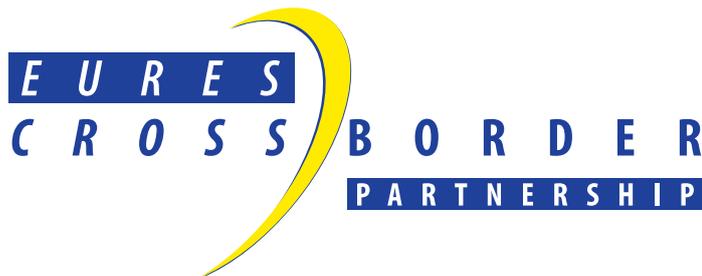


EURES Cross Border Partnership Report: **Labour Market Movement & Skills Gaps** ON THE ISLAND OF IRELAND



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Foreword

The purpose of this paper, which is the second of its kind, is to provide updated, tangible information on cross border activity in the Ireland – Northern Ireland region and build upon 2019's EURES Ireland/Northern Ireland Cross-Border Partnership report "Cross Border Labour Market Movement and Skills Gaps on the Island of Ireland". In line with best practice, information has been gained from the reputable sources that provide such information, mainly - the Central Statistics Office (CSO) in the Republic of Ireland and the Northern Ireland Statistics and Research Agency (NISRA) in Northern Ireland.

From the information provided by CSO and NISRA we have produced a report we hope will support jobseekers, workers and employers in the jurisdiction as well as providing a focus for the EURES Cross Border Partnership regarding our direction of travel for our partnership and where we can use our resources most effectively in the coming years.

In a wider context and as part of the EURES Cross Border Network, the information we are providing will be useful in a comparative context to other border regions across the European Union. This will assist Cross Border Partnerships to analyse the mobility flows and hopefully provide some solutions to the issues faced by jobseekers, workers and employers in the border regions.

The major difficulty in producing a report like this is that there is no one complete and definitive data source that records the number and purpose of all cross-border movements between Ireland and Northern Ireland (indeed all border regions face the same issues) and the exact number of people that cross the border to work or study is difficult to quantify. The sources used in this paper are mainly CSO and NISRA and the information they produce, as well as a survey we have carried out in conjunction with our partners in the Chambers of Commerce.

We hope, given the success of this template in the EURES Ireland/Northern Ireland Cross-Border Partnership report 2019 report, this will continue to be a useful template. The information provided in the paper will continue to be replicated in the coming years and help us provide further analysis and ultimately support to those who work, seek work or employ in the border regions of the island of Ireland.

It is estimated that thousands of people cross the border between Ireland and Northern Ireland for work. It's commonplace for individuals to switch between the two jurisdictions many times during their working lives. Employers use staff from both sides of the border to fill their vacancies and jobseekers look to the other side of the border for vacancies which may suit them. This happens not only in the border regions of Ireland but at borders across the European Union.

The Border region in Ireland has been and remains under a tremendous focus since the UK decision to leave the EU was agreed following the referendum, and as the transition period comes to an end on the 31st December 2020 and the implementation of the Northern Ireland Protocol begins. As Ireland shares the only land border with the UK, this will be of immediate relevance to those workers, employers, and jobseekers in the border. This obviously causes

worry and apprehension for many as the ‘final’ agreement will influence their daily lives and business. Added to this, has been the Covid-19 pandemic, the effects of which have had, and will continue to have, an impact on the lives of not just those who cross the border, but everyone on the island of Ireland and further afield. While it is still not possible, and may not be possible for some time, to judge the impact that Covid-19 has had on the Border Region, it is clear that support will be need for cross border workers and employers as they look to continue to operate on a cross border basis.

Executive Summary

This report provides updated, tangible information on cross border activity in the Ireland – Northern Ireland region and builds upon 2019’s EURES Ireland/Northern Ireland Cross-Border Partnership report “Cross Border Labour Market Movement and Skills Gaps on the Island of Ireland”. It is intended to assist the EURES Ireland/Northern Ireland Cross Border Partnership 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. In line with best practice, information has been gained from the reputable sources that provide such information, mainly - the Central Statistics Office (CSO) in the Republic of Ireland and the Northern Ireland Statistics and Research Agency (NISRA) in Northern Ireland.

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

- Almost 20% (19.7%) of the population of the island of Ireland is resident in the Northern Ireland-Ireland border region, with a higher percentage of the population aged 0-16 than the overall percentage within the two jurisdictions.
- Close to 20% (19.2%) of registered businesses on the island of Ireland are located in the Northern Ireland-Ireland border region, with smaller businesses employing fewer than ten people predominating, but with a significant presence of larger employers.
- In 2020 70.8% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five NUTS 3 (The Nomenclature of territorial units for statistics, abbreviated NUTS is a geographical nomenclature subdividing the economic territory of the European Union (EU) into regions at three different levels (NUTS 1, 2 and 3 respectively, moving from larger to smaller territorial units).¹ areas adjoining the border, which also contained 59.1% of all construction businesses, 51.6% of all transport and storage businesses, 55.1% of all production businesses, and 48.9% of all retail businesses. In contrast, the same areas only contained 27.1% of all information and communication businesses, and 36.7% of all professional, scientific and technical businesses.
- There was a significant decrease in the number of transport and storage businesses operating in the border region.
- The service sector employs the largest number of people in the Northern-Ireland Ireland border region which is reflective of the island as a whole.
- The vast majority of businesses responding to the EURES Ireland-Northern Ireland Cross Border Partnership survey were located in the border region and 75% employed staff from the opposite jurisdiction.
- Among those businesses surveyed, the most frequent obstacle to recruitment, both within and outside their own jurisdiction was uncertainty relating to Covid-19.
- Recurring themes in businesses’ responses to the survey were difficulties in attracting candidates with the necessary skills and qualifications along with wage expectations.

¹ European Commission, [Glossary: Nomenclature of territorial units for statistics](#)

- The EURES survey also revealed concerns regarding the future recruitment of cross-border workers due to the UK's departure from the European Union as the transition period ends.
- All of the LGDs/NUTS 3 (The LGDs are unitary administrations responsible for all areas of local government)² areas in Northern Ireland within the border region remain 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 continues to be 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 continue to be 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.
- The five LGDs/NUTS 3 areas in Northern Ireland border area were responsible for 45% of all claims to either the Corona Virus Job Retention Scheme or the Self-Employed Income Support Scheme in at the end of July 2020.
- Payments from the Pandemic Unemployment Payment or Temporary Wage Subsidy Scheme accounted to those in the six border counties in the Republic of Ireland accounted for 11.3% of all payments in the Republic of Ireland at the end of July 2020.
- Governmental Covid Support Payments to those in the Northern Ireland-Ireland border region accounted for 24.3% of all payments on the island of Ireland at the end of July 2020.
- The Claimant Count for Northern Ireland has recorded a year-on-year increase of 2.5% in November 2020, rising to 5.0%, over double the level for the same period from the previous year.

² Office of National Statistics, [Detailed information on the administrative structure within Northern Ireland.](#)

Introduction

The overarching purpose of this report, which is the second of its kind, is to provide up-to-date and tangible information on cross-border activity in the Northern Ireland-Ireland region that will assist the EURES Ireland/Northern Ireland Cross-Border Partnership 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.³ 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 second yearly report from the EURES Ireland/Northern Ireland Cross-Border Partnership following “Cross Border Labour Market Movement and Skills Gaps on the Island of Ireland” which was produced in 2019. While this report will broadly follow the same structure and aims of this first report, providing an updated picture of cross-border activity, it will also, where possible given the availability of up-to-date information, try to provide material on the impact of Covid-19 within the border regions and its effect on cross-border workers and employers.

There have also been previous analyses from a cross-border or all-island perspective, indeed this report relies on this previous 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, 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”.⁴

More recently, the Department for the Economy in Northern Ireland produced “Background Evidence on the Movement of People across the Northern Ireland-Ireland Border”. This report, produced in March 2019, has an intentional cross-border approach to its gathering and analysis of data, which not only includes information on cross-border commuters, but goes 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.

As well as its regular and ongoing provision of relevant information to its clients and stakeholders, 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

³ This report has been authored by Mark McClatchey, Centre for Cross Border Studies.

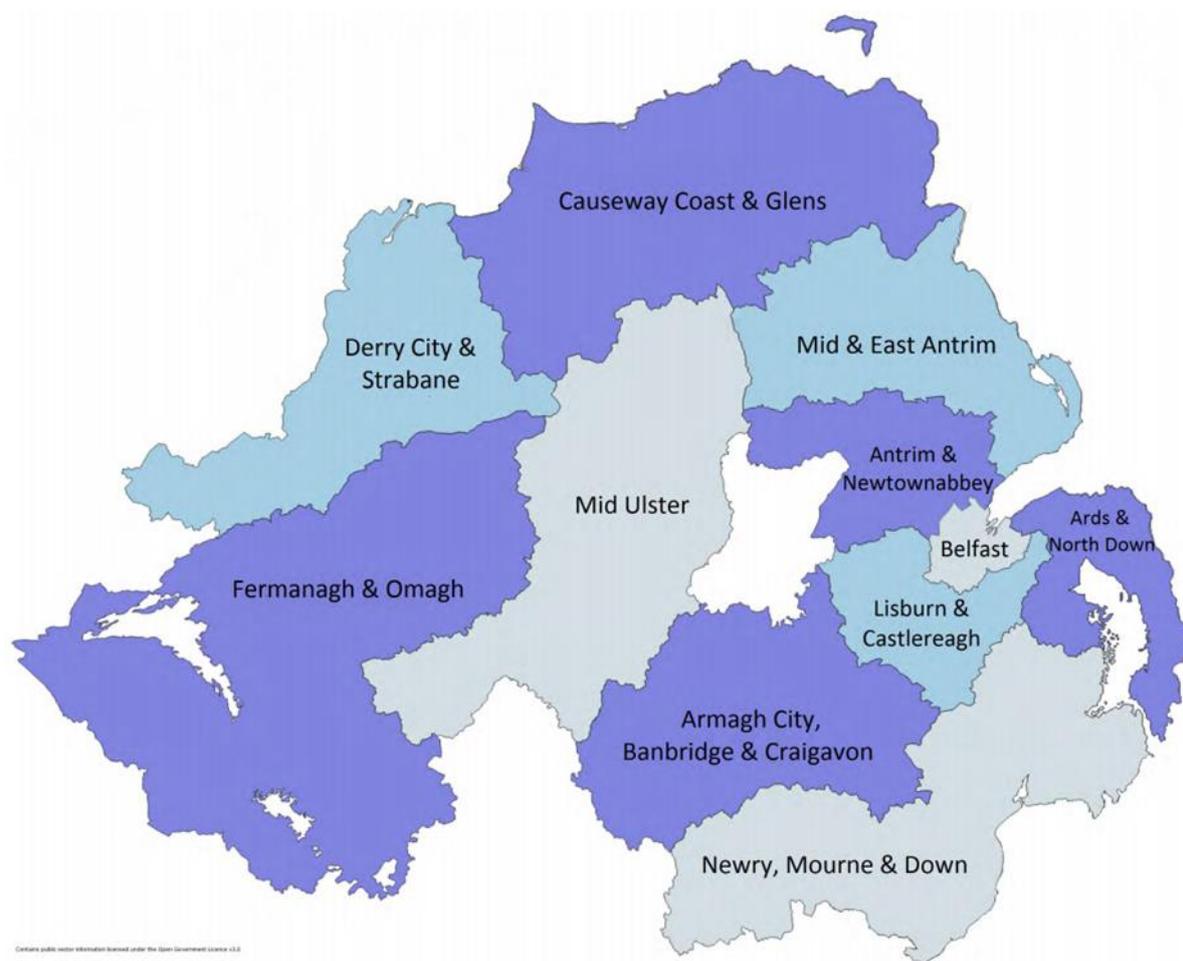
⁴ CSO and NISRA, [“Census 2011: Ireland and Northern Ireland”](#) (June 2014), p.5.

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).

Northern Ireland/ Republic of Ireland border to work” (p.5), and therefore was limited in its geographical scope.

Much like the first edition of this series, this report aims to address cross-border mobility within a wider geographical space that includes all of Northern Ireland and the border counties of Ireland. Which, in terms of the areas of analysis in Northern Ireland, 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 Councils

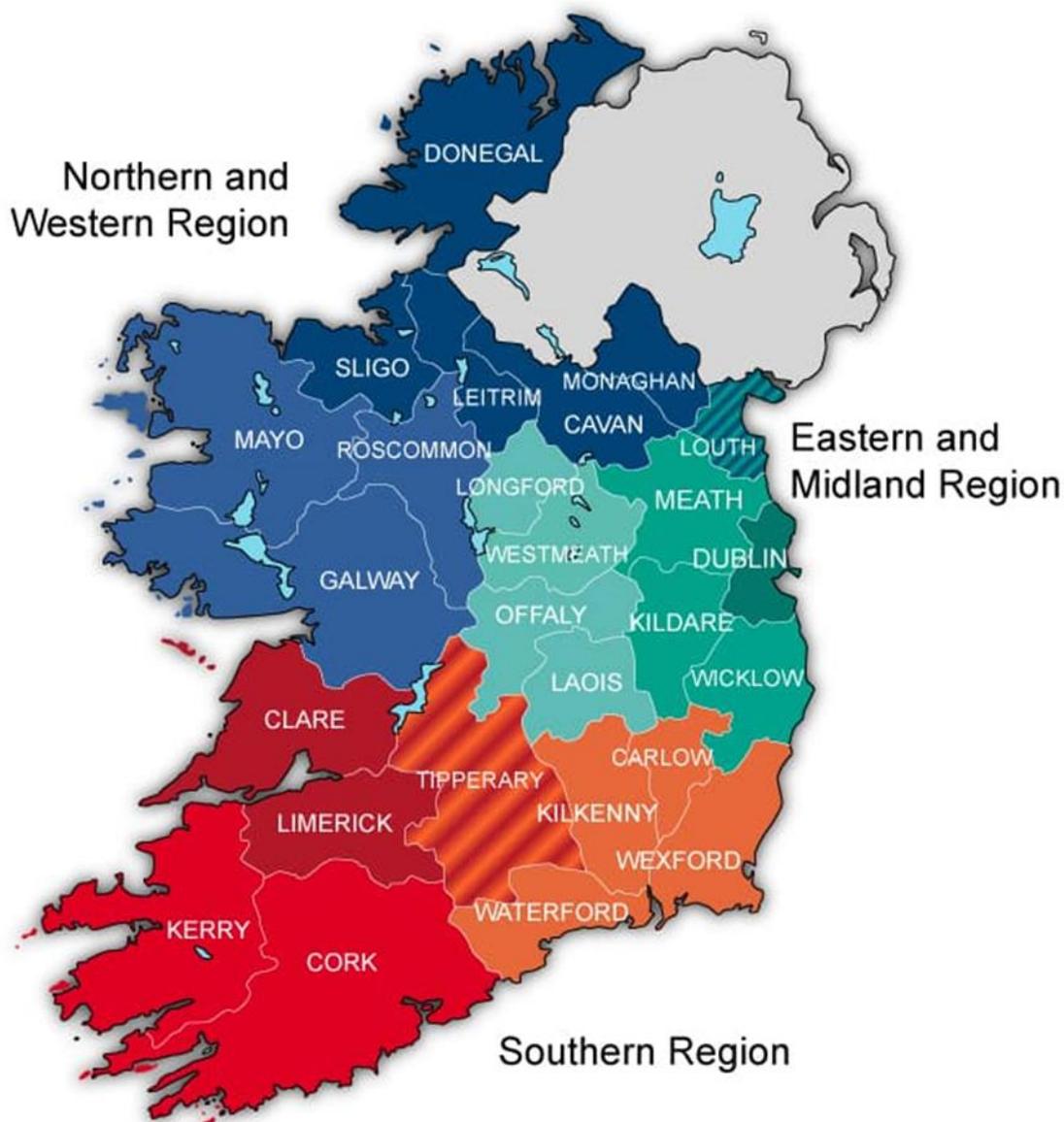


In relation to the Republic of Ireland, the main areas of interest this report are those counties located within the border region, specifically: Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo. It should be noted that these counties fall under two Irish administrative NUTS III areas. Five of the counties are make up the Border NUTS 3 region: Cavan, Donegal, Leitrim, Monaghan and Sligo; while Louth is located within the Mid-East region along with the non-border counties of Kildare, Meath and Wicklow. The NUTS III regions are in turn part of three

⁶ Department for Communities, [Map of Northern Ireland Councils](#)

Regional Assemblies, which are equivalent to NUTS II areas: Northern & Western, Southern, and Eastern & Midland. (shown in below in Map 2)^{7,8}

Map 2: Regional Assemblies (Nuts 2) in Ireland

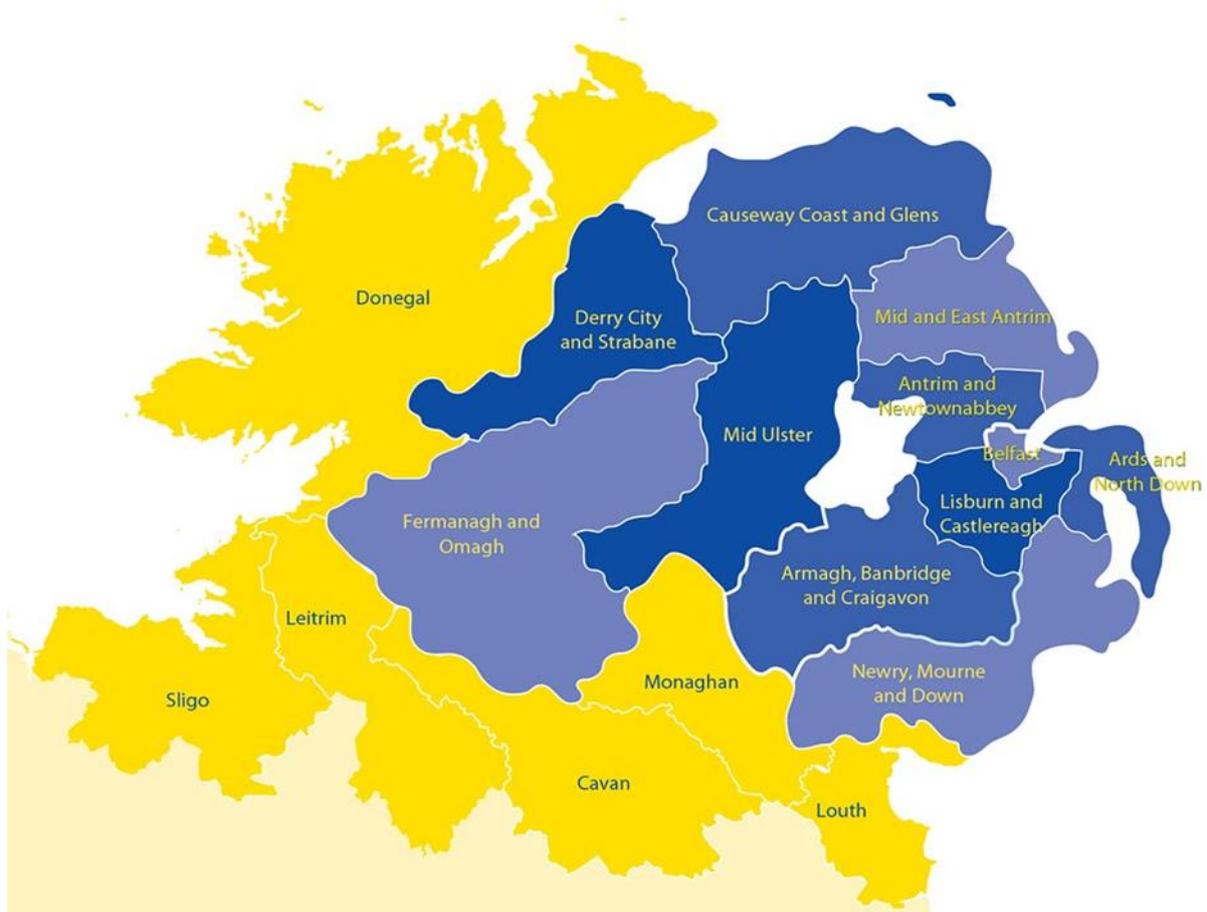


So, while this report will also provide statistics from at a national and regional level, these will be to provide context for the border region. The particular area of focus will be on the NUTS 3 regions, local government districts, and counties relating to the Northern Ireland-Ireland border region.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

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](#).

