs & Benefits Offices of the Department for Communities (DfC) in the 2021/22 financial year and see how many of these are available in the five LGDs in the Northern Ireland-Ireland border region.[95]

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94 CSO, "Persons aged 15 years and over in Employment" (QLF07), Labour Force Survey (24 September 2021).

95 As the Department for Communities' "Statistical Bulletin: Employment Vacancies Notified to the Department for Communities – 2021/22 Financial Year" (11 May 2022) cautions: "The statistics presented here do not relate to the total unsatisfied demand for staff by employers, but to only those vacant positions that have been notified by employers to DfC" (p.3).

Table 16: Employment vacancies to DfC (2021/2022) [96]

	Number of vacancies	Number per 1,000 of resident population	% change from previous year
Armagh City, Banbridge and Craigavon	12,042	54.6	78%
Mid Ulster	5,081	33.6	54%
Derry City and Strabane	5,711	37.7	113%
Newry, Mourne and Down	4,336	23.6	94%
Fermanagh and Omagh	3,135	26.5	234%
Northern Ireland	91,087	47.7	99%

The five local government districts which abut the Northern Ireland-Ireland border accounted for 33% of the total vacancies in Northern Ireland in 2021/22. As can be seen in Table 16, there has been a substantial increase in the number of vacancies across all border LGDs (and indeed all 11 LGDs experienced significant increases in advertised vacancies on 2020/21). Though the DfC cautions that "this must be viewed in the context of the COVID-19 pandemic and the re-opening of the economy from restrictions".[97] Fermanagh & Omagh and Derry & Strabane both recorded much bigger increases than the Northern Ireland average (234% and 113% respectively). In the previous year, Derry & Strabane and Fermanagh & Omagh both had much sharper drops in vacancies when compared with the Northern Ireland average.

Although there are no readily available data at the LGD level, the sectors of economic activity in Northern Ireland with the highest number of notified vacancies to the DfC in 2021/22 by Standard Occupation Code (SOC) were: "Personal Service Occupations", making up 27% (24,260) of all vacancies, an increase of 84% on 2020/21; "Elementary Occupations" (17,121, with the largest increase of any occupation, up 192% year on year); "Process, Plant & Machine Operatives" (10,998, a 108% increase) and "Associate Professional & Technical Occupations " (10,011, up 57% on 2020/21). Indeed, all reported occupations reported an increase in vacancies from 2020/21, with the lowest increase being in "Professional" which increased by 29%. "Managers & Senior Officials" account for the lowest number of overall vacancies, at just 3% of all notified vacancies, however the number of vacancies has almost doubled since 2020/21.[98]

The CSO's estimates for the third quarter of 2022 sets the number of job vacancies in the Republic of Ireland at 33,100 (which, represents an increase of just 6% from Q3 of 2021, when there were 31,100 vacancies). Prior to the Covid-19 pandemic, the number of job vacancies had peaked in Q2 of 2018 at 22,000. The sectoral distribution of these vacancies is shown in Table 17.[99]

96 NISRA, Employment vacancies bulletin tables April 2021 to March 2022 (table LGD2014).

97 Department for Communities "Statistical Bulletin: Employment Vacancies Notified to the Department for Communities" p.8.

98 Department for Communities, "Statistical Bulletin: Employment Vacancies Notified to the Department for Communities – 2019/20 Financial Year", p.10.

99 CSO, Earnings and Labour Costs Quarterly Q3 2022 (prelim) "Job vacancies by economic sector and other characteristics and quarter".

Table 17: Number of job vacancies in the Republic of Ireland by economic sector (Q3 2022)

	Q3 2021	Q3 2022	% Change
Industry	2,600	2,400	-7.7%
Construction	1500	2000	33.3%
Wholesale and retail trade	3200	3,600	12.5%
Transportation and storage	400	1600	300.0%
Accommodation and food services	3,500	1100	-68.6%
Information and communication	1900	1,900	0.0%
Financial, insurance and real estate	2,500	3,100	24.0%
Professional, scientific and technical	3,800	4,600	21.1%
Administrative and support services	2700	1600	-40.7%
Public administration and defence	3,900	3,800	-2.6%
Education	2,100	3,700	76.2%
Human health and social work	2,500	3,100	24.0%
Arts, entertainment and recreation	800	600	-25.0%

Professional, Scientific and technical activities had the highest number of vacancies in the third quarter of 2022 (4,600, up by 21.1% on Q3 2021), followed by Public administration and defence (3,800), Education (3,700) and Wholesale and retail trade (3,600). Transport and storage experienced the biggest increase in advertised vacancies, up 300% from 400 to 1,600. There was no change in the number of advertised vacancies for jobs in information and communication, while accommodation and food services experienced the biggest decline in advertised vacancies, falling by 68.6% from 3,500 in Q3 2021 to 1,100 in Q3 2022.

Regional and local level figures are not available through the CSO vacancy data. However, some insights can be gained through an online Irish recruitment agency's report on vacancies for Quarter 3 of 2022. It notes how, "for the first time in seven quarters, the index reveals that vacancies across Ireland have decreased, with a -9% drop year-on-year and a -4% drop quarter-on-quarter."[100] [101] The report presents its data at the county level, showing year-on-year and quarterly changes in vacancies across all counties.[102] The report states, 'seventeen counties have experienced a decrease in vacancies over the quarter, with particularly strong falls in Carlow (-44%), Donegal (-22%) and Roscommon (-20%)".[103] Only five counties experienced a year-on-year increase with the highest year-on-year increase seen in Cork (+16%) and Offaly (+13%). Table 18 focuses specifically on the data relating to the six border counties. Donegal experienced the highest year-on-year change at a decrease of 46%. Louth was the only one of the border counties to see a year-on-year increase in the number of job vacancies at 6%.

[100] IrishJobs-Jobs-Index-Report-Q3-2022_FINAL.pdf, p.2.

[101] Irishjobs.ie, "Jobs Index Q2 2022" p.5.

[102] Ibid, p.15.

[103] Irishjobs.ie, "Jobs Index Q3 2022" p.14.

Table 18: Year-on-year and quarterly % change in number of job vacancies (Q3 2022)

Counties	Year-on-year change	Quarterly change
Cavan	-2%	-6%
Donegal	-46%	-22%
Leitrim	-12%	-1%
Louth	6%	9%
Monaghan	-16%	-2%
Sligo	-8%	-6%

In the wake of the Covid-19 pandemic and the various restrictions put in place to address it, Irish employers and employees had been adapting to and integrating the practice of working remotely. According to the Jobs Index Report for Quarter 3 2022, working from home job vacancies had been rising very strongly until the third quarter of 2022. The report notes "working from home vacancies grew at a faster rate than overall vacancies, which supported the idea that it was set to become a permanent feature of the post-pandemic labour market". Reporting a decrease of 9%, quarter three of 2022 is the first period to experience a fall in the working from home vacancies; however, whether or not this represents a reversal of the trend will only be evident from examining future quarterly reports.