⁹ SEUPB, [“PEACE IV Programme Overview”](#).

Map 3: NI Councils & RoI Counties

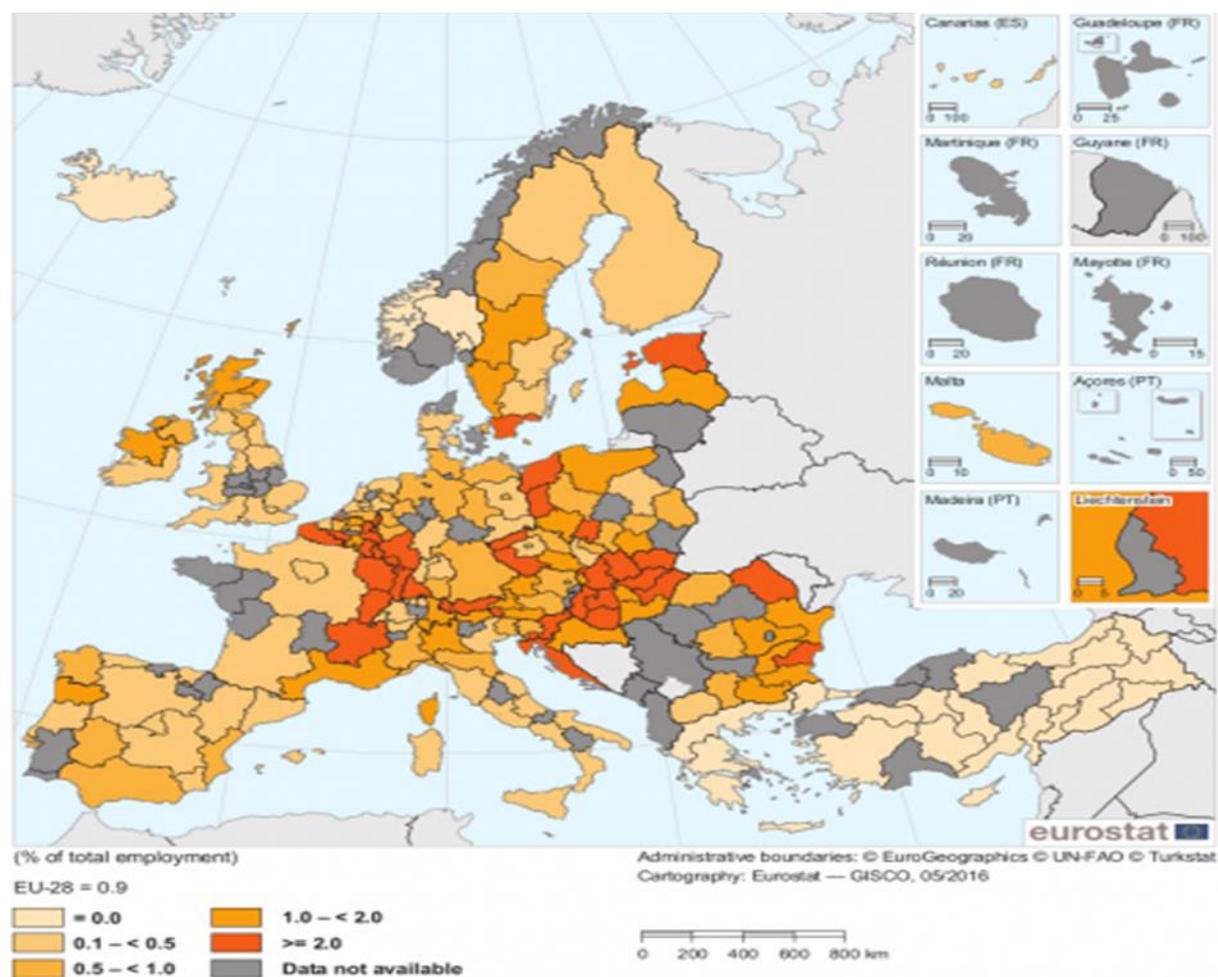
What follows in this report then, is an overview of the context in which cross-border mobility takes place on the island of Ireland, beginning with key population statistics for the Northern Ireland-Ireland border region and how these fit within their respective jurisdictional landscapes, as well as within the wider canvas provided by the European Union. We then offer 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 the EURES Cross-Border Partnership. But before doing so, it is important to address a major (and ongoing) challenge to a statistical analysis from a cross-border perspective.

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 discussing the issue, and the numbers 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” (p.5). 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]” (p.4).

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”.¹⁰

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



¹⁰ AEBR, “[Information services for cross-border workers in European border regions](#)” (October 2012), p.1.

Nevertheless, a recent report for the European Commission put the figure of cross-border workers in the EU in 2018 as comprising 1.5 million,¹¹ and this is simply an example of an analyses 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.¹² 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.

But again, we return to the reason why categorical statements regarding the numbers of citizens involved in cross-border mobility in this geographical space must be avoided. 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" (p.6).

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" (p.18). 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" (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. This is often due to differences in how and when data is collected on the two sides of

¹¹ European Commission, "[2019 annual report on intra-EU labour mobility](#)" (January 2020): "In 2018, there were 1.5 million cross-border workers in the EU" (p.12); "In 2018, the total number of workers residing in one EU Member State and working in another one was 1,475,000, a 2% increase on 2017 continuing the annual growth scale between 2016 and 2017. Additionally, 376,000 workers were residing in an EU Member State and working in an EFTA country" (p.77).

¹² Eurostat, "[Share of total employment commuting across national borders, by NUTS 2 regions](#)",

the border, which although usually minor in nature nevertheless mean a degree of caution is always necessary. Despite these difficulties, we can reach a good degree of understanding 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

The following section will briefly set out the context in which cross-border mobility takes place, highlighting the drivers encouraging such mobility, and the obstacles that may hinder it. It will begin by highlighting the framework for mobility across borders provided by the European Union, which is one that is currently shared by both Ireland and the United Kingdom but will be until the 31st December 2020, and that offers a number of safeguards to those enacting their right to freedom of movement across the Northern Ireland-Ireland border. From that EU landscape we will also draw on some of the most common obstacles to cross-border mobility, and note some of the instruments employed to address them. Having noted the principal contours of cross-border mobility within the wider EU context, we will then consider the extent to which these are replicated in the Northern Ireland-Ireland context, and note any specific drivers to this mobility on the island of Ireland.

The EU context for cross-border mobility

The right of free movement of its citizens across internal borders is one that is enshrined in the core treaties of the European Union. While the free movement of workers is guaranteed to EU citizens in Article 45 of the Treaty on the Functioning of the European Union (TFEU),¹³ Article 21 of the Maastricht Treaty would expand the principle of the right to move and reside freely within the EU to all its citizens and their family members.¹⁴ Allied and in some senses underpinning these overarching rights of free movement is the principle of non-discrimination based on nationality set out in Article 18 of the TFEU,¹⁵ as well as Article 21(2) of the Charter of Fundamental Rights of the European Union.¹⁶ Having exercised their right to move within the EU, its citizens are therefore protected from being treated in a discriminatory manner by any host Member State based on nationality.

¹³ Article 45(1) of the [Treaty on the Functioning of the European Union](#) states “Freedom of movement for workers shall be guaranteed within the Union”, while Article 45(2) declares: “Such freedom of movement shall entail the abolition of any discrimination based on nationality between workers of the Member States as regards employment, remuneration and other conditions of work and employment”.

¹⁴ The Maastricht Treaty meant the TFEU would now reflect the wider right of freedom of movement in Article 21(1), which states: “Every citizen of the Union shall have the right to move and reside freely within the territory of the Member States, subject to the limitations and conditions laid down in the Treaties and by the measures adopted to give them effect”.

¹⁵ Article 18 of the TFEU declares: “Within the scope of application of the Treaties, and without prejudice to any special provisions contained therein, any discrimination on grounds of nationality shall be prohibited”.

¹⁶ Article 21(2) of the [Charter of Fundamental Rights of the European Union](#) states: “Any discrimination based on any ground such as sex, race, colour, ethnic or social origin, genetic features, language, religion or belief, political or any other opinion, membership of a national minority, property, birth, disability, age or sexual orientation shall be prohibited”.

To ensure the practical effect across its Member States of the rights enshrined in the EU Treaties, various items of secondary legislation have sought to consolidate the free movement of persons as a cornerstone of the Union's Internal Market.

Thus, for example, Regulation 883/2004 set out rules on the coordination of social security systems between Member States in order to – among other things – ensure that movement for the purposes of employment does not affect the payment of social security due to citizens as they move between Member States.¹⁷ Directive 2004/38/EC, meanwhile, underlined that the right of free movement of EU citizens “be also granted to their family members, irrespective of nationality”.¹⁸ Alongside such regulations on free movement, the EU has also developed a range of measures to create an environment conducive to citizen mobility. These include the European Health Insurance Card,¹⁹ the directive safeguarding patients' rights in cross-border healthcare,²⁰ and the recognition of professional qualifications.²¹

In terms of the mobility of cross-border workers specifically (rather than other forms of mobility, including long-term worker mobility or posted workers), the 1.5 million EU citizens engaged in such mobility in 2018 represent 0.8% of the total labour force of the EU's 28 Member States, and according to the “2019 annual report on intra-EU mobility” the number of cross-border workers has increased by 2% on 2017 (p.77).

The 2019 report on “Employment barriers in border regions” undertaken for the European Parliament sets out the principal factors influencing the scale of cross-border mobility across the EU as stemming from socio-economic differentials, and labour market conditions:

“Cross-border commuting therefore appears to follow an asymmetrical pattern given that the greater the difference in average earnings or in the availability of jobs between two regions, the more likely it is that the region with better labour market conditions will draw in more cross-border commuters. Ultimately an attractive labour market on the other side of the border has a stronger “pull-effect” than “push-factors” experienced in a country of residence such as low employment rates or recession; in sum it is the prospect of something better that makes people choose to work across the border rather than poor conditions in their own country that “push” them away” (p.14; emphasis in the original).

The European Parliament's report also draws on work undertaken by the French Commissariat Général à l'Egalité des Territoires (CGET), which developed a typology of border

¹⁷ [REGULATION \(EC\) No 883/2004 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 29 April 2004 on the coordination of social security systems.](#)

¹⁸ [DIRECTIVE 2004/38/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 29 April 2004 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States amending Regulation \(EEC\) No 1612/68 and repealing Directives 64/221/EEC, 68/360/EEC, 72/194/EEC, 73/148/EEC, 75/34/EEC, 75/35/EEC, 90/364/EEC, 90/365/EEC and 93/96/EEC.](#)

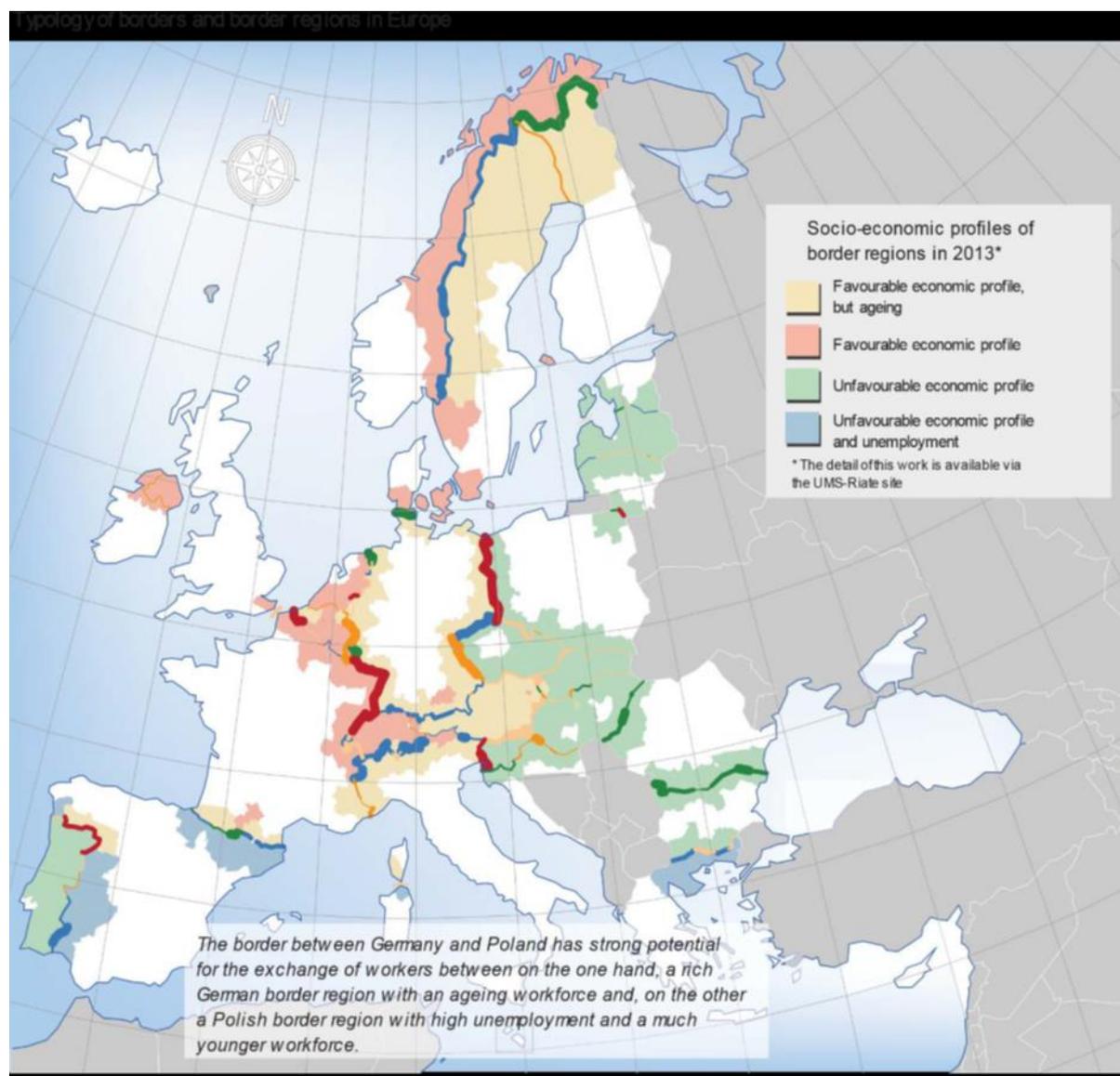
¹⁹ For more detail on the European Health Insurance Card, see <https://ec.europa.eu/social/main.jsp?langId=en&catId=559&>.

²⁰ [DIRECTIVE 2011/24/EU OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 9 March 2011 on the application of patients' rights in cross-border healthcare.](#)

²¹ [DIRECTIVE 2005/36/EC OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 7 September 2005 on the recognition of professional qualifications.](#)

regions as a way to assess how likely cross-border movement is across various borders. This allowed for a mapping of the conditions for cross-border commuting across the EU, where the Northern Ireland-border region is seen as having a favourable economic profile for such mobility.²²

Map 5: Typology of borders and border regions in Europe



²² [“Employment barriers in border regions”](#), p.13. The map included in the study for the European Parliament is a simplified version, and translated from French by its authors, of a map included in the Observatoire des Territoires’ 2017 report [“Regards sur les Territoires”](#). See also RiATE’s [“Typologie Socio-Économique des Régions Frontalières de l’Union Européenne \(2000-2012\)”](#) (February 2016).

However, cross-border mobility can be hampered by a range of obstacles with varying incidence across the EU. In 2012 the Association of European Border Regions (AEBR) highlighted the following as issues relating to cross-border labour mobility:²³

- Differences in social security and tax systems
- Diverging application of EU regulations by agencies across Member States
- Lack of relevant statistical data
- Insufficient command of the language of the neighbouring country
- Prejudices and insecurities about the working conditions in a neighbouring country, and fear of discrimination
- Mutual recognition of qualifications
- Lack of sufficient information and transparency on the principles governing the labour market.
- Differing currencies and fluctuations in their values can be an important factor in cross-border mobility particularly for those working in the opposite jurisdiction.

More recently, a large-scale study by the European Commission looked at the legal and administrative obstacles at 37 out of 40 of the EU's internal land borders. It compiled 239 cases of legal and administrative obstacles, representing an inventory that is "an empirical, partial and time-dependent 'snapshot' of a specific situation prevailing in the period 2011-2015".²⁴ In this study the policy areas relating to cross-border mobility most affected by legal and administrative obstacles were:

- Labour Market & Education: "Mobility of cross-border workers", "Mobility of trainees, students and teachers" and "Recognition of diploma or professional qualification certificates".
- Social Security & Health: "Access to social insurance system" and "Access to health care services and medical treatment".
- Transport & Mobility: "Public transport by bus, rail, light rail or metro" and "Scope and quality of regional/local and cross-border transport infrastructures and of related maintenance services".
- Industry & Trade: "Exporting of goods and cross-border provision of commercial services, including e-commerce".
- Policy Planning & Public Services: "Emergency and rescue services".
- Environment: "Protection and management of natural resources".²⁵

²³ AEBR, "[Information services for cross-border workers in European border regions](#)", pp.15-17.

²⁴ European Commission, "[Easing legal and administrative obstacles in EU border regions: Final Report](#)", p.5.

²⁵ "[Easing legal and administrative obstacles in EU border regions: Final Report](#)", p.19.

The origins of a majority of the obstacles identified lie within Member States themselves, where national or regional legislation hinders cross-border mobility, with other obstacles arising from an unwillingness at administrative level to address problems in a cross-border context. Therefore, the European Commission study concludes that “a removal or alleviation of the majority of registered border obstacles primarily requires action within and between Member States” (p.34).