Irishjobs.ie previously noted that 'employers believe the office still has an important role to play in the workplace ecosystem'.[104] A report published by the UUEPC in February 2022 notes that "Pre-COVID, home working (complete or regular) applied to less than 10% of the NI labour force. This increased to 41% in April 2020 and fell slowly to 30% in May 2021, but even with the lifting of restrictions homeworking remains at 17%".[105] This could be indicative of a similar belief of employers in Northern Ireland that, like their counterparts in the Republic of Ireland, there is still a need for "physically present" roles in the workforce.

[104] Ibid.

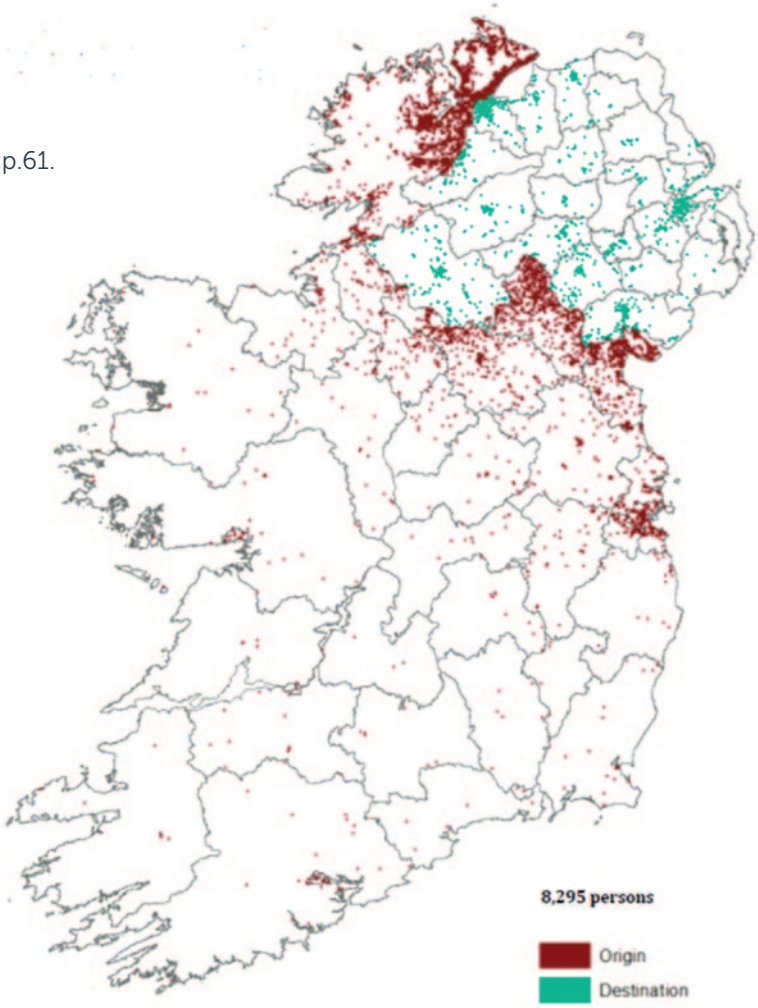
[105] Future of Remote Working in Northern Ireland: Full Report (ulster.ac.uk), p.36.

Cross-border mobility in the Northern Ireland-Ireland border region

Although, as noted earlier, there is mobility of the two populations between the two jurisdictions on the island of Ireland for a variety of purposes, and not restricted to those living within the Northern Ireland-Ireland border region, the focus here will be on the border region and on issues of mobility with relevance to the labour market. In their joint report of 2014, the CSO and NISRA noted that the "majority of those [from Ireland] who commuted to Northern Ireland were resident in the border areas of Donegal, Cavan, Monaghan and Louth", and while the residence of those commuting in the opposite direction "was more widely spread across Northern Ireland", "much of the activity is in border areas". However, bearing in mind that cross-border commuting for the purpose of education is included in this data, it is worth noting how the destinations of these cross-border commuters is not restricted to the Northern Ireland-Ireland border region, as the same report points out. In respect of commuters from Ireland, "Their destinations [...] were mainly concentrated in the Belfast and Derry LGDs, with further clusters in Newry, Armagh, Craigavon, Dungannon, Enniskillen, Omagh, Limavady, Strabane and Coleraine". The destination of those commuting from Northern Ireland "is concentrated in Dublin, with further clusters in the towns of Letterkenny, Drogheda, Dundalk, Cavan and Monaghan".[106] It is worthwhile reproducing here two maps included in the CSO and NISRA report to better illustrate the geography of these flows of cross-border commuters, bearing in mind, of course, that more recently the strength of these flows will have been affected by the Coronavirus pandemic.

Map 5: Origin and destination of cross-border commuters from Ireland to work or study in Northern Ireland.

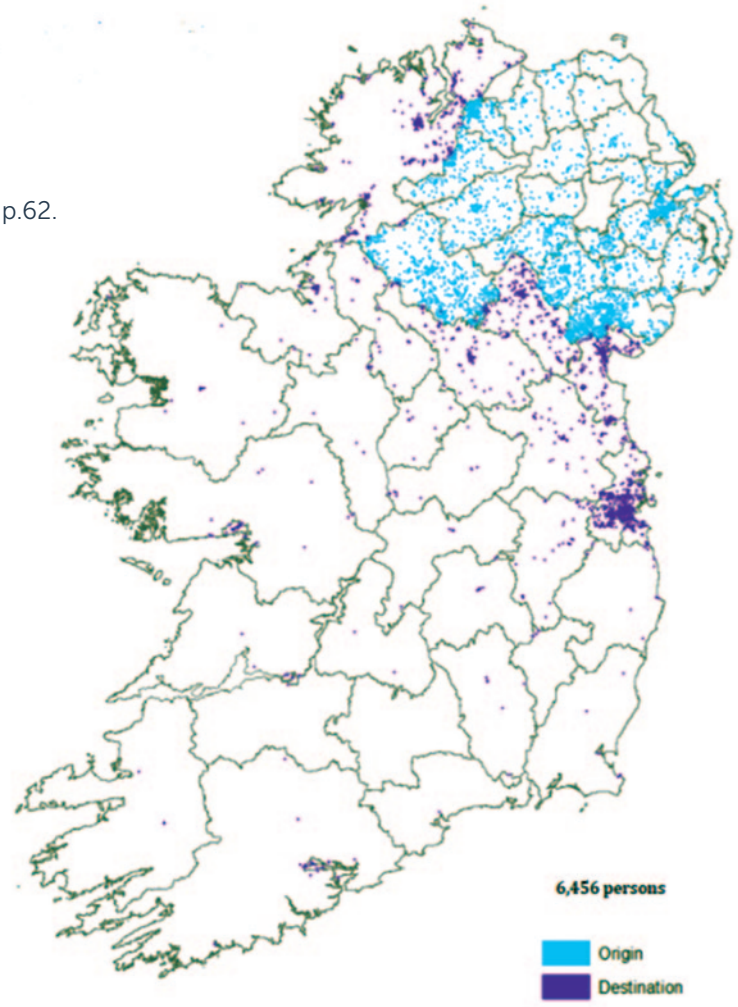
"Census 2011: Ireland and Northern Ireland" , p.61.



[106] CSO and NISRA, "Census 2011: Ireland and Northern Ireland" (June 2014), p.60.