Nevertheless, as well as providing legislative measures to overcome many of these obstacles, the European Union has developed a number of supportive instruments, including the proposed European Cross-Border Mechanism.²⁶ The European Commission’s formal proposal for regulation to introduce such a mechanism, which would be employed by interested Member States on a voluntary basis, sets out how it would help in addressing cross-border obstacles, by making available:

“a mechanism to apply, for a common cross-border region, in a given Member State, the legal provisions from the neighbouring Member State if applying its own laws would present a legal obstacle to implementing a joint project (which might be an item of infrastructure or any service of general economic interest)”.²⁷

Of course, among many other supports provided by the European Union to address legal and administrative obstacles in border regions, and in particular those affecting labour mobility, is the EURES Network. The study for the European Parliament on employment barriers in border regions identifies, for example, how “Cross-border partnerships are also a key aspect of EURES wherein networks are established to help workers overcome barriers to working across borders”.²⁸ This is one of the core reasons why the EURES Ireland/Northern Ireland Cross-Border Partnership was created, and why it has commissioned the present study.

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

Currently underpinning much of the context for cross-border mobility on the island of Ireland are the frameworks, legislation, funding programmes and relevant instruments derived from Ireland and the UK’s common membership of the European Union. However, with the UK’s departure from the EU and the transition period coming to an end on the 31st December 2020, cross-border mobility will take place under a new light. The Withdrawal Agreement and the Northern Ireland Protocol have ensured 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 that the Common Travel Area, and associated rights, will continue to be enjoyed by British and Irish citizens have removed a lot of the problematic issues for those who cross the border regularly.

²⁶ For an overview of this see the European Commission’s [“European Cross-Border Mechanism: a practical explanation”](#).

²⁷ [Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on a mechanism to resolve legal and administrative obstacles in a cross-border context](#).

²⁸ [“Employment barriers in border regions”](#), pp.26-27.

These 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 can 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 competence of the Administrations, North and South”.²⁹ 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.

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 other 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 – a European Territorial Cooperation programme that is in itself unique to the island of Ireland – 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”.³⁰

Covid-19 and Cross Border Mobility

Unlike national borders between some EU member states, there has not been a wholesale closure of the Northern Ireland-Ireland border, ensuring the flows of cross-border labour mobility have been most immediately affected by the relative impact of the introduction of public health measures by each jurisdiction on economic activity. In other words, cross-border

²⁹ <https://www.gov.uk/government/publications/the-belfast-agreement>.

³⁰ SEUPB, [PEACE IV Cooperation Programme](#), p.7.

workers have been affected dependent, in the first instance, if their place of work was considered to be delivering an essential service by the jurisdiction in which it is located or, more latterly, whether it was included in the sectors of economic activity allowed to reopen as public health measures were eased. As we will see later in this report, some businesses responding to the EURES Ireland/Northern Ireland Cross-Border Partnership Survey stated that they were able to increase production and, consequently, their workforce as demand increased.

The impact can also be felt differently according to the particular concentration of an activity within part of the cross-border territory, such as health and education in the North West of the island of Ireland. A survey of four Chambers of Commerce located in the Northern Ireland-Ireland border region, undertaken by the Centre for Cross Border Studies into the impact of Covid-19 in the border region, highlighted how the respondents considered that the crisis had had an adverse impact on cross-border businesses due to their reliance on cross-border trade and supply chains. The virus has also impacted on those businesses located in the border region that whilst not involved in cross-border supply chains, have nevertheless suffered a drop in trade as clients from the opposite jurisdiction refrained from travel.³¹

Citizens' ability, therefore, to continue to cross the border for purposes of work has been dependent on the extent to which their area of activity has been affected by public health measures introduced in the relevant jurisdiction, and not by the introduction of any controls at the border. Moreover, neither government has introduced any requirement for cross-border workers to carry specific documentation to prove that their place of work is delivering an approved service.

The UK and Irish governments reacted to the pandemic by putting in place supports for businesses and workers including the different supports available to cross-border workers. The UK Government announced the creation of the Coronavirus Job Retention Scheme (CJRS), and equivalent schemes – the Covid-19 Temporary Wage Subsidy Scheme (TWSS) and the Pandemic Unemployment Payment (PUP) announced by the Irish Government. Both the CJRS and TWSS allowed businesses to obtain support for furloughed cross-border workers. Cross-border workers resident in the Republic of Ireland were able to avail of the PUP scheme.

The Centre for Cross Border Studies reports a decrease in cross-border traffic, with 3,882,291 less journeys recorded in the first 6 months of 2020 compared to the same period from 2019 as both jurisdictions on the island went into lockdown and workers across the island of Ireland were told to work from home where possible by the governments in the respective jurisdictions.³² There is no doubt that cross-border mobility on the island of Ireland has been affected by the Covid pandemic, however, the full extent of the impact of the virus in the Northern Ireland-Ireland border region may not be known for some time to come.

³¹ Centre for Cross Border Studies, [“The Impact of the Corona crisis on the Northern Ireland-Ireland cross-border territory and the cross-border alignment of responses”](#) (20 November 2020)

³² Centre for Cross Border Studies, [“The Impact of COVID-19 on Cross-Border Movement on the island of Ireland”](#), (August 2020). The data was taken from a total of 12 TTI traffic counters located in close proximity to the Northern Ireland/Ireland border.

EURES

EURES is a cooperation network designed to facilitate the free movement of workers within the EU 28 countries plus Switzerland, Iceland, Liechtenstein and Norway to look for and take up a job.

The network is composed of: the European Coordination Office (ECO), the National Coordination Offices (NCOs), EURES Partners and the Associate EURES Partners.

Partners in the network may include Public Employment Services (PES), Private employment services (PRES), trade unions, employers' organisations and other relevant actors in the labour market. The partners provide information, placement and recruitment services to employers and jobseekers whereas the European and National Coordination Offices oversee the organisation of the activities at European and national level respectively.

Moreover, EURES has an important role to play in providing specific information and facilitate placements for the benefit of employers and frontier workers in European cross-border regions.

The European Union's principle of free movement of workers is considered one of the most important rights of EU citizens. It means that you can move to any EU Member State, as well as Iceland, Liechtenstein, Norway, Switzerland to look for and take up a job.

Yet, it may sometimes seem like a daunting and difficult task to make use of this right. The purpose of EURES is to help and support jobseekers and employers with that.

This involves the provision of a broad range of services, available on the EURES portal or through the vast human network of more than a thousand advisers working in the EURES Member and Partner organisations.

EURES services to jobseekers and employers include:

- Matching of job vacancies and CVs on the EURES portal
- Information and guidance and other support services for workers and employers
- Access to information on living and working conditions in the EU member states, such as taxation, pensions, health insurance and social security.
- Specific support services for frontier workers and employers in cross-border regions
- Support to specific groups in the context of EURES targeted job mobility schemes, such as Your first EURES job and Reactivate
- Promotion of youth opportunities via Drop'pin@EURES, the place where companies and organisations can promote and showcase their youth opportunities designed to help young Europeans take their first steps into the labour market.
- Support to dynamic recruitment events through the European (Online) Job Days platform
- Information on and access to post-recruitment assistance, such as language training and support with integration in the destination country

The EURES Ireland-Northern Ireland Cross-Border Partnership

The EURES Cross Border Partnership Ireland – Northern Ireland is an alliance consisting of representatives from the Employment Services Northern Ireland (DfC) the Employment Services from the Republic of Ireland (Department of Social Protection, DSP), 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 from NI and Dundalk Chamber from Republic of Ireland), The Confederation of British Industry (CBI in NI) and Irish Business and Employers' Confederation (IBEC in the Republic of Ireland).

The main objective of the EURES Cross Border Partnership Ireland – Northern Ireland is to offer employment services to existing and potential workers and employers in the cross border region, through promoting the benefits of cross border labour mobility and improving awareness of job opportunities (and career development) and by encouraging employers to see the potential of having access to a larger cross border labour market. The partnership has a mission statement which states;

'Our aim is to support frontier and cross border workers, jobseekers and employers in the Ireland/Northern Ireland Border region. We do this by raising and improving awareness of cross border living and working conditions, the cross border labour market and the benefits of mobility. We help employers, workers, jobseekers and job changers in this Border region to capitalise on the opportunities offered through their access to a cross border labour market in the border region of the Island of Ireland and the free recruitment and support service that the EURES Cross Border Partnership and the wider EURES European network can provide.'

The EURES Cross Border Partnership in Ireland – Northern Ireland has been in existence for over 20 years and is seen as a key contributor to the lives of the cross border worker, jobseeker and employer. It aims to address imbalances for our 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 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 produced 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 EURES Cross Border Partnership Ireland – N Ireland include:

- Frontier workers in the region
- Employers in the region experiencing skills shortages
- Jobseekers in the border counties
- SME's 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.

The work of the EURES Cross Border Partnership continues to be valued by our end users and the services we provide are held in high regard. We hope this will continue for many years to come.

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), and where broader comparative data was required, the report drew on the European Union's statistical office, Eurostat. 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 used information produced by recruitment agencies, and Jobcentreonline.com, JobsIreland.ie and IrishJobs.ie.

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

In the 2019 the total population of Northern Ireland numbered 1,893,700,³³ with the population in the Republic of Ireland standing at 4,921,500,³⁴ with the total population of the Ireland of Ireland at 6,815,200. This means a year-on-year increase of 0.6% in Northern Ireland, and of 1.3% in the Republic of Ireland. This is a uniform increase from the previous year's population figures in both jurisdictions.³⁵ The main driver for Northern Ireland's population increase was natural change (up 7,300) with net migration accounting for 4,800. The opposite is true in the Republic of Ireland, where net migration was the main factor in population increase, 33,700, with the natural increase the reason for the remaining 30,800. The population of Northern Ireland comprised of 961,000 (50.7%) females and 932,700³⁶ (49.3%) male in 2019, with a similar percentage in the Republic of Ireland where the population is 50.5% female and 49.5% male.³⁷ Those populations were spread across their respective jurisdictions so that in 2016 the average population density in the Republic of Ireland was 70 persons per km²,³⁸ and 137.3 per km² in Northern Ireland.³⁹

The age profiles of the two populations in 2019 show that those aged 65 years or more make up a greater percentage of Northern Ireland's population (16.6%) than the same cohort within the population of the Republic of Ireland (14.2%), as can be seen in Chart 1 below.⁴⁰

³³ NISRA, "[NISRA Statistical Bulletin: 2019 Mid-year Population Estimates for Northern Ireland](#)" (11 June 2020)

³⁴ CSO "[Population and Migration Estimates April 2019](#)" (27 August 2019). The more recent "[Population and Migration Estimates April 2020](#)" places the total population of the Republic of Ireland at 4,977,400.

³⁵ EURES, "Cross Border Labour Market Movement and Skills Gaps on the Island of Ireland: A Statistical Analysis" (February 2020)

³⁶ NISRA, "[NISRA Statistical Bulletin: 2019 Mid-year Population Estimates for Northern Ireland](#)", p.2. (11 June 2020)

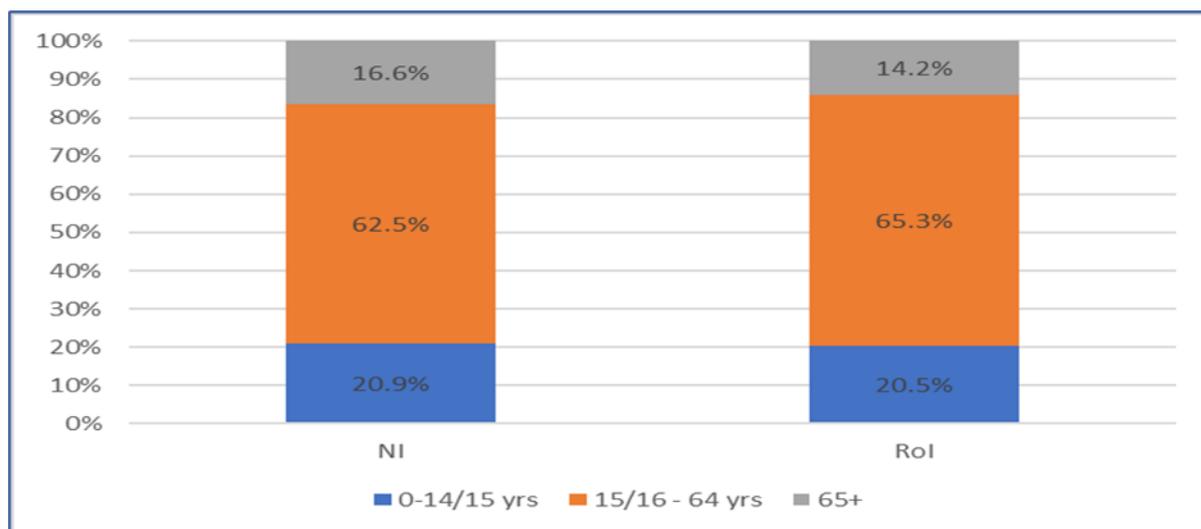
³⁷ CSO, "[Population Estimates \(Persons in April\) by Age Group, Sex and Year](#)".

³⁸ CSO, "[Regional SDGs Ireland 2017 – Population density by region, 2016](#)".

³⁹ NISRA, "[Various geographies – population densities \(1981-2016\)](#)".

⁴⁰ "[NISRA Statistical Bulletin: 2019 Mid-year Population Estimates for Northern Ireland](#)", p.5; CSO, "[Population Estimates \(Persons in April\) by Age Group, Sex and Year](#)". It is important to note that while both NISRA and the CSO employ the 65+ age category, there are minor differences in others, with NISRA using 0-15 and 16-64 years for the other age bands, and CSO using 0-14 and 15-64 years.

Chart 1: Age profiles of the populations of Northern Ireland and the Republic of Ireland (2019)



NISRA's analysis of its statistics leads to the conclusion that "Over the three decades from year ending mid-1989 to year ending mid-2019 the median age (i.e., the age at which half the population is older and half is younger) of the Northern Ireland population has increased from 30.7 to 38.9 years. It is projected that from mid-2028 onwards the older population (people aged 65 and over) will be larger than the number of children (i.e., people aged 0 to 15 years)". However, while those aged 65 and over in 2019 make up a larger percentage of the population in Northern Ireland than in the Republic of Ireland, in light of the results of the 2016 Census the CSO notes, "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".⁴¹ 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 20.3% in 2019.⁴² The percent of the population over 65 years of age in both jurisdictions on the island of Ireland is also below the UK average, which stood at 18.5% in mid-2019.⁴³

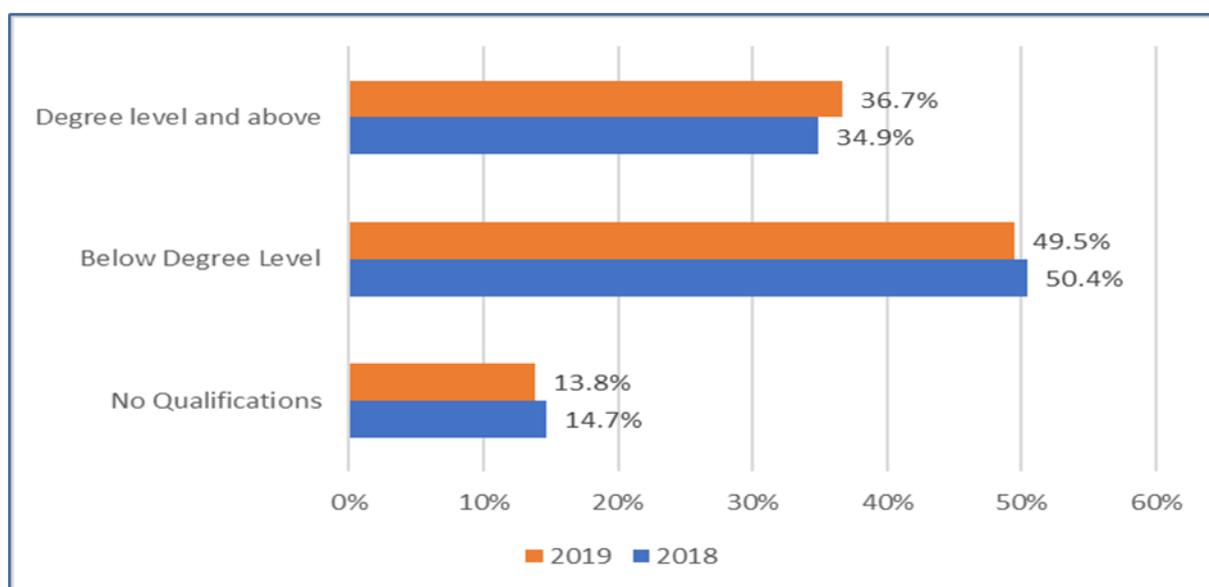
⁴¹ CSO, "[Census of Population 2016 – Profile 3 An Age Profile of Ireland: Average Age and Dependency](#)".

⁴² Eurostat, "[Proportion of population aged 65 and over](#)".

⁴³ ONS, "[Population estimates for the UK, England and Wales, Scotland and Northern Ireland: mid-2019](#)", (24 June 2020)

Of those ages 16 to 64 in Northern Ireland, 13.8% had no formal education or training qualifications, decreasing from 14.7% in 2018. Given that this statistic is based on all those considered to be part of the labour force, a more accurate figure of what could be interpreted as educational underachievement in Northern Ireland is the 8.8% of the population classed as early leavers from education and training, which while decreasing from 2018 (9.4%), is still greater than the equivalent figure of 5.1%, an increase of 0.1% from 2018.⁴⁴ The disparity between the two jurisdictions on the island of Ireland is further shown by the NISRA estimates based on the Labour Force Survey, and from which it is possible to focus on the 25 to 64 age-group, which shows 14% of this cohort as having no qualifications in 2019.⁴⁵ The largest percentage of the 16-64 age group in Northern Ireland (49.5%) achieved a qualification below degree level, with 36.7% attaining an undergraduate degree or higher.

Chart 2: Highest Qualifications Attained by those aged 16-64 in Northern Ireland (2018 & 2019)

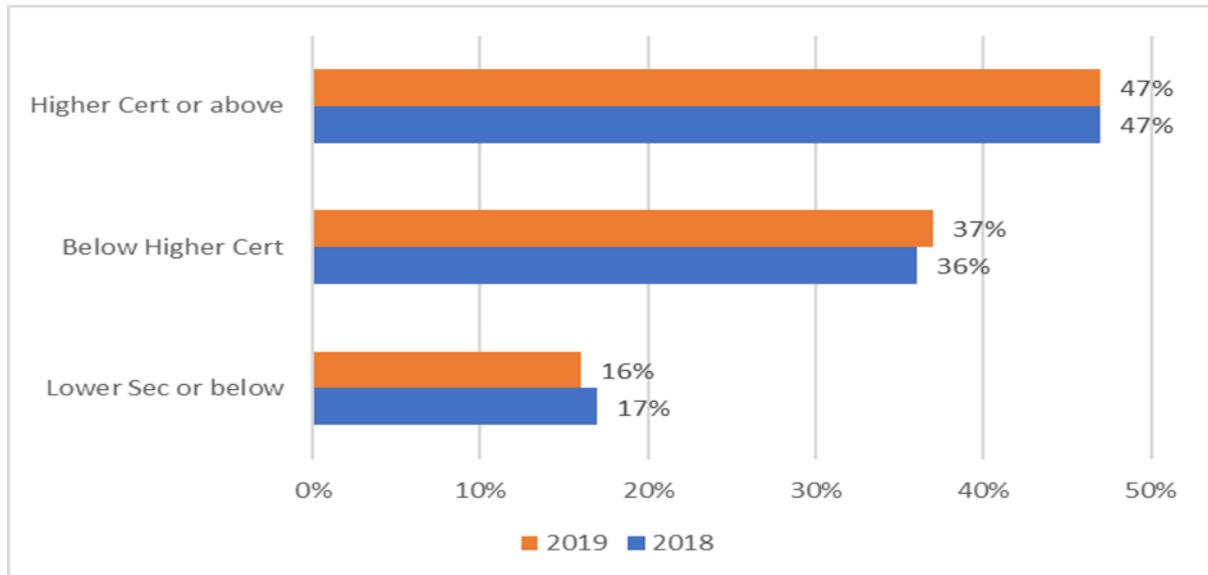


⁴⁴ Eurostat, [“Early leavers from education and training by sex and NUTS 1 regions”](#). The equivalent statistic for the EU-27 is 10.2%, while it is 10.9% for the whole of the UK.