Map 6: Origin and destination of cross-border commuter from Northern Ireland to work or study in Ireland.

"Census 2011: Ireland and Northern Ireland" , p.62.



A more recent report by Northern Ireland's Department for the Economy suggested that "commuter patterns indicate 'hotspots' between Derry-Londonderry and Donegal and between Newry and Dundalk (located on the Dublin-Belfast axis)", and that "Other noteworthy interactions include Cavan and Enniskillen, Lifford and Strabane and Monaghan and Armagh".[107] It also reflected on engagement it undertook with stakeholders in the North West of the island of Ireland, which "highlighted the importance of cross border workers", and how "over the past 10-15 years there has been a large number of people from Derry-Londonderry who have moved to live in the towns and villages in Donegal in close proximity to the border while continuing to work in [Northern Ireland]" (p.19).

In its analysis of data provided by the 2016 Census, the CSO reports:

> *"Census 2016 recorded 9,336 people who crossed the border for work and school, a decrease of 2.1% on the 2011 figure of 9,536. Workers made up three quarters, 7,037 of commuters, up 10%, while students accounted for the remainder (2,299 down 26%). Donegal accounted for the largest number of cross border commuters, with 5,600 commuters, 76 per cent of whom travelled to Co. Derry".*[108]

[107] Department for the Economy, "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border" (March 2018), p.6.

[108] CSO, "Cross Border Commuters 2016", p.2.

Two points arise from these figures. First, the fact that whilst overall cross-border commuting witnessed a decline in terms of the numbers travelling from Ireland to Northern Ireland, those doing so for reasons of work actually increased. The second point is the fact that, as noted earlier in the present report, census figures will not include self-employed workers, such as freight drivers and builders, who work on both sides of the border but do not have a permanent place of work. The figures are also likely to exclude people such as those working in sales or construction who work mainly from home but may have to cross the border regularly for work reasons. Nevertheless, using the data from the 2016 Census, Table 19 shows the counties of origin (left-hand column) and destination of people travelling from Ireland to Northern Ireland to work.

Table 19: Persons aged 15 years and over usually resident in Ireland by county of place of work in Northern Ireland and county of usual residence (2016)

County	Antrim	Armagh	Derry	Down	Fermanagh	Tyrone	Total
Carlow	0	1	2	1	1	1	6
Dublin City	62	18	11	36	2	16	145
Dun Laoghaire-Rathdown	35	6	1	11	0	3	56
Fingal	38	16	10	20	2	12	98
South Dublin	28	4	2	14	1	6	55
Kildare	19	13	4	10	4	5	55
Kilkenny	8	1	1	1	1	1	13
Laois	4	3	0	3	5	4	19
Longford	3	0	1	0	6	2	12
Louth	99	326	7	277	2	20	731
Meath	29	23	6	33	6	6	103
Offaly	7	3	2	1	2	3	18
Westmeath	12	4	2	4	2	3	27
Wexford	7	0	0	3	0	1	11
Wicklow	11	6	2	8	2	6	35
Clare	6	3	2	2	1	2	16
Cork City	4	1	0	2	0	2	9
Cork County	22	5	3	5	2	2	39
Kerry	4	2	3	4	0	1	14
Limerick City and County	7	3	0	2	2	0	14
Tipperary	9	2	0	4	1	6	22
Waterford City and County	2	1	1	2	1	2	9
Galway City	6	0	3	1	0	0	10
Galway County	12	1	6	9	2	2	32
Leitrim	4	3	3	1	106	17	134
Mayo	5	2	4	4	3	7	25
Roscommon	10	1	3	4	8	1	27
Sligo	5	4	0	1	16	2	28
Cavan	12	31	7	12	353	22	437
Donegal	191	20	2965	29	109	612	3926
Monaghan	68	428	13	81	134	187	911
Ireland	729	931	3064	585	774	954	7037

The figures underline Donegal and Derry's position as the prime sites of cross-border mobility for reasons of employment for those residing in the Republic of Ireland. While according to the 2016 census 3,926 people from Donegal crossed the border to work in Northern Ireland, Derry was the recipient of 3,064 cross-border workers from Ireland. Four of the six Irish counties within the Northern Ireland-Ireland border region occupied the top four positions in terms of numbers of their respective populations travelling across the border to work, with Dublin City placed fifth (with 145), ahead of Co. Leitrim in sixth (with 134). According to the census, only 28 residents from Co. Sligo crossed the border to work in Northern Ireland.[109]

There is no equivalent 2016 census data for Northern Ireland, although a September 2018 Research Bulletin by Northern Ireland's Department for the Economy on "The movement of people across the Northern Ireland-Republic of Ireland border" provides some insights using data from mobile phones. It estimated that Northern Ireland residents make 60,804,000 border crossings per year, and that the majority of them (using the old 26 Local Government Districts) originated in Derry (35.6%), Fermanagh (14.6%), Newry and Mourne (14%), Strabane (7.9%), and Dungannon and Armagh (both at 6.6%). "It was found", the report states, "that 88% of crossings by [Northern Ireland] residents started in border LGDs" (p.6). Although the use of mobile data did not allow to ascertain the ultimate destination of Northern Ireland residents crossing the border, the report estimated that on average 35% of border crossings by Northern Ireland residents are work related.

In the absence of more recent data, the table below returns to the 2011 census for Northern Ireland to gain some understanding of where Northern Ireland residents working in the Republic of Ireland were coming from.[110]

Table 20: Northern Ireland residents (aged 16-74, excluding students) working in the Republic of Ireland (2011)

Antrim & Newtownabbey	**74**
Ards & North Down	76
Armagh, Banbridge & Craigavon	712
Belfast	238
Causeway Coast & Glens	133
Derry & Strabane	1,228
Fermanagh & Omagh	1,294
Lisburn & Castlereagh	140
Mid & East Antrim	70
Mid Ulster	356
Newry, Mourne & Down	1,749
Northern Ireland	6,070

[109] CSO, "E6045: Population Aged 15 Years and Over at Work, Usually Resident and Present in the State 2011 to 2016 by County of Place of Work, County of Usual Residence and Census Year".

[110] The data employed here is extracted from Census 2011, "Location of Usual Residence by Place of Work in Republic of Ireland (ROI): CT0354NI".

According to the 2011 Census, the five Northern Ireland LGDs abutting the border occupied the top five positions in terms of numbers of their residents working in the Republic of Ireland, with Belfast coming sixth. Newry, Mourne & Down had the highest number (1,749), followed by Fermanagh & Omagh (1,294) and Derry & Strabane (1,228).

The following table sets out the counties in the Republic of Ireland where residents from the five Northern Ireland LGDs in the Northern Ireland-Ireland border region work.