⁴⁵ NISRA, [“LFSAR4 Qualifications 2019”](#). (1 October 2020)

For the Republic of Ireland, the highest level of education attained by those aged 25 to 64 years is shown in Chart 3 below.⁴⁶

Chart 3: Highest Level of Education Attained by those aged 25-64 in RoI (2018 & 2019)

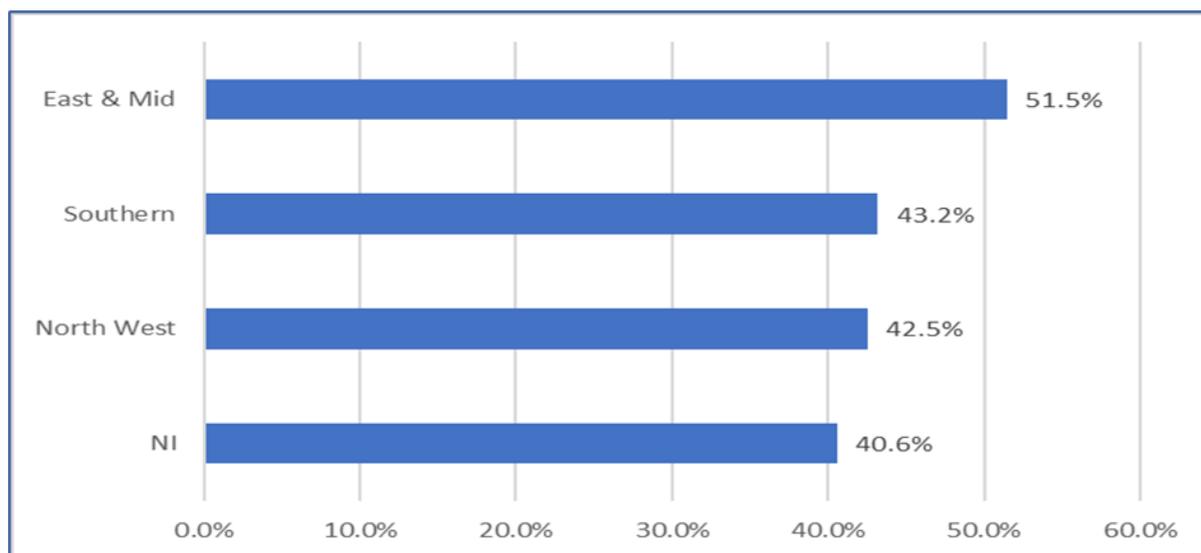


In contrast to Northern Ireland, the majority of the population (bearing in mind the different statistical age categories used in relation to the two jurisdictions) possesses a Higher Cert or above (47%) as their highest level of educational qualifications, with 37% achieving below a Higher Cert, and 16% of all 25–64-year-olds in the Republic of Ireland having a lower Sec or below level of Education.

There is a significant disparity in terms of those attaining third-level – or tertiary – education, as displayed in Chart 4.

⁴⁶ CSO, [“Persons Aged 25-64 by Nationality, Sex, Education Level and Quarter”](#).

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



According to Eurostat, in 2019, 40.6% of those aged 25 to 64 in Northern Ireland had attained a tertiary education; in all three of the Republic of Ireland’s Assembly Regions (equivalent to NUTS 2 regions) in the same year, a higher percentage of 25–64-year-olds had done the same.⁴⁷

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 2020 stood at 62%, a decrease of 0.5% from Q3 in 2019. An increase of 1.8% was witnessed in the seasonally adjusted ILO unemployment rate, which rose to 6.7% in Q3 2020 from 4.9% in Q3 2019.⁴⁸ In Northern Ireland, the employment rate for those aged 16 and over was 59.3% in 2019, a 1.3% increase from 2018 (following a 0.7% increase from 2017),⁴⁹ while the unemployment rate for those aged 16 to 64 in Quarter 3 of 2020 was 3.7%, an increase of 1.1% from 2.6% in 2019.

There is, of course, 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. Northern Ireland’s Department for the Economy estimates, for example, that there are 43 million vehicle crossings each year at 15 major crossing points, with traffic not counted at other minor crossing points, and with the northbound and southbound flows being fairly even.⁵⁰ It also reports one transport company’s (Translink, which is the main public transport provider in Northern Ireland) estimate of 900,000 cross-border coach passenger journeys in 2016/17, and a further 868,532 cross-border rail journeys between 2014/15 and 2016/17, with 40% of those travelling on the

⁴⁷ Eurostat, [“Tertiary educational attainment, age group 25-64 by sex and NUTS 2 regions”](#).

⁴⁸ CSO, [“ILO Participation and Unemployment Rates by Sex, Quarter and Statistic”](#).

⁴⁹ NISRA, [“Labour Market Structure – Employment Activity and Qualifications level by Local Government District 2009-2019”](#).

⁵⁰ Department for the Economy, [“Background Evidence on the Movement of People across the Northern Ireland-Ireland Border”](#), p.11.

Enterprise train service between Belfast and Dublin in 2016 doing so for business purposes; 41% of business travelers on the Enterprise were doing so weekly.⁵¹

However, during the Covid-19 pandemic and the related public health related restrictions traffic between the two jurisdictions reduced dramatically. The Centre for Cross Border Studies reported severe decreases in the number of cross-border bus journeys that were recorded in March (30%), April (68.6%), May (66.8%) and June (55.6%) 2020 when compared to 2019 figures.⁵²

The profile of the Northern Ireland-Ireland Border Region

The estimate for the percentage of the total population of Ireland that resides in the Northern Ireland/Ireland Border region stands at 19.7% for 2019. This is a slightly lower percentage of the island's population than in 2018, and as we can see in Table 1, comes despite the overall population in the border region increasing by 0.8%. This rate of increase in the border region is above the average rate of population growth in Northern Ireland (0.6%) but remains below that of the Republic of Ireland (1.3%).

Table 1: Population of the Northern Ireland-Ireland Border Region

	2018	2019	% Change
Border Regional Authority Area	402,800	406,700	+1
Armagh, Banbridge & Craigavon	214,100	216,241	+1
Newry, Mourne & Down	180,000	181,440	+0.8
Derry & Strabane	150,700	151,303	+0.4
Mid Ulster	147,400	148,579	+0.8
Co. Louth*	128,884	129,528	+0.5
Fermanagh & Omagh	116,800	117,384	+0.5
Total	1,340,684	1,351,175	+0.8

*The percent change for Co. Louth has been upon the average for the Mid-West region in the Republic of Ireland.

Indeed, by using the CSO's 2016 Census data to capture the rates of population growth within the Border Regional Authority's constituent counties,⁵³ we can see that County Donegal actually saw a 1.2% decrease in its population from 2011, whereas in Co. Cavan the population grew by 3.9% between 2011 and 2016.⁵⁴ The population is spread unevenly across this geographical area, with (using figures for 2016) the Republic of Ireland's Border Regional

⁵¹ ["Background Evidence on the Movement of People across the Northern Ireland-Ireland Border"](#), pp.13-14.

⁵² Centre for Cross Border Studies, ["The Impact of COVID-19 on Cross-Border Movement on the island of Ireland"](#) p.8. (August 2020). The data has been taken from a total of 12 TTI traffic counters located in close proximity to the Northern Ireland/Ireland border

⁵³ 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.

⁵⁴ The population growth in the other counties in the 2011-2016 period was: Sligo 0.2%, Leitrim 0.8%, and Monaghan 1.5%.

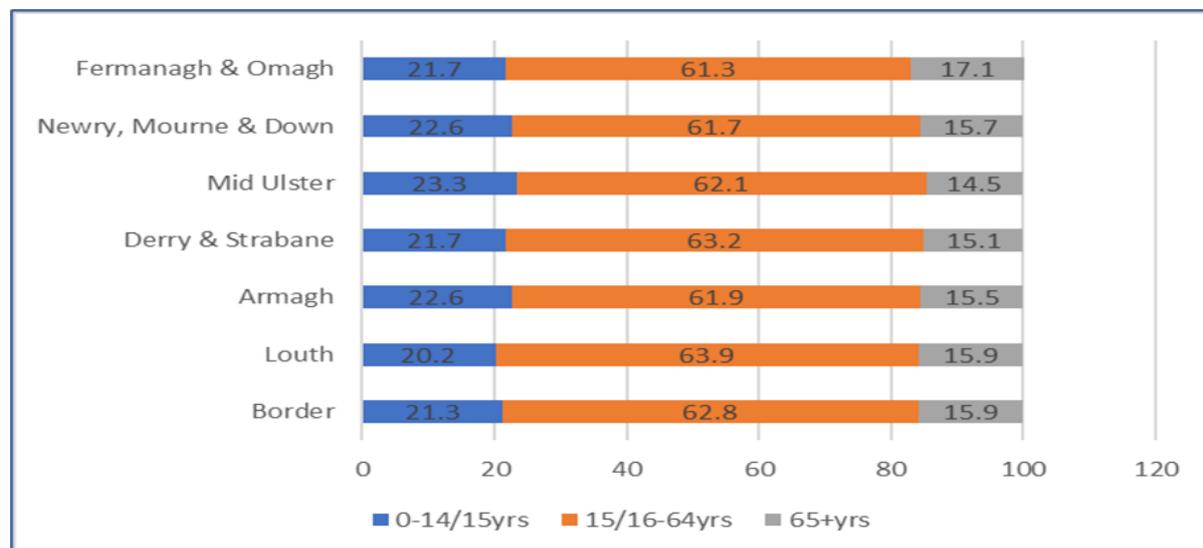
Authority Area and Fermanagh & Omagh in Northern Ireland having the lowest population densities of only 35 and 40.7 persons per square kilometre respectively,⁵⁵ and Co. Louth and Armagh City, Banbridge & Craigavon both having the highest at 156 persons per km² (Table 2). These disparities in terms of population densities can be seen as reflecting the region's predominantly rural nature, with a small number of urban clusters.

Table 2: Population densities in the Northern Ireland-Ireland border region (2016)

Armagh, Banbridge & Craigavon	156.1
Co. Louth (2016)	156
Derry & Strabane	121.3
Newry, Mourne & Down	109.8
Mid Ulster	79.8
Fermanagh & Omagh	40.7
Border Regional Authority Area	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, where in the Republic of Ireland 20.5% of the population was aged 0 to 14 in April 2019, with those aged 0 to 15 representing 20.9% of the population of Northern Ireland in June 2019. As Chart 5 shows, all of the areas within the geographical scope of this study, with the exception of Louth, had higher percentages of younger people.⁵⁶

Chart 5: Age profiles of the population of the Northern Ireland-Ireland border region, % (2019)*



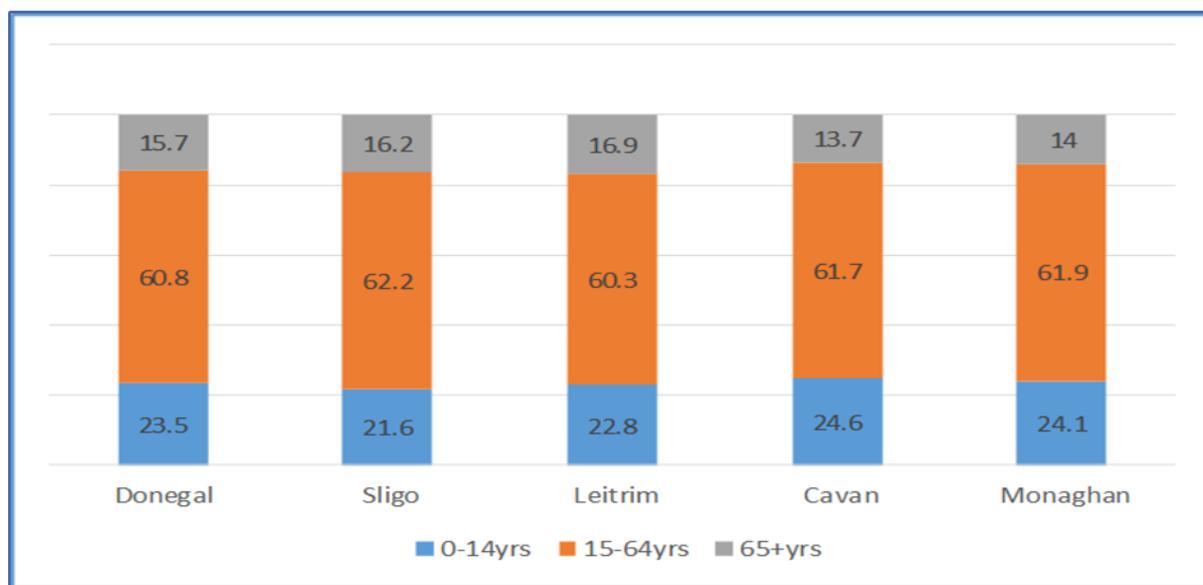
* The percent change for Co. Louth has been upon the average for the Mid-West region in the Republic of Ireland.

⁵⁵ CSO, "[Regional SDGs Ireland 2017 – Population density by region, 2016](#)" and NISRA, "[Various geographies – population densities \(1981-2016\)](#)". The source for the population density of Co. Louth was Louth County Council's "[Louth – Healthy County Plan 2018-2022](#)", p.3.

⁵⁶ "[NISRA Statistical Bulletin: 2019 Mid-year Population Estimates for Northern Ireland](#)", p.16; CSO, "[Population Estimates \(Persons in April\) by Age Group, Sex and Year](#)". While both NISRA and the CSO employ the 65+ age category, there are minor differences in others, with NISRA using 0-15 and 16-64 years for the other age bands, and CSO using 0-14 and 15-64 years.

Similar to the data for 2018, Chart 5 shows that Fermanagh & Omagh has a slightly higher percentage of those aged 65 and over than the overall figure for Northern Ireland (17.1% compared to 16.6%), which is also the case for the Border Regional Authority area in relation to the overall percentage for the Republic of Ireland (15.6% compared to 14.2%). The overall figure for those aged 65 and over in both jurisdictions has shown an increase, rising to 16.6% from 16.4% in Northern Ireland, and to 14.2% from 13.9% in the Republic of Ireland.

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



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.

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%. What can be seen here, and what remains the case in relation to the 2018 figures, is that the Northern Ireland-Ireland border region has higher percentages of both younger and older people relative to the overall population of the island of Ireland, meaning that it has a lower percentage of those aged between 15 and 64 years of age.

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 3 below,⁵⁷ where a lower percentage of those aged between 16 and 64 in all five 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 2019. Encouragingly, although remaining below the national average, the percentage of those achieving an NVQ Level 4 qualification or above has increased in all five LDGs. Of further concern is 3 of the 5 LGDs

⁵⁷ NISRA, "[Labour Market Structure – Employment Activity and Qualifications level by Local Government District 2009-2019](#)". (October 2020)

abutting the border registered a higher percentage of those aged between 16 and 64 with No Qualifications than the national average (13.8%). Despite a reduction in the overall level of those achieving No Qualifications in Northern Ireland, Derry & Strabane and Fermanagh & Omagh both saw increases, while Mid Ulster remained above the national average.

Table 3: Level of Qualifications attained by % 16 to 64 year-olds in 5 NI LGDs (2019)

	NVQ Level 4 or above	No Qualifications
Northern Ireland	36.7	13.8
Armagh, Banbridge & Craigavon	33.4	12.1
Derry & Strabane	34	17.6
Fermanagh & Omagh	29.8	18.8
Mid Ulster	34.1	17
Newry, Mourne & Down	34	13

Similarly, in Quarter 2 of 2019, 10% of those aged 25 to 64 in the Border Regional Authority area had only attained primary education (1% increase from Q2 2018), compared with 5% of the total population; while 47% of the total population in the Republic of Ireland had achieved a Higher Cert or above, only 37% had achieved this in the Border Regional Authority area.⁵⁸ As we see below this is a continuing trend.

The 2016 Census results allow us in Table 4 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.⁵⁹

Table 4: % 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 CSO, "[Persons Aged 25-64 by Region, Sex, Education Level and Quarter](#)".

⁵⁹ 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, we will 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 2018. Highlighting those abutting the border, Table 5 displays the 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.

Table 5: Employment rate of 16–64-year-olds in Northern Ireland by LDG (2019)

	2018	2019	% Change
Antrim & Newtownabbey	77.7%	77.3%	-0.4%
Lisburn & Castlereagh	76.8%	81.1%	+4.3%
Mid Ulster	74.2%	75.3%	+1.1%
Armagh, Banbridge & Craigavon	73.9%	72.3%	-1.6%
Ards & North Down	72.9%	73.1%	+0.2%
Mid & East Antrim	71.2%	74.2%	+3.0%
Northern Ireland	70.0%	71.9%	+1.9%
Fermanagh & Omagh	68.8%	65.0%	-3.8%
Newry, Mourne & Down	67.1%	73.6%	+6.5%
Causeway Coast & Glens	66.8%	67.6%	+0.8%
Belfast	64.7%	67.6%	+2.9%
Derry & Strabane	61.6%	68.0%	+6.4%

Our focus in Table 5 remains on the data for on the five Local Government District within the Northern Ireland-Ireland border region.⁶⁰ Three of these districts displayed employment rates above the Northern Ireland average of 71.9%, while the remaining two, Fermanagh &

⁶⁰ NISRA, [“Labour Market Structure – Employment Activity and Qualifications level by Local Government District 2009-2019”](#)

Omagh and Derry & Strabane fell below. However, it should be noted that Derry & Strabane did register a significant increase (6.4%) in its employment rate.

While 33,000 people in Northern Ireland were unemployed in 2019, which accounted for 3.7% of the economically active population aged 16 and over, Derry & Strabane stands out at a more local level in terms of the statistics relating to the claimant count. Table 6 shows the proportion of residents aged 16 to 64 claiming unemployment-related benefits in October 2020, ranking all eleven local government district areas from the highest to the lowest, and including the overall figure for Northern Ireland.

Table 6: Claimant Count as proportion of resident population aged 16-64 (November 2019 & 2020)

	Nov-19	Nov-20	% Change
Derry & Strabane	4.6	5.0	+0.4
Belfast	2.8	4.4	+1.6
Newry, Mourne & Down	2.3	4.6	+2.3
Northern Ireland	2.5	5.0	+2.5
Causeway Coast & Glens	3	6.3	+3.3
Mid & East Antrim	3	3.6	+0.6
Ards & North Down	2.3	5.1	+2.8
Armagh, Banbridge & Craigavon	2	4.6	+2.6
Antrim & Newtown Abbey	2.1	4.2	+2.1
Mid Ulster	1.7	4.0	+2.3
Fermanagh & Omagh	2.3	6.9	+4.9
Lisburn & Castlereagh	1.6	3.9	+2.3

As can be seen in Table 6 above,⁶¹ there has been a rise in the proportion of the Northern Ireland population aged 16 to 64 claiming unemployment-related benefits. The overall claimant count for Northern Ireland has doubled from the same figure in 2019, rising to 5.0% from 2.5%, an increase of 2.5%. Fermanagh & Omagh (6.9%) has the highest percentage of any Local Government District, recording an increase of 4.9%, from November 2019 (2.3%). The District has also recorded the largest percentage increase in Northern Ireland. Causeway Coast & Glens has the second largest percentage increase, recording a rise of 3.3% in 12 months.

Both Fermanagh & Omagh and Derry & Strabane are above the overall percentage of claimants for Northern Ireland. Armagh, Banbridge & Craigavon (4.6%), Newry, Mourne & Down (4.6%) and Mid Ulster (4.0%) while all registering significant increases, remain below the Northern Ireland average.

⁶¹ NISRA, "[Claimant Count Monthly Data](#)".

Table 7 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 2019 and 2020, and the overall national rate, ranking them from highest to lowest.⁶²

Table 7: ILO Participation Rate by NUT 3 region in the Republic of Ireland % (Q3 2019 & 2020)

	Q3 2019	Q3 2020	% Change
Dublin	66.2	65.1	-1.1
Eastern & Midland	64.9	64.2	-0.7
Mid-East	65	63.7	-1.3
West	62.4	62.3	-0.1
Republic of Ireland	62.5	62	-0.5
South-West	61.4	61.6	0.2
Midland	58.7	61.1	2.4
South-East	59.1	59.5	0.4
Mid-West	59	58.2	-0.8
Border	58.1	56.2	-1.9

The Border Regional Authority has the lowest ILO Participation rate (56.2%) for Quarter 3 of 2020 and records a year on year decrease of 1.9%. It also falls well below the national participation rate of 62%. The Mid-East region, which contains Co. Louth, has also experienced a decrease in participation from Quarter 3 in 2019, falling from 65% to 63.7%.

In order to capture the labour market at county level, Table 8 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, with the same figures at national level.⁶³

Table 8: 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%

⁶² CSO, "[Labour Force Quarterly Series/QLF08/Persons aged 15 years and over by Region, Quarter and Statistic](#)".

⁶³ 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](#)".

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, we can nevertheless gain some understanding of the levels of productivity and income within the two jurisdictions, and how the Northern Ireland-Ireland border region fares.

Table 9 sets out the Gross Value Added (GVA) produced in each of the 11 local government district areas in 2017 and 2018, ranking them from highest value of goods or services produced per person to lowest, and including the overall rate for Northern Ireland.⁶⁴ 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 9: GVA per head for NUTS 3 areas in Northern Ireland (2017 & 2018)

	2017	2018
Belfast	38,743	39,582
Mid and East Antrim	28,789	23,850
Lisburn and Castlereagh	22,105	23,421
Northern Ireland	22,541	22,428
Mid Ulster	20,982	21,981
Antrim and Newtownabbey	21,848	21,486
Fermanagh and Omagh	18,826	18,403
Derry City and Strabane	17,795	17,985
Armagh City, Banbridge and Craigavon	17,670	17,737
Newry, Mourne and Down	16,123	15,777
Causeway Coast and Glens	15,295	15,009
Ards and North Down	12,444	12,516

⁶⁴ Office for National Statistics, "[Regional gross value added \(balanced\) per head and income components](#)" (19 December 2019)

As we can see in Table 9, the 5 NUTS 3 areas which are part of the Northern Ireland-Ireland border region are below that of the overall Northern Ireland average (£22,428). Mid Ulster is the best achieving of those five areas (£21,981), with Newry, Mourne & Down the lowest ranked of the Northern Ireland border region (£15,777). As well as being below the Northern Ireland average Newry, Mourne & Down, Causeway Coast & Glens, and Ards & North Down are all included in the bottom 15 NUTS 3 areas in the UK. Belfast, as the highest rank area in Northern Ireland, is above the overall Northern Ireland GVA and is also 14th 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 2018; with the Republic's overall GVA per head standing at €62,293 in 2018 (increasing 8.1% from 2017), Dublin's was €83,990 (an increase of 13.4% on 2017). Bearing in mind that no figures are available for GVA per head for the Mid-West or South-West,⁶⁵ Table 10 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 2018.⁶⁶

Table 10: GVA per head for NUTS 3 areas in the Republic of Ireland, excluding the Mid-West and South-West (2017 & 2018)

	2017	2018	% Change
Dublin	85,136	96,518	13.4
Republic of Ireland	57,631	62,293	8.1
Mid-East	34,938	37,058	6.1
South-East	35,050	34,528	-1.5
Midland	26,643	27,561	3.4
West	24,062	24,063	0.0
Border	21,322	21,792	2.2

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 2017 and 2018, the Border Regional Authority area was the site where the value of goods or services produced per person was lowest. It is important to note that although remaining the lowest area, the Border Regional Authority area did record an increase in its GVA of 2.2% for the 2018 year. Again, it is important to remember 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.

⁶⁵ The CSO's explanation for the absence of figures for these two areas is "suppressed for reasons of confidentiality".

⁶⁶ CSO, "[Table 9c: GVA per Person at Basic Prices, 2008 to 2018](#)".

In order to reach a better understanding of the economic status of the population of the Northern Ireland-Ireland border region, given that some of it may be commuting elsewhere to work, we can look at the levels of disposable income to be found here. Table 11 sets out the gross disposable household income (GDHI) per head across the NUTS 3 areas of Northern Ireland in 2018, as estimated by the Office of National Statistics.⁶⁷

Table 11: GDHI per head (£) for NUTS 3 areas in Northern Ireland (2017 & 2018)

	2017	2018
Lisburn and Castlereagh	19,030	20,011
Ards and North Down	18,245	19,160
Mid and East Antrim	17,745	18,577
Causeway Coast and Glens	16,794	17,723
Northern Ireland	16,556	17,340
Antrim and Newtownabbey	16,677	17,213
Armagh City, Banbridge and Craigavon	16,275	17,037
Mid Ulster	16,082	16,859
Belfast	15,950	16,706
Fermanagh and Omagh	15,916	16,569
Newry, Mourne and Down	15,742	16,535
Derry City and Strabane	14,666	15,348

There are two striking features from the above table. One is that Belfast, despite being the NUTS 3 area that saw by far the highest value of goods and services being produced per person in 2017 in all of Northern Ireland (and even ranking among the top 15 in all of the UK), it is also an area where the disposable income of its population (£16,706) is lower per head than that of the overall figure for Northern Ireland (£17,340). The second is that all of Northern Ireland's NUTS 3 areas within the Northern Ireland-Ireland border region have households with lower gross disposable income per head than the Northern Ireland average. Armagh City, Banbridge and Craigavon is the highest with £17,037 per household while Derry City and Strabane is the lowest with £15,348.

⁶⁷ ONS, "[Regional gross disposable household income: all NUTS level regions 1997-2018](#)". (4 June 2020)

The levels of estimated disposable income per head across the Republic of Ireland's NUTS 3 areas in 2016 are shown in Table 12.⁶⁸

Table 12: Disposable income per person for NUTS 3 areas in the Republic of Ireland (2016 & 2017)

	2016	2017
Dublin	23,005	23,864
Mid-East	19,655	21,354
Republic of Ireland	19,660	20,714
Mid-West	19,553	20,623
South-West	19,040	19,893
Midland	16,828	19,030
South-East	18,213	18,616
West	17,447	18,306
Border	16,047	17,051

Unlike the case with Belfast in Table 11 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, and as shown above in Table 10, it also had the highest GVA per hand in 2017 (€85,136). There were only two NUTS 3 areas in the Republic of Ireland (Dublin & Mid-East) that outperformed the national average (€20,714) in 2017, compared to four areas in 2017 and five in 2018 in Northern Ireland. While the Mid-East includes Co. Louth, Table 12 shows the Border area as having the lowest disposable income per person, as was the case in 2016.

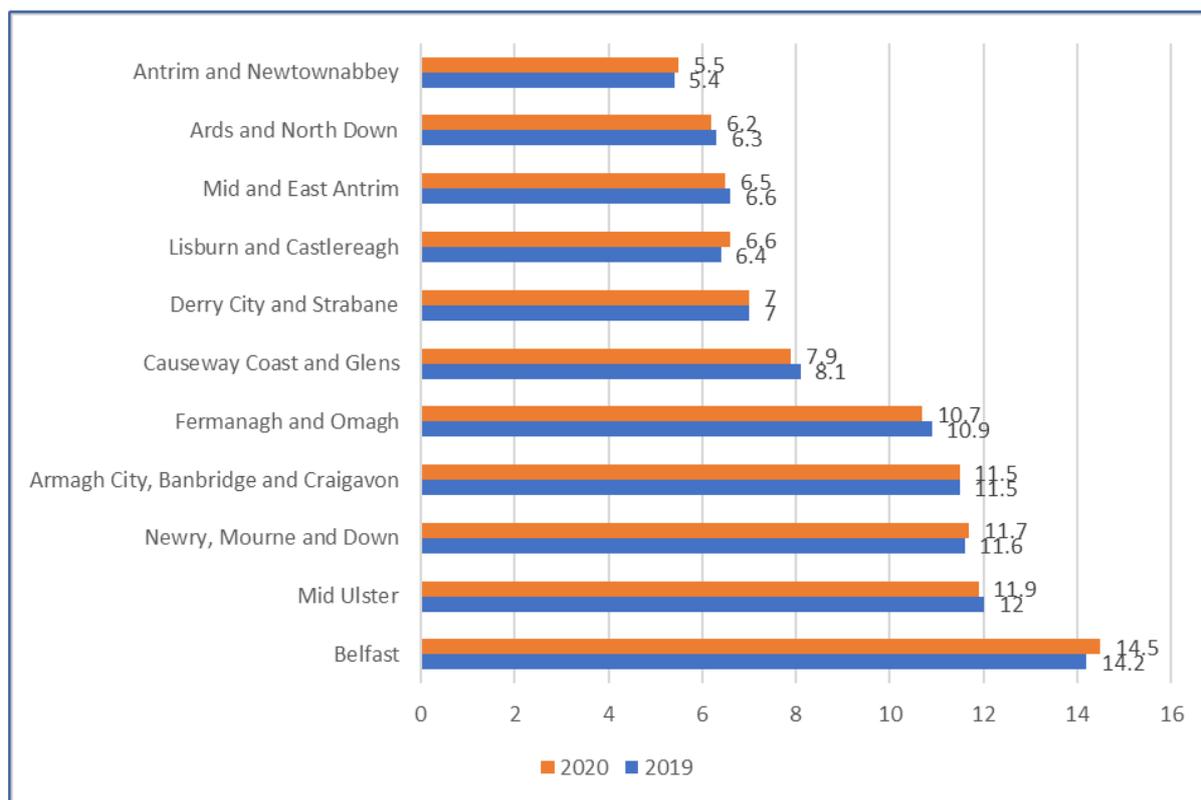
The same statistics at county level show that in 2016 Co. Donegal had the lowest levels of disposable income per person (€15,892) of all Republic of Ireland counties in the Northern Ireland-Ireland border region, with Co. Sligo having the highest (€19,277), closely followed by Co. Leitrim (€18,738) and Co. Louth (€18,359). Indeed, Co. Donegal's figures are the main contributors to the low overall figure for the Border Regional Authority area (€17,370), since all the other counties within it posted levels of disposable income above the region's average.

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 76,090 registered businesses in 2020, an increase of 600 active businesses from 2019 (75,490). Continuing on a strong percentage in 2019, the NUTS 3 areas abutting the border held a significant share of this number, as shown in Chart 7.⁶⁹

⁶⁸ CSO, "[Table 3: Estimates of Disposable Income per Person by Region and County, 2007 to 2017](#)" (27 February 2020)

⁶⁹ 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, 2013-2020", in NISRA, "[Edition 22 – Facts and Figures from the IDBR](#)" (11 June 2020).

Chart 7: % of VAT/PAYE registered businesses NUTS 3 area in Northern Ireland (2019 & 2020)



Belfast has the highest percentage of registered businesses in Northern Ireland in 2020 with a 14.5% of active businesses in Northern Ireland located in the area. Similar to 2019, the five NUTS 3 areas in the Northern Ireland-Ireland border region account for a total of 52.8% of active businesses in Northern Ireland with the largest single area, Mid Ulster, accounting for 11.9% or 9,035 businesses. Newry, Mourne & Down registered the largest increase of the five NUTS 3 regions in the number of businesses for the second year in a row, following up an increase of 220 (2.6%) in 2019, with an increase of 120 (1.4%) in 2020. As we will see in Chart 8 below, Northern Ireland has a more evenly spread share of businesses across its NUTS 3 areas when compared to the Republic of Ireland.

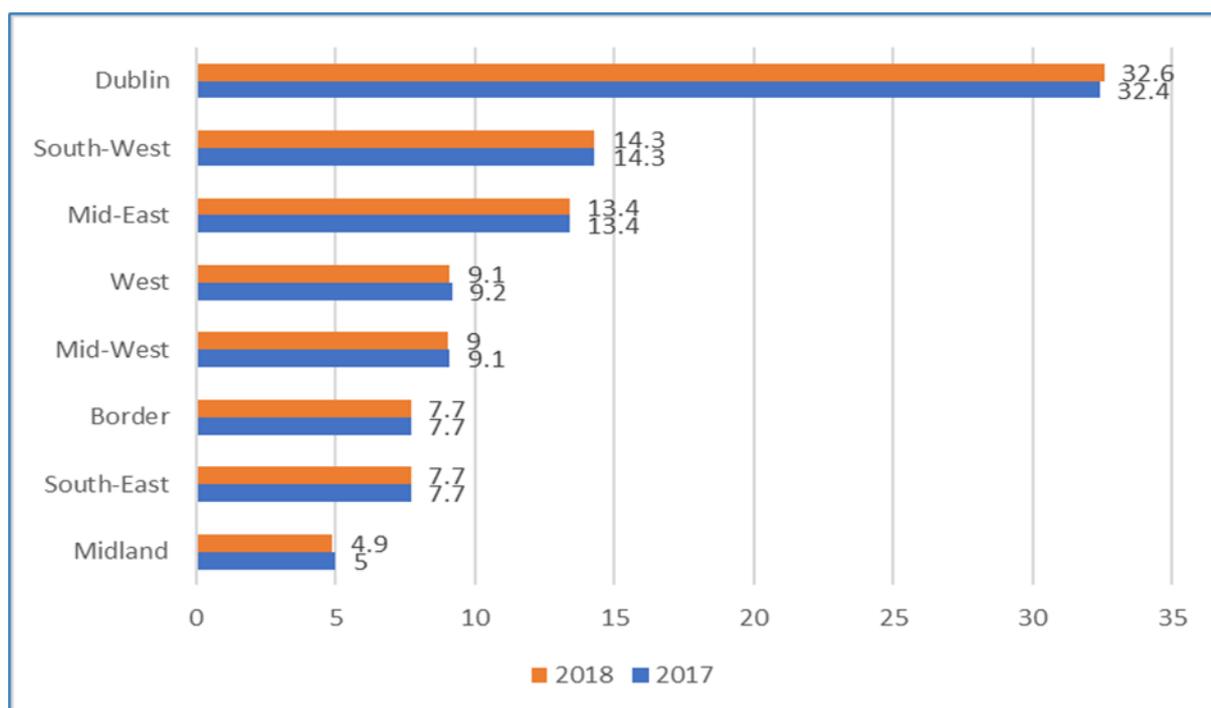
Figures for 2018 show that there were 270,344 active enterprises in the Republic of Ireland, a fall of 822 from 2019. Chart 8 below sets out how they were dispersed across the NUTS 3 areas.⁷⁰ However, it is important to note that whilst enterprises in the food products, beverages and tobacco sector are included in the CSO estimates, agricultural businesses (farms) 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".⁷¹

⁷⁰ Calculated from data in CSO, "[Business Demography NACE Rev 2 by Employment Size, County, Year and Statistic](#)".

⁷¹ Teagasc, "[Agriculture in Ireland](#)".

While Belfast does hold the largest percentage of active businesses in Chart 7, it is only 2.6% ahead of its nearest rival in Mid Ulster, a slightly different picture is shown in Chart 8. Dublin (32.6% or 88,161 business) outstrips all other NUTS 3 areas in the Republic of Ireland by some distance, with a difference of 18.3% from the 2nd place South-West. The Mid-East, including Co. Louth, accounts for the third largest share (13.4%), with the Border Regional Authority area having one of the lowest shares (7.7%). 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.⁷²

Chart 8: % of active enterprises by NUTS 3 area in the Republic of Ireland (2017 & 2018)



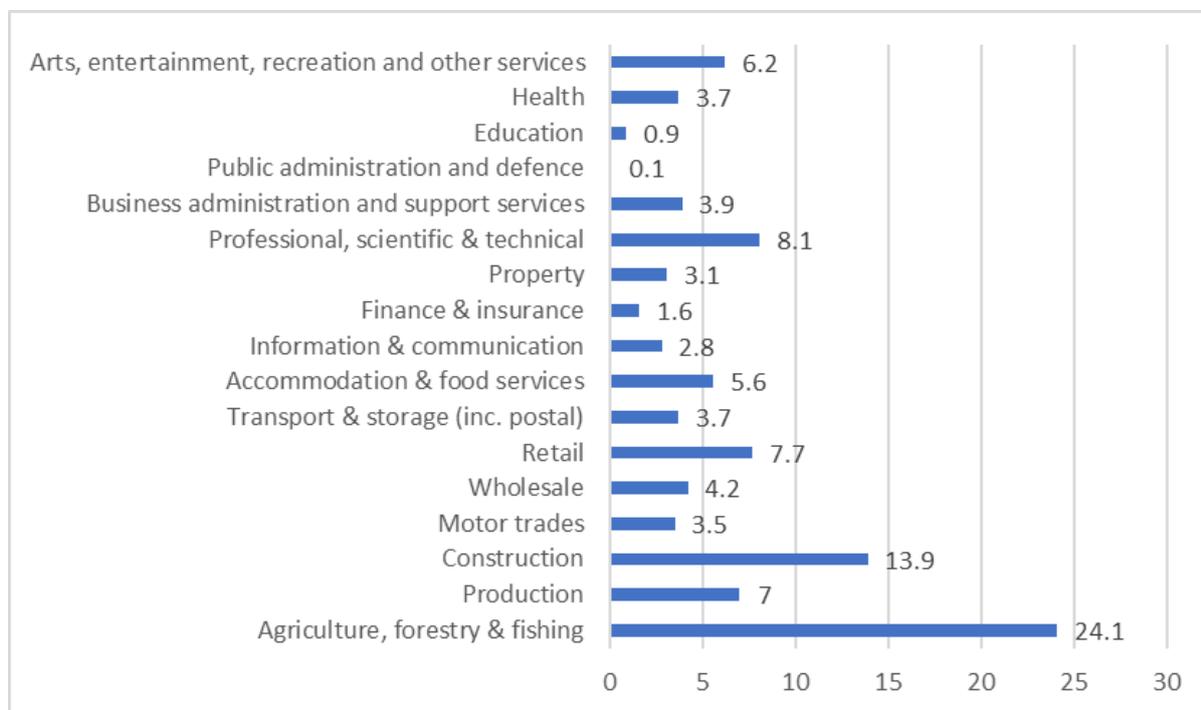
Bearing in mind important underlying differences in how the CSO and NISRA estimate the numbers of businesses in their respective jurisdictions, in 2018 (the earliest year for which the relevant data is available for both jurisdictions) there were 66,558 businesses in the Northern Ireland-Ireland border region (39,115 in the five NUTS 3 areas on the Northern Ireland side of the border, and 27,343 in the Border Regional Authority area and Co. Louth on the other side). That represented 19.2% of businesses on the island of Ireland in 2018.