Table 21: Distribution of residents of 5 Northern Ireland LGDs according to their place of work in the Republic of Ireland (2011)

	Armagh, Banbridge & Craigavon	Derry & Strabane	Fermanagh & Omagh	Mid Ulster	Newry, Mourne & Down	Total
Dublin City	75	21	48	37	218	399
South Dublin	13	7	7	5	38	70
Fingal	39	5	18	9	82	153
Dun Laoghaire-Rathdown	17	4	10	11	32	74
Kildare	3	8	6	8	17	42
Louth	124	6	13	18	747	908
Meath	16	1	4	8	53	82
Leitrim	0	0	59	2	2	63
Sligo	1	2	65	2	0	70
Cavan	22	3	345	12	7	389
Donegal	7	855	199	11	8	1,080
Monaghan	233	6	243	119	107	708
Other*	162	310	277	114	438	1,301

* Respondents did not specify where they worked in the Republic of Ireland.

According to the data from the 2011 census, the five counties or cities in Ireland that attract the most residents in the five Northern Ireland LGDs in the border region to cross the border to work were: Donegal (1,080), Louth (908), Monaghan (708), Dublin City (399), and Cavan (389). For those travelling from Belfast to work in Ireland, Dublin city was the top destination, followed by Co. Louth and Dun Laoghaire-Rathdown.

The 2014 joint report by the CSO and NISRA analysing the data from the 2011 censuses in the two jurisdictions noted that in terms of employment, "the most important industry for cross-border commuters was wholesale and retail, accounting for 16 per cent of persons travelling to Ireland from Northern Ireland and 14 per cent commuting in the opposite direction" (p.64). It also highlighted the importance of education and health services, which together accounted for 28 per cent of those commuting from Ireland to Northern Ireland, and 22 per cent of those commuting in the opposite direction. However, the report does not comment on the fact that approximately 14% of those commuting from Ireland to Northern Ireland and 12.5% of those commuting in the opposite direction did so to work in the manufacturing (including mining) sector.

In terms of the occupations of those crossing the border to work, the same report states:

> *"Cross-border commuters were proportionally more likely than the general population to be working in managerial and professional roles. Together, managers, directors and professionals accounted for 44 per cent of workers in Ireland from Northern Ireland, and 38 per cent of those from Ireland commuting to work in Northern Ireland. Given the importance of the health and education industries for cross-border commuters, it is unsurprising that the professional occupations group was the most important category for both sets of workers" (p.64).*

However, it also noted how, "in general, a higher percentage of those travelling to Ireland from Northern Ireland to work could be found in managerial and professional roles, while among those commuting to Northern Ireland from Ireland there was a greater number in occupational groups requiring lower skill levels, including operatives and elementary trades" (p.64).

The Results

Based on the relevant data available, a number of conclusions highlighted in the report undertaken for the Cross Border Partnership for Employment Services in 2022 continue to hold validity, beginning with the focal points of cross-border labour mobility in the Northern Ireland-Ireland border region, as well as the characteristics relating to the labour market environment in the Northern Ireland-Ireland border region. These include:

- The cross-border route between Derry & Strabane and Co. Donegal is the most intensive for the mobility of labour, with the flow being stronger in numerical terms from Donegal to Derry & Strabane.
- All of the LGDs (NUTS 3) areas in Northern Ireland within the border region are the most significant sites in terms of cross-border labour mobility from Northern Ireland to the Republic of Ireland (North to South).
- Four of the six Irish counties within the Northern Ireland-Ireland border region are important points of origin for cross-border labour mobility into Northern Ireland (South to North), with significant numbers of workers undertaking this type of mobility: Donegal, Monaghan, Louth and Cavan.
- All of the five LGDs (NUTS 3) areas in Northern Ireland within the border region are important destinations for cross-border labour mobility from the Republic of Ireland (South to North).
- Sligo and Leitrim appear to be of lesser significance as destinations for cross-border labour mobility from Northern Ireland (North to South), with other counties outside the Northern Ireland-Ireland border region holding greater relative importance, especially along the Belfast-Dublin corridor.
- Northern Ireland's older population continues to increase (with an estimated rate of growth in the year from June 2020 to Census Day 2021 of 2% of those aged 65 and over),[111] and it is predicted that it will outnumber those aged 0-15 by 2028. However, both in Northern Ireland and the Republic of Ireland, the percentage of the population aged 65 and over in 2021 (17.2% in Northern Ireland and 15.1% in the Republic of Ireland) is still below the UK and EU averages (18.6% and 20.8% respectively).
- The population in the Northern Ireland-Ireland border region continues to grow at a steady rate with a higher percentage of younger people than the respective jurisdictions. Based on these figures, the region will have a proportionally significant growth in those entering the potential labour force. However, the region also has a higher proportion of people aged 65 and over than is the case for either jurisdiction as a whole.
- The Republic of Ireland continues to have a larger proportion of the population achieving a higher level of education than Northern Ireland. As stated elsewhere in this report, lack of qualified personnel and lack of skills are two of the main drivers for recruitment of a cross-border basis.

[111] Figures based on 2020 mid-year estimates and Census 2021 estimates

- Educational attainment in the Northern Ireland-Ireland border region continues to underperform in relation to general levels of attainment. In 2021, a lower percentage of those aged 16-64 in the LGD's abutting the border had achieved an NVQ Level 4 qualification or above than the overall percentage for Northern Ireland.
- More than half (52.9%) of all registered businesses in Northern Ireland in 2022 are located in the five LGDs/NUTS 3 areas that form part of the Northern Ireland-Ireland border region. It is estimated that in 2020 the Northern Ireland-Ireland border region accounted for almost a fifth (19.2%) of all active enterprises on the island of Ireland.
- As is the case for the island of Ireland as a whole businesses employing fewer than ten people continue to dominate the business landscape in the Northern Ireland-Ireland border region, although with some isolated but significant instances of businesses in the larger employment size bands.
- In 2022 71% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five NUTS 3 areas adjoining the border (unchanged from 2021), which also contained 60.1% of all construction businesses (up 0.4ppt), 50.1% of all transport and storage businesses (up 2.8ppt), 55.6% of all production businesses (up 0.1ppt), and 49.1% of all retail businesses (up 0.3ppt). In contrast, the same areas only contained 27.1% of all information and communication businesses (up 0.2ppt), and 37.9% of all professional, scientific and technical businesses (up 0.7ppt).
- In terms of employment, the services sector employs the largest numbers of people in the Northern Ireland-Ireland border region, as is the case for the island of Ireland as a whole. However, a higher percentage of people continued to be employed in manufacturing and construction in the border region than elsewhere.
- Employment rates of 16-64 year olds in Fermanagh & Omagh, Mid Ulster, and Armagh, Banbridge and Craigavon over-performed the overall Northern Ireland level in 2021 while Derry and Strabane and Newry, Mourne and Down were below.
- 2/5 border LGDs saw an increase in the employment rate with Fermanagh and Omagh increasing by 5.4 percentage points and Derry City & Strabane increasing 4.6 percentage points. The employment rate in Armagh City, Banbridge and Craigavon, Mid Ulster and Derry City and Strabane fell between 2020 and 2021.
- The five Northern Ireland LGDs which abut the Northern Ireland-Ireland border accounted for 33% of the total vacancies in Northern Ireland in 2021/22. There was a substantial increase in the number of vacancies across all border LGDs, although this must be seen in the context of the Covid-19 pandemic. Fermanagh & Omagh and Derry City & Strabane both recorded much bigger increases than the Northern Ireland average (234% and 113% respectively). In the previous year, Derry City & Strabane and Fermanagh & Omagh had both much sharper drops in vacancies when compared with the Northern Ireland average.
- In the post-Covid19 pandemic context, remote working has continued to feature as an important practice, although the rate of increase in remote working roles has appeared to slow down considerably in comparison to what was the case in 2021. Irishjobs.ie reported an 9% quarterly decrease in remote working roles in Q3 2022.