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,

⁷² In 2018 Co. Donegal had 2.3% of the island's active enterprises, with Co. Louth having 1.9%, Co. Cavan 1.2%, Co. Monaghan 1%, Co. Sligo both 0.9%, and Co. Leitrim 0.6%.

sets out the weight of a range of business activities in Northern Ireland as a percentage of all businesses registered in 2020 (76,090).⁷³

Chart 9: % of businesses in Northern Ireland by Broad Industry Group (2020)



Agriculture, forestry and fishing businesses continue to dominate the business landscape in Northern Ireland, despite a decrease of 0.4% from 2019, representing 24.5% of all businesses, with construction maintaining a significant presence at 13.9%, followed by professional, scientific and technical enterprises (8.1%). Retail is the next largest share of businesses with 7.7%, falling from 8% in 2019. According to the Northern Ireland Skills Barometer produced in July 2019, while there may be many agriculture businesses in Northern Ireland, they only represent 3.3% of all employee jobs, whereas health has over 15% of employee jobs.⁷⁴ The business landscape within the five 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 45.6% of all businesses in Fermanagh & Omagh in 2020, with all other sectors having a smaller representation than the overall figure for Northern Ireland. Of these, the area is significantly below the Northern Ireland overall figure in production (1.4% below), wholesale (1.3% below), retail (1.5% below), accommodation and food services (2.3% below), information and communication (2.1% below), and arts, entertainment and recreation (2.4% below). But the sector that is most significantly underrepresented in Fermanagh & Omagh is professional, scientific and

⁷³ NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2020", in "[Edition 23 – Facts and Figures from the IDBR](#)" (11 June 2020).

⁷⁴ See Ulster University Economic Policy Centre, "[Northern Ireland Skills Barometer – Summary report](#)" (July 2019), p.4.

technical, where the area is 4.2% below the figure for Northern Ireland. This difference continues to grow with a 0.1% increase from 2019 where the sector in Fermanagh was 4.1% below the national average. This, however, is a common feature across all five of the NUTS 3 areas where this business sector has a lower presence, although Fermanagh & Omagh shows the greatest discrepancy.

Of the five areas, Mid Ulster has the second highest representation of agriculture, forestry and fishing, at 35.6% of all businesses in 2020. It also has a more significant presence of production (9.2%) and construction (16.9%) businesses than is the case for Northern Ireland as a whole, but a significantly lower representation of businesses in retail (1.7% lower), accommodation and food services (2.2% lower), information and communication (1.8% lower), arts, entertainment and recreation (2.7% lower), and professional, scientific and technical (3.5% lower).

Agriculture, forestry and fishing is also an important business sector in Newry, Mourne & Down (26.8% of all businesses), but the representation of the construction sector is even more significant (17.5%) than the overall figure for Northern Ireland, with the transport sector (4%) also being slightly more important to this area than for Northern Ireland as a whole. The only sector significantly underrepresented in Newry, Mourne & Down is professional, scientific and technical, which is 1.4% below the overall figure for Northern Ireland, with all other sectors not falling below the overall figure by more than one percentage point, and production being just above that (7.1%) of Northern Ireland as a whole.

In Armagh, Banbridge & Craigavon, meanwhile, while agriculture, forestry and fishing represented 27.4% of all businesses in the area in 2020, a number of other sectors were more strongly represented than was the case for Northern Ireland as a whole. These included production (7.6%), construction (14%), motor trades (3.8%), wholesale (5.2%), retail (8.4%), and transport and storage (4.9%). Of those sectors where representation was significantly below the overall figure for Northern Ireland, accommodation and food services, and professional, scientific and technical saw the greatest differences (1.3% and 1.8% lower respectively).

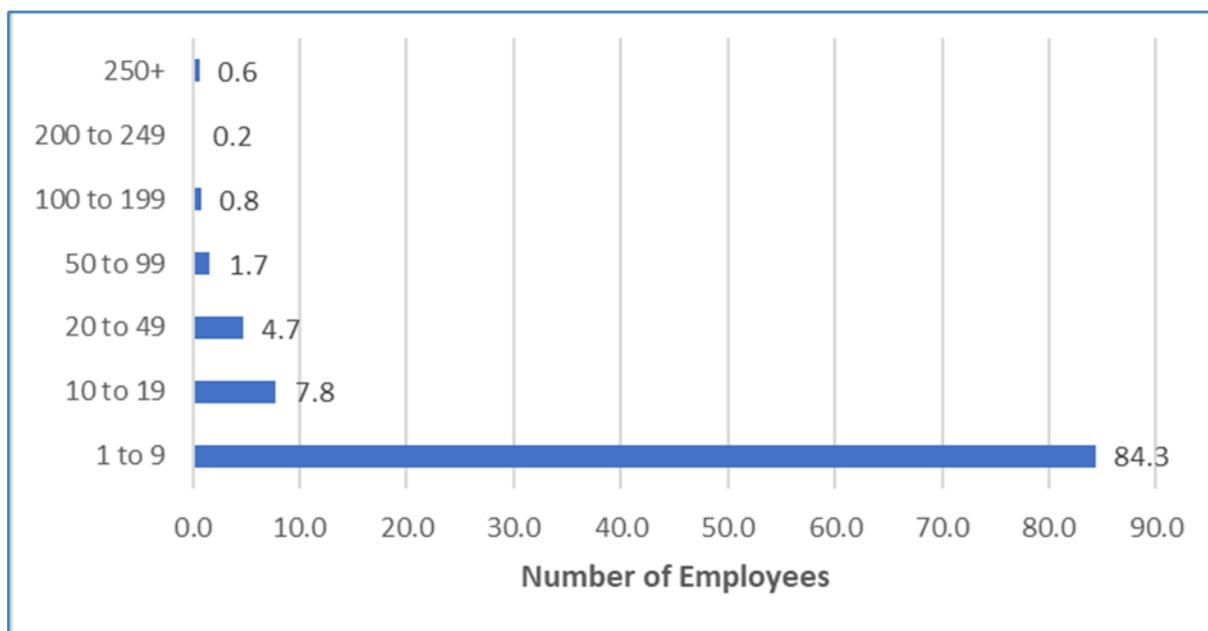
Derry & Strabane was the only area where agriculture, forestry and fishing was not more strongly represented than the overall figure for Northern Ireland in 2020, accounting for 23.7% of all businesses. Motor trades (3.8%), retail (8.3%), accommodation and food services (5.8%), and arts, entertainment and recreation (6.5%) all featured more prominently in Derry & Strabane than in Northern Ireland as a whole, but with health (4.2%) and construction (15.7%) having the greatest comparative presence in relation to their overall presence in Northern Ireland. Of the sectors less well represented in Derry & Strabane than is the case in Northern Ireland as whole, the professional, scientific and technical sector registered the greatest discrepancy, at 1.1% below the equivalent figure for Northern Ireland.

In 2020, therefore, 70.8% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five NUTS 3 areas adjoining the border, which also contained 59.1% of all construction businesses, 51.6% of all transport and storage businesses, 55.1% of all production businesses, and 48.9% of all retail businesses. In contrast, the same

areas only contained 27.1% of all information and communication businesses, and 36.7% of all professional, scientific and technical businesses.

Smaller enterprises employing less than ten people predominate in Northern Ireland, with only 310 companies having more than 250 employees, which accounts for 0.6% of businesses, as can be seen in Chart 10.⁷⁵

Chart 10: % of VAT and/or PAYE registered businesses in Northern Ireland by employee size band (2020)



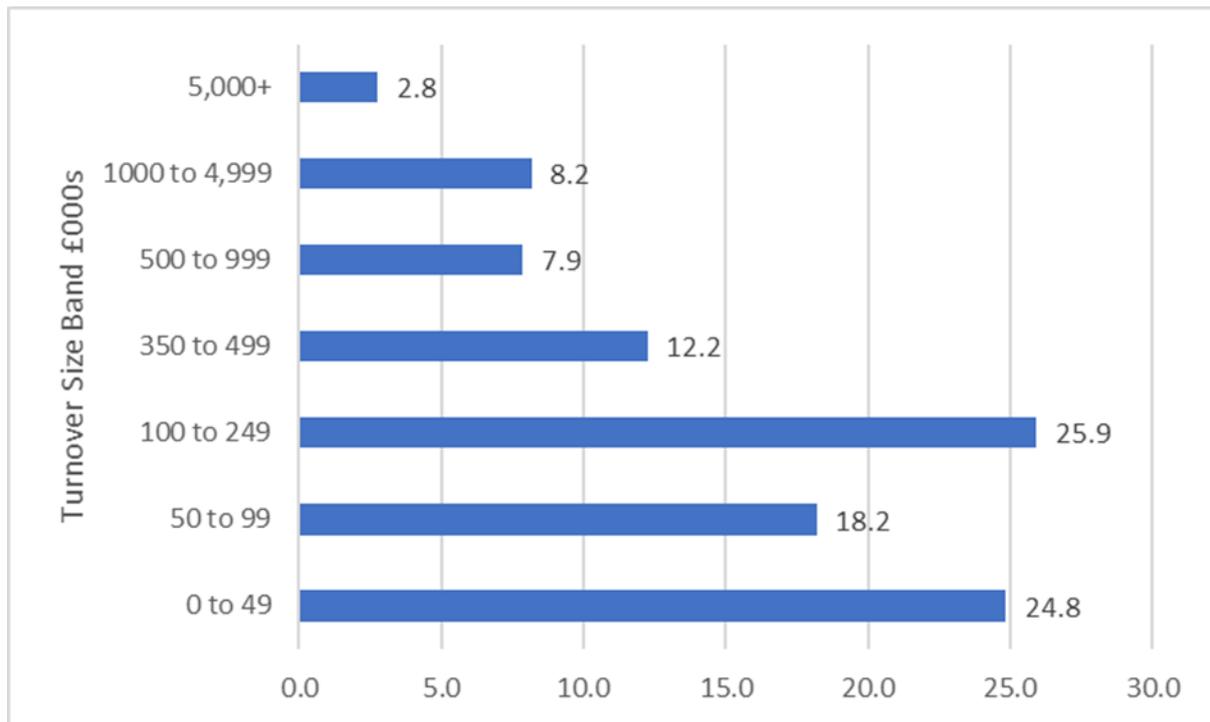
Businesses employing less than ten people have a higher presence in all five of the Northern Ireland NUTS 3 areas in the Northern Ireland-Ireland border region than the 84.3% overall figure, with Fermanagh & Omagh having the highest representation of such businesses (88.1%). However, while smaller businesses also dominate in Derry & Strabane, it has higher percentages of businesses employing 10 to 19 people (7.8%) and of those with more than 250 employees (0.7%) than is the case for Northern Ireland overall.

As can be seen in Chart 11,⁷⁶ the majority of businesses in Northern Ireland had a turnover of less than £250,000 in 2020, with only 2.8% registering a turnover of £5million or more, although as in many other aspects Belfast diverges substantially from the pattern elsewhere, having a much lower percentage of businesses with a turnover lower than £49,000 (11.2%), and a much higher percentage of those with a turnover of £5 million or more (5.7%).

⁷⁵ 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, 2020”, [“Edition 23 – Facts and Figures from the IDBR”](#) (11 June 2020). It is important to note that in our calculations we have discounted holding companies and registered companies not yet trading.

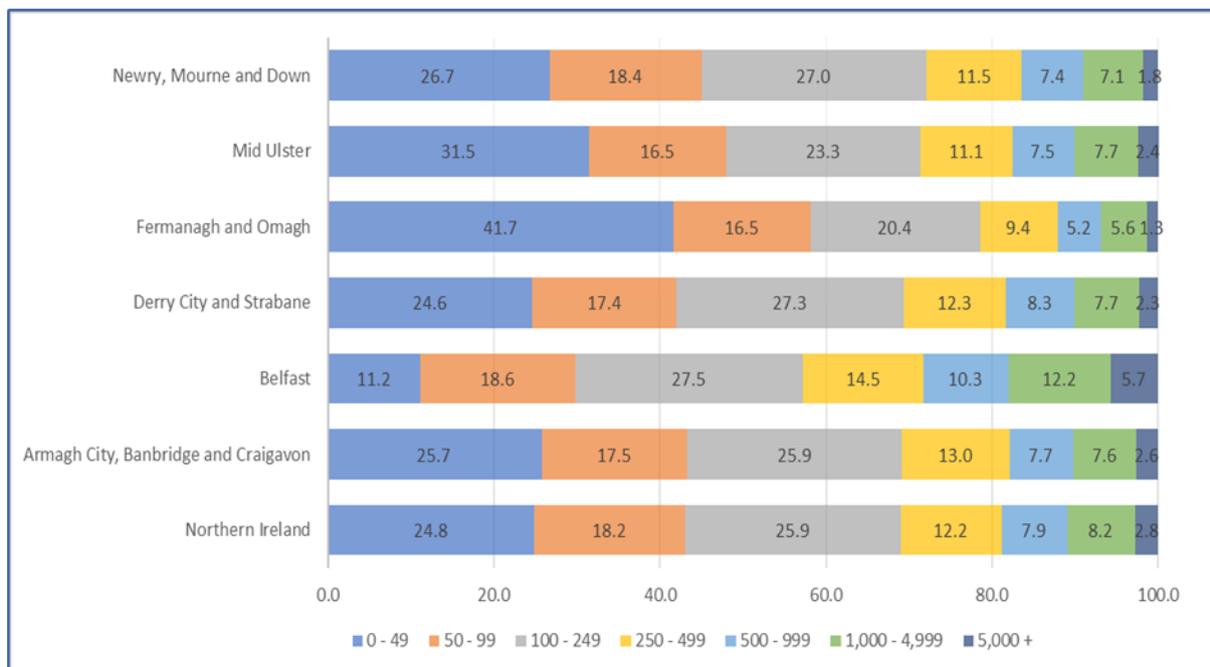
⁷⁶ NISRA, “Table 3.3: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Turnover Size Band, 2020”, [“Edition 23 – Facts and Figures from the IDBR”](#). (11 June 2020)

Chart 11: % of registered businesses in Northern Ireland by turnover size band (2020)



Almost 70% of Northern Ireland businesses are in the lower turnover size bands, with 24.8% of them with turnover of less than £49,000. This pattern is felt somewhat more acutely in most of the NUTS 3 areas adjoining the border, with 41.7% of businesses in Fermanagh & Omagh having a turnover of £49,000 or less in 2020, and only 1.3% with a turnover of £5 million or more, as shown in Chart 12.

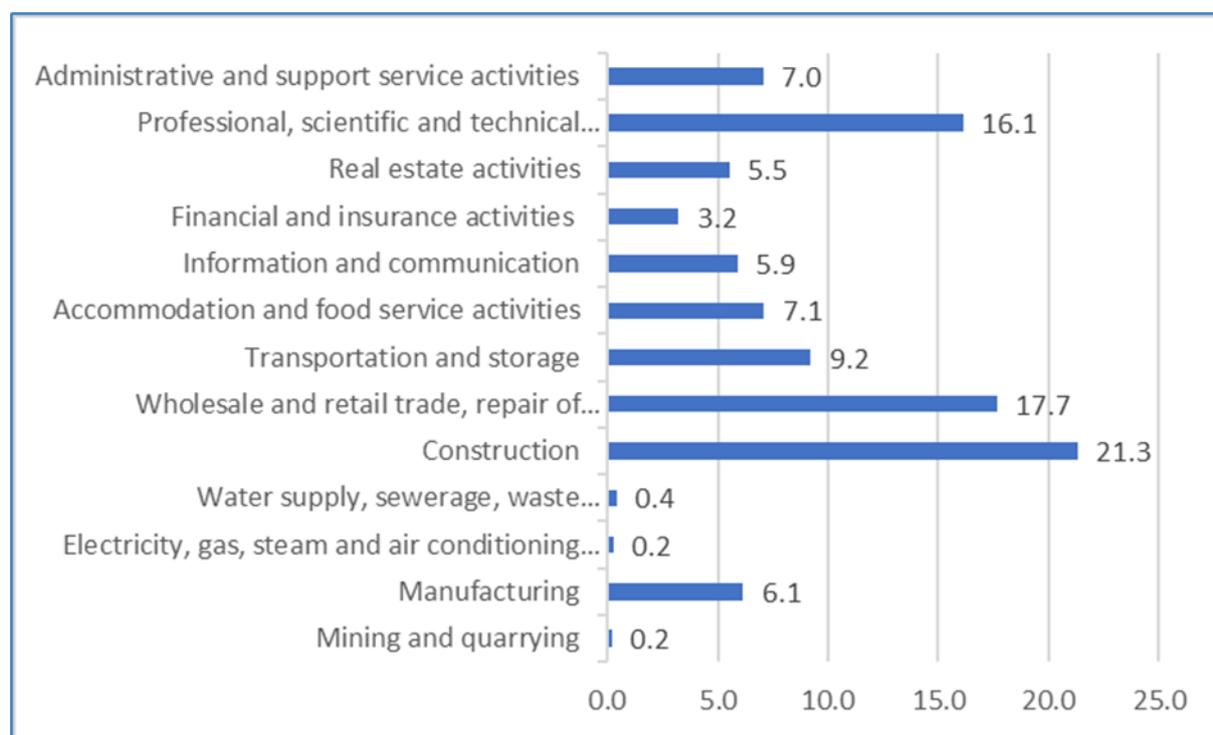
Chart 12: % of registered businesses by turnover size band, £ thousands (2020)



Newry, Mourne & Down and Derry & Strabane both distinguish themselves from the other Northern Ireland NUTS 3 areas in the Northern Ireland-Ireland border region, and from the overall pattern in the jurisdiction. In 2020 they had a higher percentage of businesses in all turnover bands from £100,000 to £249,000, with Armagh, Banbridge & Craigavon gaining parity, than Northern Ireland as a whole. Newry, Mourne & Down was also above the Northern Ireland average in the £50,000 to £99,000 bracket, as was Derry & Strabane in the £250,000 to £499,000 and £500,000 to £999,000 cohorts. Four of the five NUTS 3 areas in Northern Ireland which abut the Northern Ireland/Ireland border fell below the overall Northern Ireland level for £5,000,000+ turnover, with Armagh Banbridge & Craigavon the area managing to match overall level of 2.6%.