- The Border Regional Authority had one of the lowest ILO Participation rates (62%) for Quarter 3 of 2022, which had remained unchanged from Q3 2021 and continues to fall below the national participation rate of 64.8%. The Mid-East region, which contains Co. Louth, experienced a decrease of 0.8% in ILO participation from Quarter 3 in 2021, from 66.3% to 65.5%.
- The Claimant Count (working age population) for Northern Ireland has recorded a year-on-year decrease of 0.3% in December 2022, from 3.4% in December 2021 to 3.1% in December 2022.

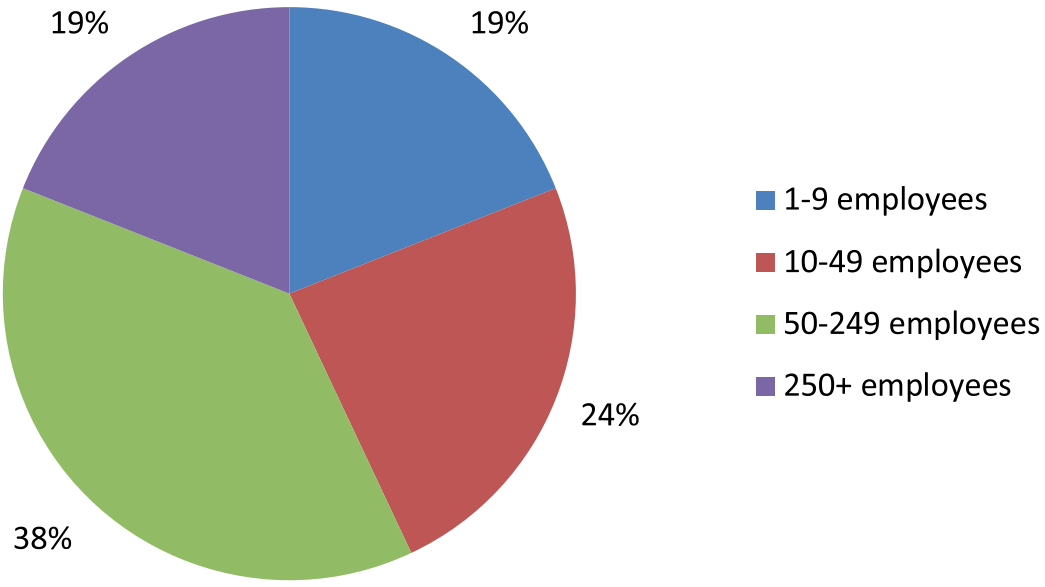
Survey of cross-border employers and results

The Cross Border Partnership for Employment Services and the Chambers of Commerce in the Northern Ireland-Ireland border region conducted a survey of employers in November 2022. The overarching purpose of the survey was to measure the number and nature of cross-border employees. The survey was issued to a number of businesses, with 84 responding, the majority of which were based in the border region and their responses recorded. Businesses were asked a series of questions regarding their profile and their involvement with cross-border workers, and their responses can be seen as an indication of trends. However, given the comparatively small number of responses, definitive conclusions based solely on this survey should be avoided.

Profile of respondents

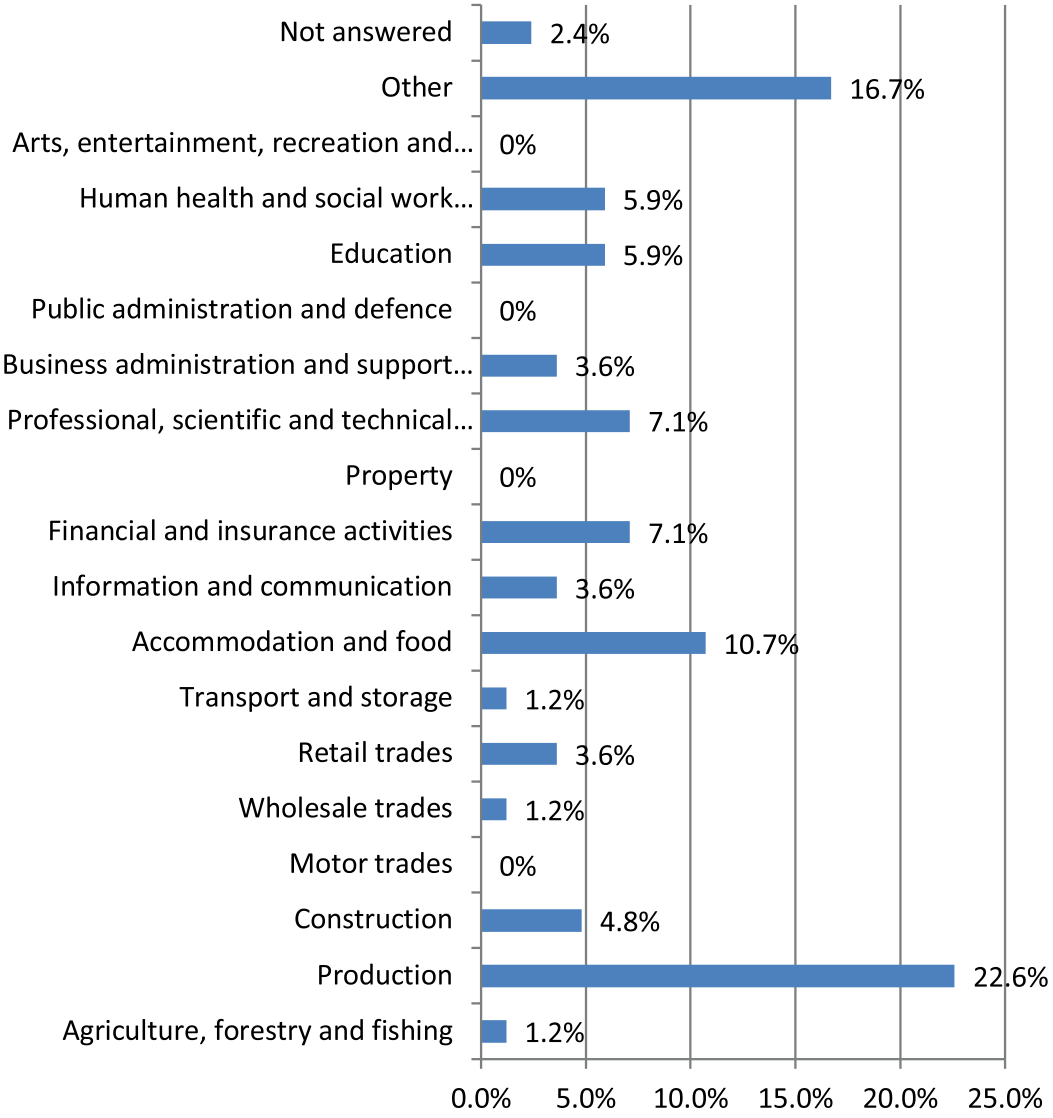
The highest proportion of respondents to the Cross Border Partnership for Employment Services survey were businesses employing 50 to 249 people, making up 38% of the firms. 19% of businesses responding to the survey employ between 1-9 workers, while 24% of firms employed 10-49 workers. 19% of businesses responding to the survey employed 250 people or more.

Chart 17: Size of businesses responding to the survey by number of employees



The nature of the main economic activity of the businesses that responded to the survey was wide ranging, as can be seen in Chart 18 below, but with the highest percentage of participating firms coming from the production sector (22.6%). The representation of businesses from the production sector, as well as a relatively strong presence of the accommodation and food (10.7%), human health and social work (5.9%), education (5.9%) and construction (4.8%) sectors among respondents to the CBPES survey, is generally in line with the overall economic profile of the Northern Ireland-Ireland border region suggested by the data analysed earlier in this report. However, the responses from businesses in the professional, scientific and technical activities (7.1%) and financial and insurance (7.1%) sectors are somewhat above the average for the border region as a whole.

Chart 18: Nature of the main economic activity of the businesses

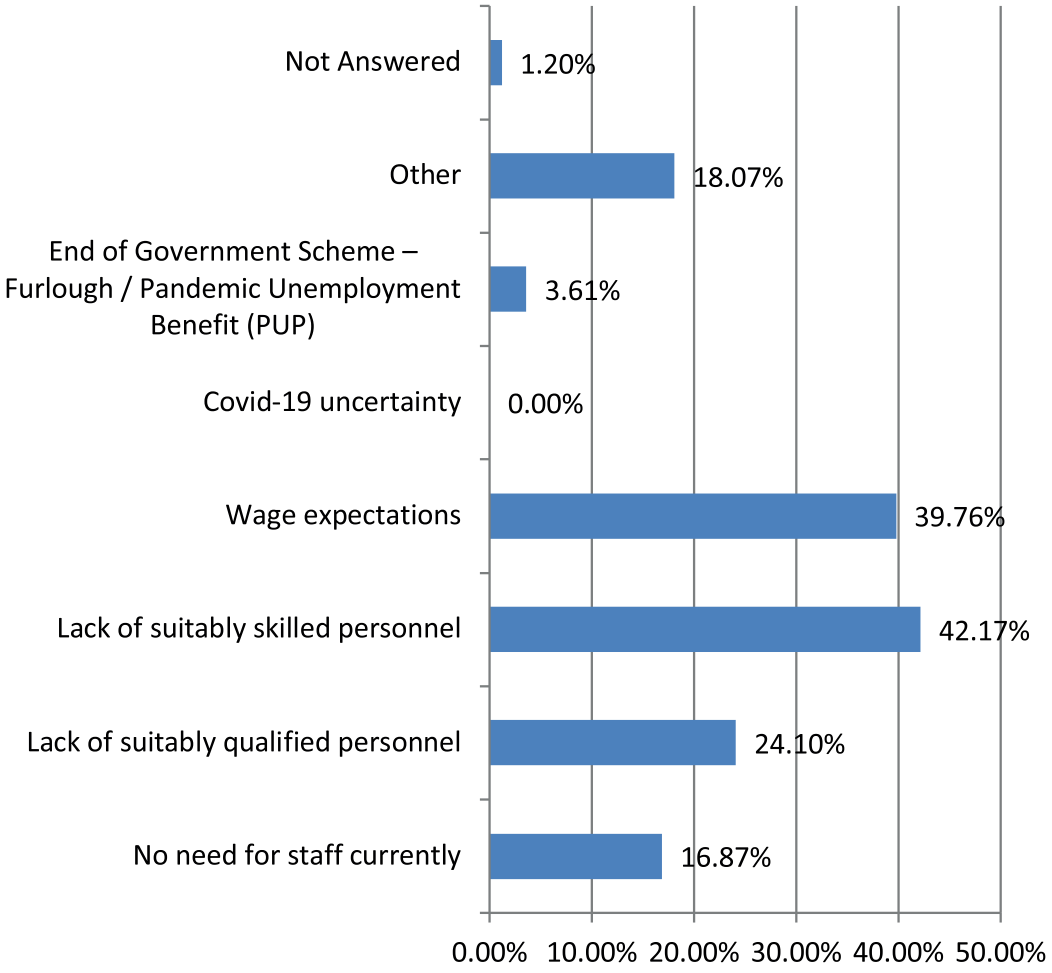


The vast majority (93%) of the organisations who responded to the CBPES survey were located in counties in the Northern Ireland-Ireland border region, with only a small number of isolated cases of respondents describing themselves as based outside the region. Within the border region, the majority of responses came from Co. Derry/Londonderry (30.9%). Next was Co. Louth which accounted for 23.8%, followed by Co. Donegal with 16.7%.

Staff Recruitment

In assessing the barriers that businesses face in recruiting workers, the survey identified common obstacles across a range of businesses from different sectors (Chart 19). While 14 (16.87%) of the 80 respondents to this question reported that they were currently not in need of any staff, 42.17% of those who did cited a lack of suitably skilled personnel, seen as the most significant barrier to recruitment. However, the second most significant barrier was wage expectations, with 39.76% of respondents citing this as an issue for them, placing it above a lack of suitably qualified personnel (24.1%). Although 3.61% of respondents identified the end of the furlough and Pandemic Unemployment Benefit schemes as barriers to recruitment, it is important to note that no respondent cited Covid-19 uncertainty as an obstacle.

Chart 19: Barriers to recruitment

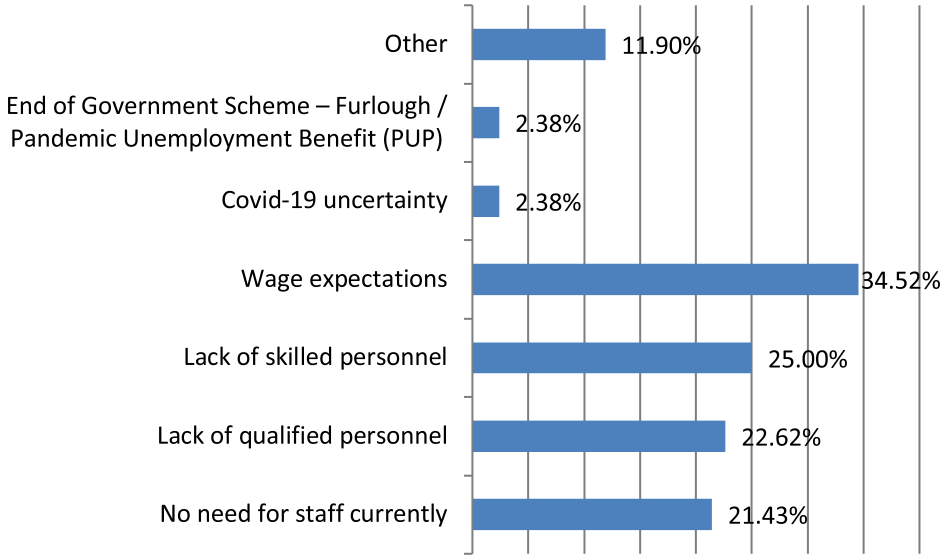


Cross Border Workers and Recruitment

Of the businesses responding to the survey, 72.62% stated that they employ staff who are normally resident on the other side of the border, with the vast majority of these employers (71.21%) employing less than 10 cross border workers. However, respondents to the survey who indicated they employed staff who crossed the border to work also reflect the fact that the Northern Ireland-Ireland border region contains significant areas where the percentage of larger businesses is higher than the overall figure for the two jurisdictions. Thus, 15.15% of respondents were from businesses employing between 10 and 49 cross-border workers, with a further 6.1% employing between 50 and 249 cross-border workers, making these not just major employers in the region, but major employers of cross-border workers.