Given the different methodologies employed by the CSO and NISRA in categorizing 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 2018.⁷⁷

Chart 13: % of active enterprises in the Republic of Ireland by activity (2018)



We can see how construction (21.3%), wholesale and retail (17.7%), and professional, scientific and technical (16.1%) 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

⁷⁷ CSO, ["Table 1: Active Enterprises \(Number\) by Activity and Year"](#). (24 July 2020)

Ireland-Ireland border region, with construction having an even greater presence here (representing 29.2% of businesses in Co. Cavan in 2018, and 22.7% in Co. Louth where it had the lowest percentage). The wholesale and retail trade was most strongly represented in Co. Monaghan (24.8% of all businesses in 2017), and had a weaker presence in Co. Sligo (18.2%). However, 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 the former accounting for 11.6% and the latter 9.3%. In the other counties the professional, scientific and technical sector was the third most represented, although with a weaker presence than in the Republic of Ireland as a whole (with Co. Sligo having the highest percentage of businesses with such activities, at 14.2%).⁷⁸

As noted earlier, agriculture is not included in the CSO data we have been referring 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.⁷⁹

As can be seen in Table 13,⁸⁰ the predominance of businesses employing ten people or less in the Republic of Ireland in 2018 (91.9%) appears to be even stronger than in Northern Ireland, where in 2020 they accounted for 84.3%.

Table 13: % of Republic of Ireland businesses by employment size (2018)

	Under 10 employees	10 to 19	20 to 49	50 to 249	250+
Republic of Ireland	91.9	3.9	1.2	0.3	0.0
Cavan	92.3	4.0	2.4	1.2	0.1
Donegal	91.6	4.9	2.5	1.0	0.1
Leitrim	97.7	0.0*	1.7	0.6	0.0*
Louth	91.3	4.8	2.7	1.0	0.2
Monaghan	90.8	4.8	2.8	1.5	0.1
Sligo	92.3	4.2	2.3	1.0	0.2

⁷⁸ The data used for these calculations was taken from CSO, "[BRA18: Business Demography by Activity, County, Year and Statistic](#)". (29 September 2020)

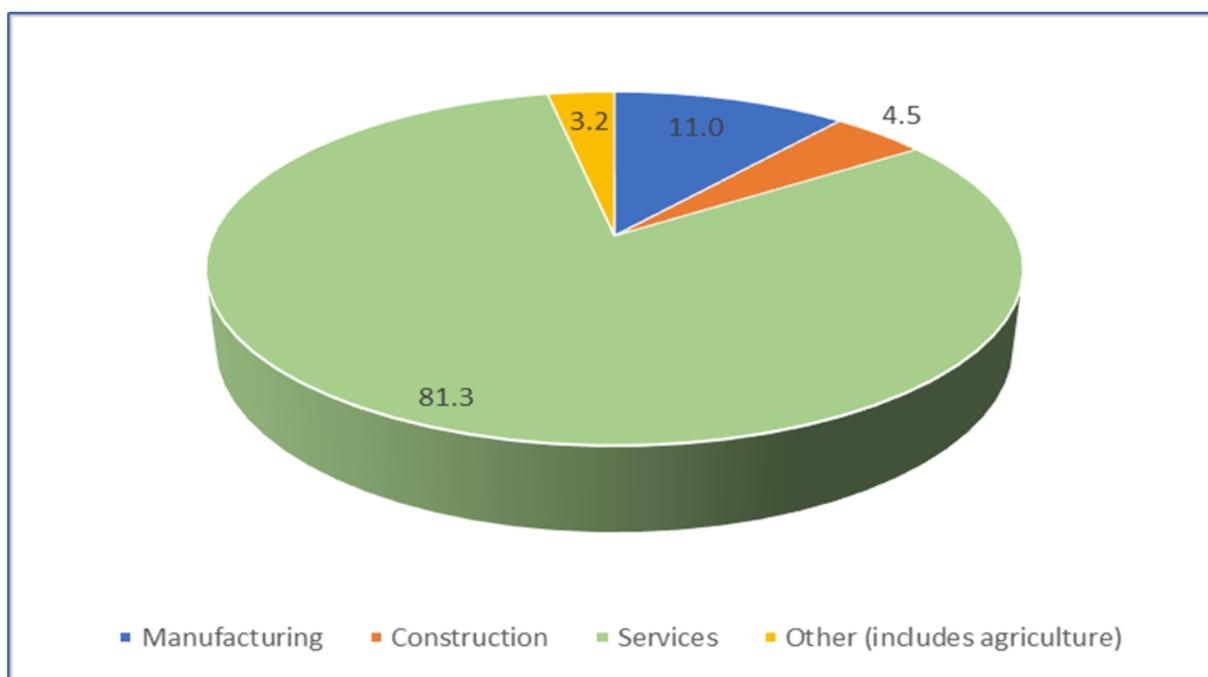
⁷⁹ CSO, "[Table 2.1: Number of Farms by Farm Size \(AAU\) and Region 2016](#)".

⁸⁰ CSO, "[BRA08: Business Demography NACE Rev 2 by Employment Size, County, Year and Statistic](#)". (28 September 2020)

Although the Irish border counties' business demography in terms of the sizes of its businesses is broadly in line with that of the Republic of Ireland overall, Co. Monaghan in particular has a higher percentage of businesses employing between 10 and 249 people. Nevertheless, the vast majority of businesses in Ireland's border counties employ less than ten people. Cavan and Sligo, both 92.3%, have higher levels of businesses with under 10 employees than the overall national level.⁸¹

Returning to Northern Ireland, Chart 14 details the percentage of employee jobs in Northern Ireland by broad sector.⁸² As the Chart shows, of the 779,880 employee jobs in 2020, the majority were in services, totaling 633,860 or 81.3% (a decrease of 1.3% from 2019). Manufacturing occupied the second largest share with 11.0% for 2020. Both the manufacturing and construction sectors maintained similar shares of employee jobs but jobs in the other category, which includes agriculture recorded an increase of 1.7% from 2019, rising to 3.2% in 2020.

Chart 14: % of employee jobs in Northern Ireland by broad sector (June 2020)



⁸¹ Leitrim is also above the national level with 97.7% but this percentage has been influenced by the lack of available data for the county due to reasons of confidentiality.

⁸² NISRA, Table 4: "Employee jobs summary statistics", [Labour Market Report – November 2020](#) (10 November 2020)

However, there are some significant differences in terms of the sectoral distribution of employment in the five of Northern Ireland's NUTS 3 areas within the Northern Ireland-Ireland border region, particularly in relation to the relative importance of the services sector.

Table 14: % of employee jobs by broad sector in NUTS 3 areas in Northern Ireland (2019)

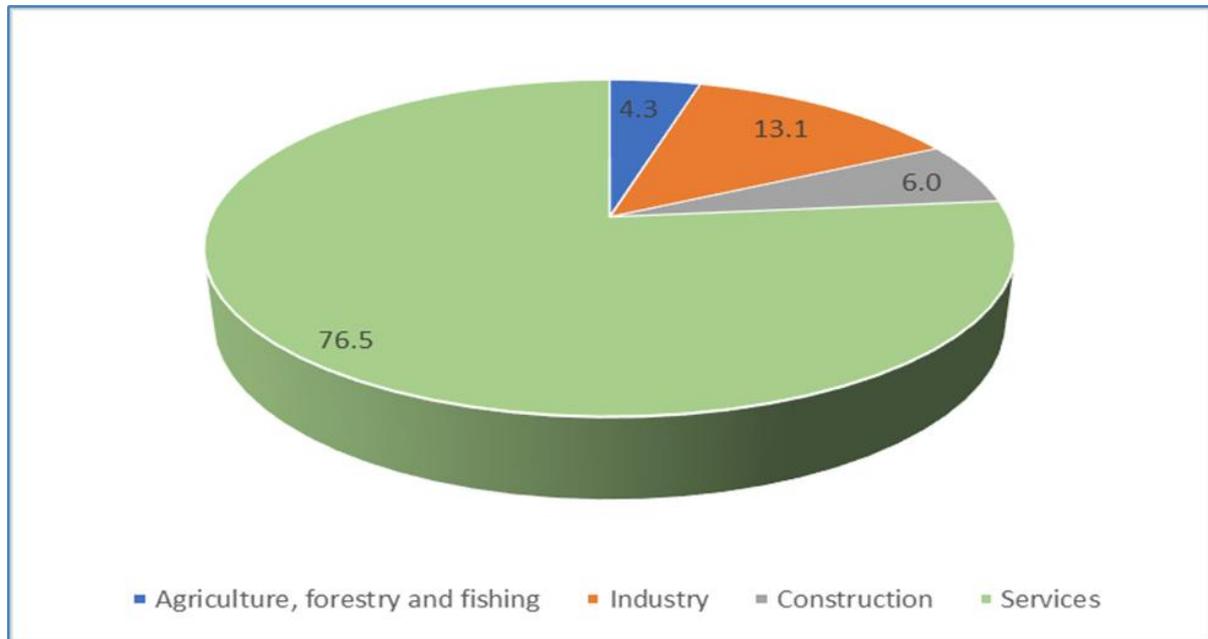
	Construction	Manufacturing	Services	Agriculture	Other
Armagh, Banbridge & Craigavon	5.0	16.8	74.0	2.8	1.4
Derry & Strabane	4.6	10.1	82.6	1.5	1.3
Fermanagh & Omagh	6.9	13.2	73.7	3.7	2.5
Mid Ulster	8.8	29.1	57.3	2.9	1.8
Newry, Mourne & Down	6.6	13.2	75.1	2.7	2.3

With the exception of Derry & Strabane (where it is gained parity), Table 14 above shows how in 2019 the service sector employed a smaller percentage of people than was the case for Northern Ireland overall, and this was most notably the case for Mid Ulster.⁸³ Here, whereas the services sector only accounted for 57.3% of employee jobs, manufacturing represented 29.1%, which is more than double the figure for Northern Ireland as a whole. This was the case for the area in 2018, where the figures were 58.3% and 28.6% respectively. This sector was also more important in terms of the share of employee jobs in the other NUTS 3 areas within the border region, except for Derry & Strabane, where it accounted for 10.1% (an increase of 0.3% from the previous year). Construction also accounted for more employee jobs in all five of the NUTS 3 areas than in Northern Ireland overall, with Mid Ulster having the highest percentage (8.8%). In overall terms agriculture was not a significant sector for employee jobs, with Fermanagh & Omagh having the highest share in this sector, at 2.5%.

⁸³ NISRA, "BRES 2019", in ["Business Register and Employment Survey"](#) (30 June 2020).

the CSO's Labour Force Survey for the third quarter of 2019 includes the distribution of those aged 15 years and over in employment by business sectors, including agriculture, as set out in Chart 15.⁸⁴

Chart 15: % of persons aged 15 years and over in employment by broad sector in the Republic of Ireland (Q3 2020)



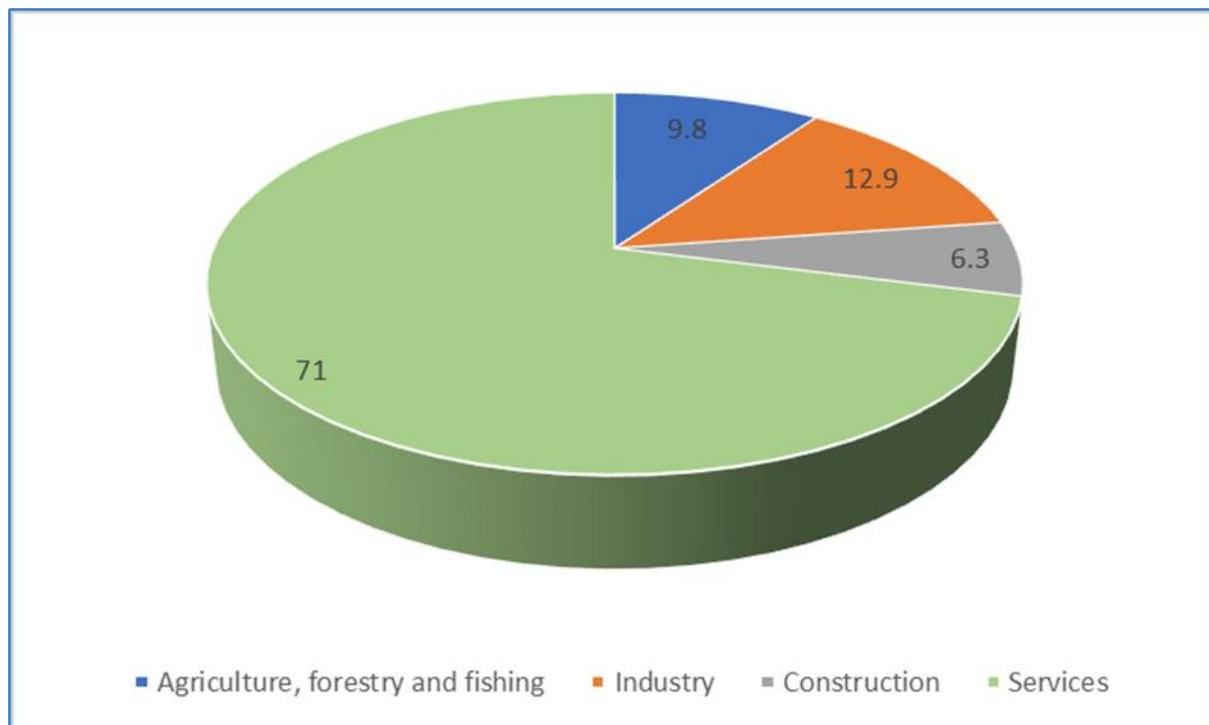
We can see from the above chart that as in Northern Ireland the services sector accounts for the largest share of those employed (76.5%) in the Republic of Ireland, although its dominance is not as marked as in Northern Ireland. A slightly higher percentage of people are engaged in the construction, industry, and agriculture, forestry and fishing sectors than in Northern Ireland.⁸⁵

⁸⁴ CSO, "[Labour Force Survey](#)" (17 November 2020)

⁸⁵ In the calculations we have discounted those who had not stated the sector in which they were employed.

However, as shown in Chart 16, there are some variations from this national distribution pattern in the Border Regional Authority area.⁸⁶

Chart 16: % of persons aged 15 years and over in employment by broad sector in the Border Regional Authority Area (Q3 2020)



In the Border Regional Authority area there were approximately 6% less people employed in the services sector, with a similar share employed in industry (12.9%) and more than double (9.8%) in agriculture, forestry and fishing. This picture has changed somewhat from 2019, where only 66.7% of people were employed in the service industry, with industry also showing a significant change, falling by 3.5% from the previous year.

The Mid-East region, which includes Co. Louth, did not diverge substantially from the overall national pattern of employment distribution, with the services sector employing a slightly less along with agriculture and industry employing slightly more, and construction showing the greatest difference (employing 7.6%), an increase of 1.6% on 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, we cannot make straightforward comparisons between the two jurisdictions. In the case of Northern Ireland, therefore, we can look at the number of job vacancies notified to Job Centres and Jobs & Benefits Offices of

⁸⁶ CSO, "[Persons aged 15 years and over in Employment](#)", Labour Force Survey (30 November 2020)

the Department for Communities (DfC) in the 2019/20 financial year, and see how many of these are available in the five NUTS 3 areas in the Northern Ireland-Ireland border region.⁸⁷

Table 15: Employment vacancies to DfC (2019/2020)

	Number of vacancies	Number per 1,000 of resident population	% change from previous year
Northern Ireland	74,293	39.7	27%
Armagh, Banbridge & Craigavon	10,298	48.1	9%
Derry & Strabane	5,102	33.9	44%
Fermanagh & Omagh	2,005	17.2	-12%
Mid Ulster	5,339	36.2	21%
Newry, Mourne & Down	3,256	18.1	4%

The five local government districts which abut the Northern Ireland-Ireland border account for 35% of the total vacancies in Northern Ireland in 2019/2020. As we see in Table 15, Derry & Strabane recorded the largest increase in number of vacancies in 2019/2020 with 1,551 more jobs advertised than the previous year, an increase of 44%, with 33.9 vacancies per head of its population. Fermanagh & Omagh experienced a 12% decrease in vacancies with 283 less jobs advertised in 2019/2020. This follows a 7% decrease in 2018/2019 meaning that the LGD had 17.2 vacancies per 100 head of population in the latest year.⁸⁸

Although there are no readily available data at the NUTS 3 area level, the sectors of economic activity in Northern Ireland with the highest number of notified vacancies to the DfC in 2019/20 were: “Personal Service Occupations” (17,091, an increase of 75% from 2018/18); “Associate Professional & Technical Occupations” (13,254, an increase of 84%); “Elementary Occupations” (11,777, a 12% decrease); “Sales and Customer Service” (8,447, a 40% increase); and “Process, Plant & Machine Operatives” (7,052, a 26% increase).⁸⁹

The CSO’s preliminary estimates for the third quarter of 2020 sets the number of job vacancies in the Republic of Ireland at 15,900 (which, if confirmed, would represent a fall from Q3 of 2019, when there were 16,400 vacancies). It also means that vacancies would have fallen for the second year in a row having originally been 21,500 in Q3 of 2018. The sectoral distribution of these vacancies is shown in Table 16.

⁸⁷ As the Department for Communities’ [“Statistical Bulletin: Employment Vacancies Notified to the Department for Communities – 2019/20 Financial Year”](#) (1 May 2019) 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.1).

⁸⁸ Department for Communities, [“Statistical Bulletin: Employment Vacancies Notified to the Department for Communities – 2019/20 Financial Year”](#), p.8.

⁸⁹ Department for Communities, [“Statistical Bulletin: Employment Vacancies Notified to the Department for Communities – 2019/20 Financial Year”](#), p.10.

Table 16: Number of job vacancies in the Republic of Ireland by economic sector (Q3 2020)

	Q3 2019	Q3 2020	% Change
Industry	1,500	1,400	-6.7
Construction	400	200	-50.0
Wholesale and retail trade	1,800	1,900	5.6
Transportation and storage	400	200	-50.0
Accommodation and food services	900	400	-55.6
Information and communication	1,500	1,100	-26.7
Financial, insurance and real estate	1,900	1,000	-47.4
Professional, scientific and technical	2,500	1,500	-40.0
Administrative and support services	900	800	-11.1
Public administration and defence	1,900	3,000	57.9
Education	1,100	2,100	90.9
Human health and social work	1,300	1,700	30.8
Arts, entertainment and recreation	300	600	100.0

Outside of public administration and defence (with 3,000 vacancies), the sectors with the highest numbers of job vacancies in the Republic of Ireland in the third quarter of 2020 were Education (2,100), Wholesale and retail trade (1,900), and Human health and social work (1,700).

Regional and local level figures are not available through the CSO vacancy data but if we look back at a report by an Irish recruitment website in 2018, we can gain some insights through it that include developments at county level. Thus, its report on the third quarter of 2018 notes how Co. Monaghan saw a 49% year-on-year increase in the number of vacancies – the highest in Ireland. We can see how Co. Monaghan’s performance compares to that of the other Irish counties within the Northern Ireland-Ireland border region in Table 17.

Table 17: Year-on-year % change in number of job vacancies (Q3 2020)

Cavan	23%
Donegal	-2%
Leitrim	11%
Louth	20%
Monaghan	49%
Sligo	15%

Whereas almost all counties in the Republic of Ireland saw an increase in the number of vacancies, Donegal was one of only three counties which actually saw a decrease in the third quarter of 2018.