Chart 20 details the biggest barriers to cross border recruitment identified by respondents to the survey.

Chart 20: Barriers to cross-border recruitment



Whereas wage expectations was seen as the second most significant barrier to the general recruitment of workers, it becomes the most significant barrier when it comes to the recruitment of cross-border workers, with 34.52% of respondents citing it as an issue for their businesses. Lack of skilled personnel is seen as the second most important barrier to recruiting cross-border workers (25% of respondents), with lack of qualified personnel following closely in third position (22.62% of respondents).

Wage expectations as a barrier to cross-border recruitment has been seen as a common issue for cross border employers, identified in the 2019 report for the European Parliament on "Employment barriers in border regions". Lack of skills and lack of qualified personnel available to employers remains a constant and important issue for employers. These issues could be addressed by harnessing one of the key benefits of recruiting across borders – access to a wider pool of suitably skilled and qualified potential candidates.

Impact of Covid-19 and UK exit from EU on businesses and staff redundancies

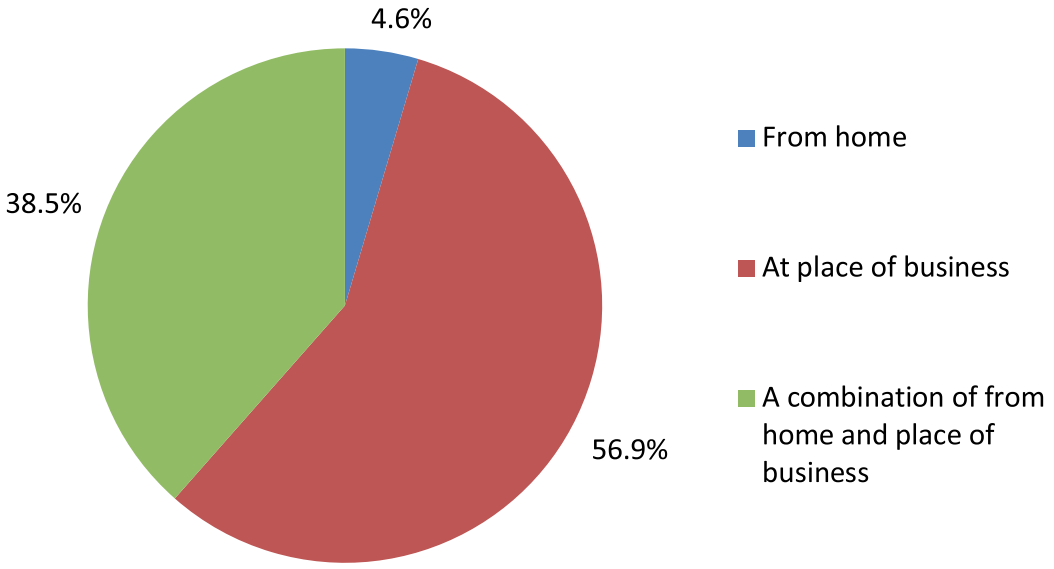
Although none of the respondents to the survey cited Covid-19 uncertainty as an obstacle to general recruitment, and only 2.38% identified it as an issue in relation to the recruitment of cross-border workers, 66.7% of respondents indicated that the pandemic had affected their business. This remains a significant percentage, even if it is below the 79.2% who had identified Covid-19 as impacting negatively on their businesses in the survey undertaken by the EURES Cross Border Partnership in 2021.

The 2021 survey also saw a majority of respondents (64.6%) stating that the UK's exit from the EU had affected their business, while 33.8% indicated that it had not. In the 2022 CBPES survey, 54.8% of respondents who answered this question considered the UK's exit as having impacted their business, with 45.2% stating it had not.

Crucially, however, despite the impacts of the pandemic and the UK's exit from the EU on businesses, the vast majority of respondents to the 2022 CBPES survey (96.4%) indicated that they had no plans to make staff redundant in the coming year.

When asked whether their cross-border staff had been working from home or on site since the Covid-19 pandemic, as can be seen in Chart 21 the responses point to a changed landscape in working patterns, with hybrid working featuring relatively prominently.

Chart 21: Cross-border staff working from home or on site since pandemic



Although the majority of respondents who answered this question (56.9%) reported their cross-border staff working on site since the pandemic, 38.5% stated that their cross-border employees were still following a hybrid style of working, with only 4.6% working solely from home. This compares to 38.2% working on site, 46.1% working a combination of from home and on site, and 15.7% working from home according to the 2021 EURES Cross Border Partnership survey of employers. It will be important to note the trend in hybrid working going forward.

Supports for business

The CBPES survey of employers asked respondents to outline what supports would assist their business. An overview of the frequency and proportional weight of the nature of the supports mentioned in the comments provided by respondents is set out in Table 22.

Table 22: Specific supports for business[112]

Response Category	Frequency of responses	%
Assistance to source staff	12	29%
Grants/ financial support to assist with recruitment	7	17%
Assistance with utility bills	6	14%
Increased clarity re: cross-border rules	3	7%
Reduction in tax burden	3	7%
Other	11	26%

[112] There is a higher frequency of responses in this table than actual responses as some open text responses were not mutually exclusive and were classed in several classification types. Percentages may not sum to 100 due to rounding.

29% of responses called for assistance in sourcing staff, with the open text answers including the following illustrative comments:

- *"Assistance in finding skilled employees on both sides of border".*
- *"Access to schools to promote apprenticeships. Access to applicants who are genuinely seeking work".*
- *"Having a database to find suitable candidates so we can go to that when we are looking to hire would be super useful".*
- *"Recruitment days possibly? Jobs fair where people have an interest in Travel & tourism and wish to work in an accommodation provider setting".*
- *"I believe we would benefit from school visits from our border schools for 4th and 5th year students (male and female) who need help in deciding what to do".*

17% of response types were related to grants/ financial support to assist with recruitment, with the following comments offered by respondents:

- *"Employment Support Grants".*
- *"Training grants and improved employability training during mainstream education".*
- *"Financial support to assist with recruitment of more staff".*
- *"For funders to increase levels of funding to cope with cost of living crisis".*
- *"Grants to expand and hire more staff".*

14% respondents stated that assistance with utility bills would be the specific support that would assist their business:

- *"Assistance with electricity and oil heating costs and rates".*
- *"Cost of living expenses - running a company with large electricity needs means bills have grown threefold. Benefits for staff would take pressure off employees to increase wages".*
- *"Get a handle on costs and stop increasing the need for wage increases as we are killing ourselves against other competitors".*
- *"More restrictions on Insurance companies as to increase in coverage every year. Same with Electricity companies. Overheads are just crippling".*
- *"Energy rate relief".*
- *"Support in utility bills to free up capital for staff wages".*

7% of respondents would like to see increased clarity regarding cross-border rules:

- *"Simplification of and clarity of the cross border rules on remote working".*
- *"More information on the obligations of the employer in terms of cross border workers situation".*
- *"Revenue Advice for Cross Border employees".*

7% of respondents would like to see a reduction of tax burden:

- *"A Reduction in VAT & Relaxing the rules on EU workers".*
- *"Dedicated team to assist with cross border taxation issues".*
- *"Tax breaks".*

There were a number of responses that were classed as 'other' (26%), with the comments provided including the following:

- *"Good Internet connections, improved road and rail access to NW".*
- *"A government campaign for a change of attitude within the education system to recognise the value of trade apprenticeships".*
- *"No more government bailouts. Cut down on bureaucracy. Incentivise the unemployed to get a job".*
- *"We are a community based charity. ESF funding is an important source of revenue. The UK government has failed to deliver on its post Brexit promises. As a result we will have major redundancies next year. The future of the company is in doubt".*
- *"More information on the obligations of the employer in terms of cross border workers situation".*
- *"Awareness of business and information on job opportunities and career progression".*
- *"A continues free movement of labour as we currently have. A border might present issues".*
- *"Recruitment days possibly? Jobs fair where people have an interest in Travel & tourism and wish to work in an accommodation provider setting".*

Additional views on cross-border employment

Respondents to the CBPES 2022 survey of employers were asked to provide any additional comments or concerns relating to cross-border employment, regardless of whether they employed people from any other part of the EU. The comments provided are outlined in Table 23.

Table 23: Comments or concerns regarding cross-border employment[113]

Response Category	Frequency of responses	%
Have employed cross border workers without issues	11	42%
Further advice/ assistance	4	15%
Tax compliance for cross border workers- support required	4	15%
Training opportunities	3	12%
Other	4	15%

[113] There is a higher frequency of responses in this table than actual responses as some open text responses were not mutually exclusive and were classed in several classification types. Percentages may not sum to 100 due to rounding.

42% of qualitative responses implied that respondents had employed cross-border workers without any issues:

- *"We have no concerns regarding cross boarder workers but it is difficult to recruit from ROI due to earning opportunities in the South".*
- *"A person's nationality is not a consideration when hiring. A person's location can be a consideration. We prefer to hire people living in a location near our clients".*
- *"We have always had cross border staff in our employ, it is vital to us that we have voices from the whole region so we can accurately reflect the region's needs".*
- *"We are fortunate being so close to the border that we can attract candidates from both north and south ."*

15% of respondents would like to benefit of further advice/ assistance:

- *"Employment hub for cross border workers should be available listing jobs on both sides of border. Taxation assistance would be of benefit to SME firms".*
- *"We are very open to Cross Border hiring but don't know how to find suitable candidates without advertising jobs which is a big body of work that we never have time for. If there was a database of suitable candidates that we could access (like a catalogue site I suppose?), that would be much more streamline as we could identify immediately who we think was suitable instead of having to go through lots of CVs of people who just aren't right for the job".*
- *"Provide employers with a much better free vacancy job board".*
- *"Need to provide clearer equivalencies in RoI-NI qualifications, especially from QCF programmes - many employers can't match across".*
- *"PPSN – often if there are other opportunities and it is a lot of hassle to get the PPSN and Bank account etc; if the candidate had support on this".*

15% of respondents would like to see specific assistance regarding cross-border tax compliance:

- *"The cross border taxation issue is a significant barrier to resource mobility".*
- *"Tax compliance required for cross border working in respect of both employer & employee is not fully embraced and, in some case not understood leading to potential liabilities and penalties building up. The complexity is also a barrier to cross border working/mobility".*
- *"It should however be stressed that the definition of what a cross-border worker exactly is may vary (e.g. tax law, right of residence, welfare entitlements) ".*
- *"Employment hub for cross border workers should be available listing jobs on both sides of border. Taxation assistance would be of benefit to SME firms".*

12% of respondents would like to see further training opportunities:

- *"Training of young people forms a basis of their approach to industry coupled with a drive to encourage both male and female candidates".*
- *"Further Training Support, Language Support (English Training), Jobsites outdated and hard to navigate, more interaction from personnel".*
- *"English language skills Early professional registration- this can take some time Ease of visa application process".*

There were a number of responses that were classed as 'other' (15%), with comments offered including the following:

- *"We do employ a high ratio of EU workers who have been residents in NI for some time now, but Due to Brexit there is now a vast shortage workers in the hospitality sector".*
- *"Border Control could be a concern. Team members could arrive late or have to leave home earlier to arrive to work"*
- *"Could paying employees in UK bank accounts cause any issues?*

Conclusion

There continue to be underlying issues whose resolution lies outside the Northern Ireland-Ireland border region, and which condition the current cross-border mobility landscape and decisions on how to support jobseekers, workers and employers. Nevertheless, there are certain issues relating to cross-border mobility that may require strategic decisions by those more closely involved in supporting such mobility.

As is made evident by responses to the 2022 Cross Border Partnership for Employment Services survey of employers, there is a clear and continuing need to provide support and tailored information and supports to jobseekers, workers and employers in the border region. Employers and cross-border workers are dealing with the after-shocks of the Covid-19 pandemic and how it appears to have changed patterns of work. They are also seeking to adapt to the changed (and still changing) context resulting from the UK's departure from the European Union.

Crucially, the border region continues to be home to a large proportion of the population on the island of Ireland, as well as to a significant percentage of businesses. Jobseekers, workers and employers addressing challenges that have their own specificities within the cross-border context will be better equipped and informed with an increased availability of tailored information, advice and support, attentive to the nature of cross-border working and employment.

Wage expectations and the increased use of hybrid working patterns present difficulties to both cross-border employers and employees that may not be felt in the same way outside the border region. A shortage of employees with the necessary skills and qualifications continues to be a difficulty identified by employers.

The survey of businesses undertaken by the Cross Border Partnership for Employment Services underlines the vital importance of supporting businesses in the Northern Ireland-Ireland border region to widen their recruitment activities on a cross-border basis. Supporting businesses to do this will contribute to addressing the difficulties businesses encounter in recruiting suitably qualified and skilled staff as well as issues with wage expectations. This will be of even greater importance to sectors with significant growth potential in the region, such as (but not exclusively) information and communication, professional, scientific and technical services, financial and insurance services, and production, where growth is dependent on access to skilled and qualified staff. Additionally, given the unique position that the Protocol on Ireland/Northern Ireland (now the Windsor Framework) provides to Northern Ireland, there are potential opportunities for businesses in Northern Ireland to operate within and across both the UK and EU markets, with the potential for growth and increased employment.

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