In light of Covid-19 restrictions, Irish employers and employees have been forced to quickly adapt to working remotely. This trend is reflected in the Quarter 3 2020 Jobs Index location data on an Irish recruitment website, where remote working roles are up 112% quarter-on-

quarter and 1264% from the same period in 2019.⁹⁰ The latest available data concerning Northern Ireland relates to the period April 2020 where the proportion of the workforce in Northern Ireland was measured at 40.9%.⁹¹

The latest figures available for Northern Ireland as a whole relating to those availing of the Coronavirus Job Retention Scheme are from November 2020 stand at 54,100 of a possible 791,100 who are eligible, or 7%.⁹² Newry, Mourne and Down has the highest percentage of eligible workers furloughed along with Belfast at 8% while the other four local government districts which abut the Northern Ireland-Ireland border are all below the overall figure for Northern Ireland. The COVID-19 crisis has also had a significant impact on the labour market in the Republic of Ireland. Claimants of the Pandemic Unemployment Payment (PUP) for September 2020 were 217,142.⁹³ The Temporary Wage Subsidy Scheme in the Republic of Ireland was replaced by the Employment Wage Subsidy Scheme in at the end of August 2020 with data from the new scheme not yet available.

In order to gather a better picture of the Covid-19 supports provide by the governments in both jurisdictions on the island of Ireland to the Northern Ireland-Ireland border region we need to look back to the figures for end of July 2020. The table below details those in receipt of the Coronavirus Job Retention Scheme in Northern Ireland by local government district.⁹⁴

Table 18: CJRS Furloughed employment by Local Authority (July 2020)

	Jul-20	Total Furloughed	Eligible	Take Up %
Northern Ireland		249,600	791,100	32%
Antrim and Newtownabbey		20,900	65,000	32%
Ards and North Down		19,700	64,700	30%
Armagh City, Banbridge and Craigavon		28,800	94,900	30%
Belfast		44,100	147,200	30%
Causeway Coast and Glens		18,200	53,200	34%
Derry City and Strabane		17,000	59,600	29%
Fermanagh and Omagh		14,400	45,500	32%
Lisburn and Castlereagh		19,800	66,100	30%
Mid and East Antrim		19,400	59,600	33%
Mid Ulster		23,100	64,700	36%
Newry, Mourne and Down		24,300	70,700	34%

While the overall Northern Ireland uptake to the scheme was 32%, both Mid Ulster (36%) and Newry, Down & Mourne (34%) exceeded this level. Armagh City, Banbridge & Craigavon (30%)

⁹⁰ Irish Jobs, "[Resilient Jobs Market sees 56% rise in Vacancies](#)", (13 October 2020)

⁹¹ ONS, "[Homeworking patterns in the UK, broken down by sex, age, region and ethnicity](#)", (8 July 2020)

⁹² HMRC, "[Coronavirus Job Retention Scheme statistics: November 2020](#)", (25 November 2020)

⁹³ CSO, "[Monthly Unemployment: November 2020](#)", (2 December 2020)

⁹⁴ HMRC, "[Coronavirus Job Retention Scheme statistics: September 2020](#)", (18 September 2020)

and Derry City & Strabane (29%) had less of a percentage uptake than the national average. The remaining local government district which abuts the border, Fermanagh & Omagh achieved parity at 32%.

Unlike the PUP scheme available in the Republic of Ireland, the Coronavirus Job Retention Scheme is not available to those who are self-employed in Northern Ireland. These workers can avail of the UK governments Self-Employment Income Support Scheme (SEISS) instead. The table below relates to individuals claiming the SEISS grant up to 31 July 2020.⁹⁵

Table 19: SEISS claims to 31 July 2020 by Local Authority

Jul-20	Claims	Eligible	Take Up
Northern Ireland	78,000	96,000	81%
Antrim and Newtownabbey	4,800	5,900	81%
Ards and North Down	6,000	7,500	80%
Armagh City, Banbridge and Craigavon	9,300	11,300	82%
Belfast	8,900	11,200	80%
Causeway Coast and Glens	7,700	9,400	82%
Derry City and Strabane	6,100	7,600	79%
Fermanagh and Omagh	6,400	7,800	82%
Lisburn and Castlereagh	5,100	6,300	81%
Mid and East Antrim	5,200	6,600	79%
Mid Ulster	8,300	10,000	83%
Newry, Mourne and Down	10,200	12,200	83%

As we can see above the overall level of uptake for the SEISS in Northern Ireland stood at 81% at the end of July 2020. Four of the five local government districts which are of particular concern to this report were above the overall level, Armagh City, Banbridge & Craigavon and Fermanagh & Omagh (both 82%), and Newry, Mourne & Down and Mid Ulster (both 83%). Derry & Strabane (79%) was below the national average.

⁹⁵ HMRC, [“Self-Employment Income Support Scheme statistics: August 2020”](#), (21 August 2020)

The Table below details the number of people in receipt of PUP and TWSS in the border counties in the Republic of Ireland.⁹⁶ While there are two separate sets of data available for those employed and self-employed in North Ireland, self-employed workers affected by the pandemic in the Republic of Ireland can avail of the PUP scheme in their jurisdiction.

Table 20: Total number of PUP & TWSS Claims by border county (July 2020)

Jul-20	PUP	TWSS	Total
Republic of Ireland	262478	261010	523488
Louth	7992	7325	15317
Leitrim	1543	1663	3206
Sligo	3018	3566	6584
Cavan	3579	4549	8128
Donegal	8063	9625	17688
Monaghan	3279	4718	7997

County Donegal (17688) had the highest number of people in receipt of Covid support payments followed by County Louth (15317). Cavan (8128) and Monaghan (7997) were almost equal in the number of claimants with Sligo (6548). Leitrim had the smallest number of people receiving support from both schemes.

Based on the above information which has been taken from the relevant CSO and NISRA sources, the total number of those in receipt of Covid-19 support payments from their respective jurisdictions in the Northern Ireland-Ireland border region was 206,820. In the five local government districts which abut the border, 107,600 workers were in part of the furlough payment while 40,300 self-employed workers had submitted claims to the SEISS scheme, a total of 45% of all claimants in Northern Ireland. In the border counties in the Republic of Ireland, 58,920 were in receipt of either PUP or TWSS, or 11.3% of all Covid supports. Payments to those in the Northern Ireland-Ireland border region accounted for 24.3% of all payments on the island of Ireland at the end of July 2020.

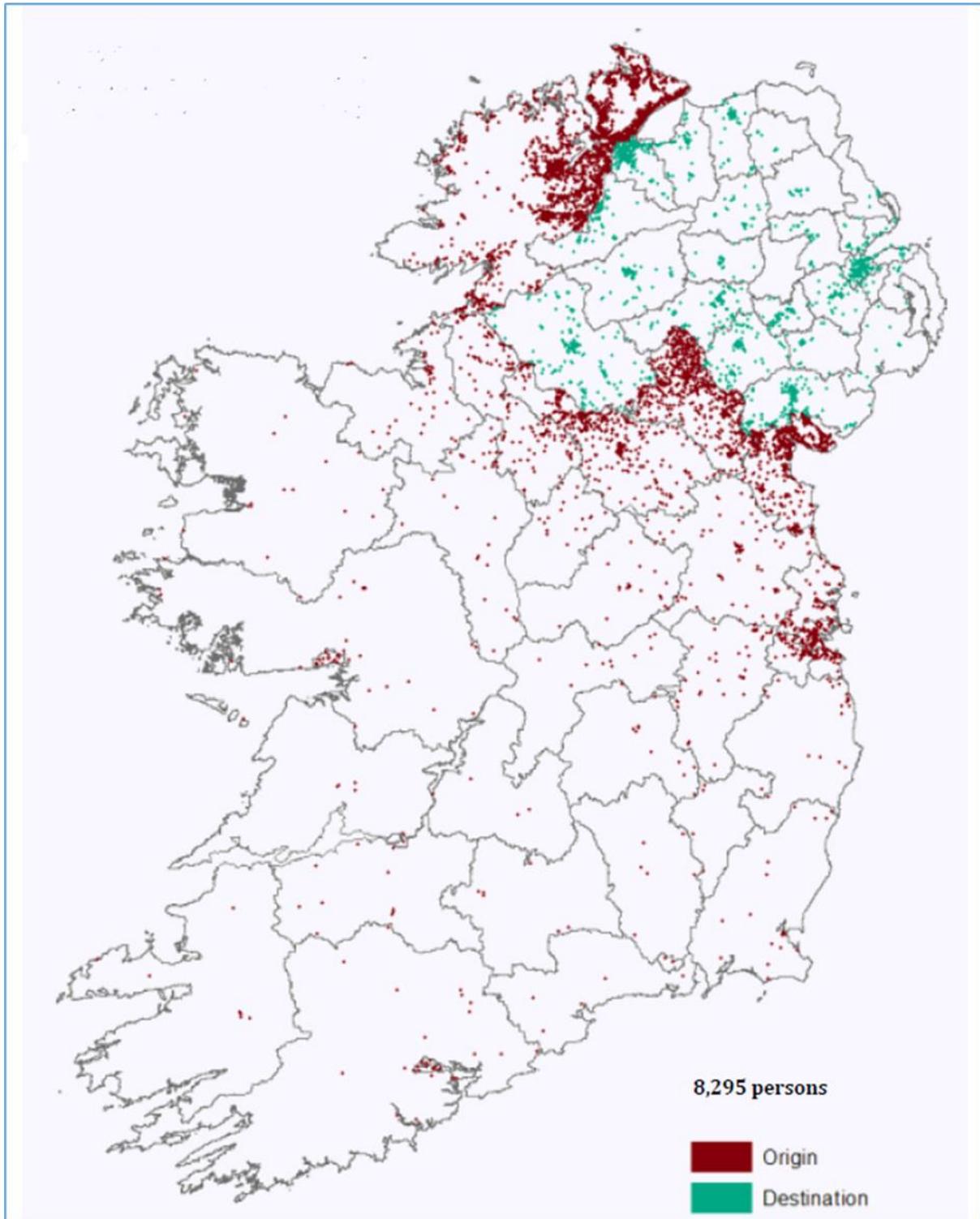
⁹⁶ CSO, "[Persons on the Live Register and Persons in receipt of the Pandemic Unemployment Payment and the Temporary COVID-19 Wage Subsidy Scheme](#)"

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, our 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 note 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”.⁹⁷ 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.

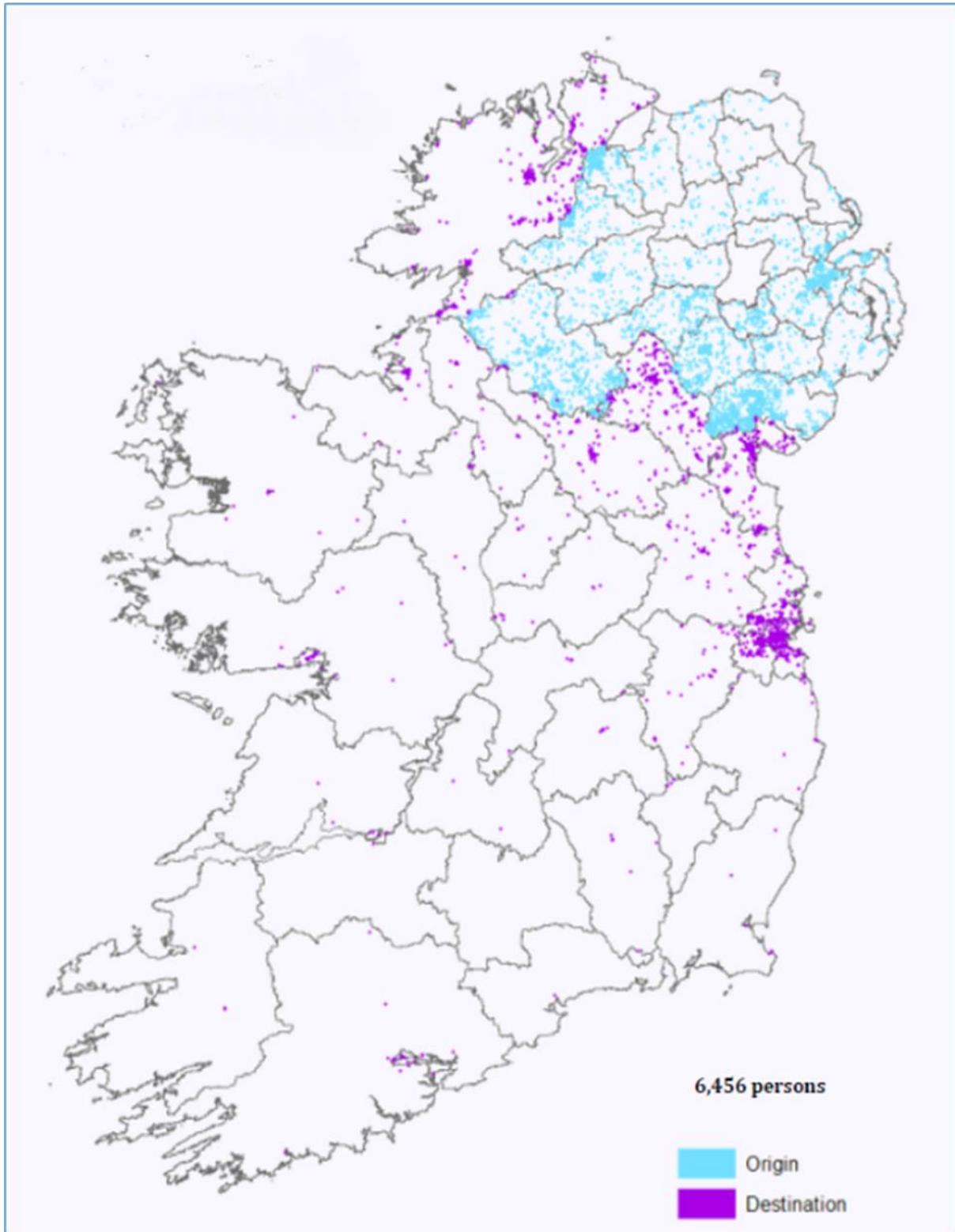
⁹⁷ CSO and NISRA, [“Census 2011: Ireland and Northern Ireland”](#) (June 2014), p.60.

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



[Census 2011: Ireland and Northern Ireland](#), p.61.

Map 7: Origin and destination of cross-border commuter from Northern Ireland to work or study in Ireland.



[“Census 2011: Ireland and Northern Ireland”](#), p.62.

The more recent report by Northern Ireland's Department for the Economy suggests 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".⁹⁸ It also reflects 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".⁹⁹

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 this 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 21 shows the counties of origin (left-hand column) and destination of people travelling from Ireland to Northern Ireland to work.

⁹⁸ Department for the Economy, "[Background Evidence on the Movement of People across the Northern Ireland-Ireland Border](#)" (March 2018), p.6.

⁹⁹ CSO, "[Cross Border Commuters 2016](#)", p.2.

Table 21: 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 3,926 people from Donegal cross the border to work in Northern Ireland, Derry is the recipient of 3,064 cross-border workers from Ireland. Four of the six Irish counties within the Northern Ireland-Ireland border region occupy 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 cross the border to work in Northern Ireland.¹⁰⁰

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 estimates 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 estimates 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.¹⁰¹

Table 22: 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	6070

According to the 2011 Census, the five Northern Ireland NUTS 3 areas abutting the border occupy the top five positions in terms of numbers of their residents working in the Republic

¹⁰⁰ 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](#)".

¹⁰¹ The data employed here is extracted from [Census 2011](#), "Location of Usual Residence by Place of Work in Republic of Ireland (ROI): CT0354NI".

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 NUTS 3 areas in the Northern Ireland-Ireland border region work.

Table 23: Distribution of residents of 5 Northern Ireland NUTS 3 areas 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 NUTS 3 areas in the border region to cross the border to work are: 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 highlights 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 available data highlighted thus far, there are a number of potential conclusions that arise, beginning with the focal points of cross-border labour mobility in the Northern Ireland-Ireland border region before stating the characteristics relating to the labour market environment in the Northern Ireland-Ireland border region that can be highlighted.

- The cross-border route between Derry & Strabane and Co. Donegal continues to be 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 remain the most important 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 continue to be 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.
- Co. Leitrim maintains some relative importance as a point of origin for cross-border labour mobility.
- Co. Sligo is not significant as a point of origin for cross-border labour mobility into Northern Ireland.
- 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 minor 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 (those aged 65 and over) continues to increase 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 percent of population 65 and over is still below the UK and EU averages.
- 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.
- The Republic of Ireland continues to have a larger portion 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.

- The Border region has a lower level of educational attainment than the respective jurisdictions although this is showing signs of improvement. However, the percentage without any formal education continues to increase.
- More than half (52.8%) of all registered businesses in Northern Ireland are located in the five LGDs/NUTS 3 areas that form part of the Northern Ireland-Ireland border region. It is estimated that in 2018 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 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 2020 70.8% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five NUTS 3 areas adjoining the border, which also contained 59.1% of all construction businesses, 51.6% of all transport and storage businesses, 55.1% of all production businesses, and 48.9% of all retail businesses. In contrast, the same areas only contained 27.1% of all information and communication businesses, and 36.7% of all professional, scientific and technical businesses.
- 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 were employed in manufacturing and construction in the border region than elsewhere.
- Employment rates in Mid Ulster, Armagh, Banbridge and Craigavon overperformed the overall Northern Ireland level in 2019 and while Derry and Strabane did fall below this level, it continues to show improvement.
- Fermanagh and Omagh continues to register decreasing levels of employment, falling further behind the of Local Government Districts in Northern Ireland.
- Derry and Strabane recorded the largest increase in vacancies advertised, a 44% increase in 2019/2020. Fermanagh and Omagh was the only one of the five local government districts in the Northern Ireland-Ireland border region to register a falling number of vacancies advertised, down 12%.
- Due to the Covid-19 pandemic, the number of workers working remotely has seen a drastic increase. In April 2020, 40.9% of employees in Northern Ireland were working from home, while there has been a 1264% year-on-year increase in the number of remote jobs advertised on IrishJobs.ie.

- The Border Regional Authority in the Republic of Ireland recorded a year-on-year ILO Participation Rate decrease of 1.9% with the Mid-East which includes Louth fell by 1.3% at the end of Quarter 3 2020.
- A significant percentage of workers in the Northern Ireland-Ireland border region have had to avail of the Covid-19 supports from their respective governments. At the end of July 2020, 107,600 workers (self-employed or otherwise) in the five local government districts in the Northern Ireland border region while 58,920 were registered on the relevant schemes in the Republic of Ireland.
- The five LGDs/NUTS 3 areas in Northern Ireland border area were responsible for 45% of all claims to either the Corona Virus Job Retention Scheme or the Self-Employed Income Support Scheme in at the end of July 2020.
- Payments from the Pandemic Support Payment or Temporary Wage Subsidy Scheme accounted to those in the six border counties in the Republic of Ireland accounted for 11.3% of all payments in the Republic of Ireland at the end of July 2020.
- Governmental Covid Support Payments to those in the Northern Ireland-Ireland border region accounted for 24.3% of all payments on the island of Ireland at the end of July 2020.
- The Claimant Count for Northern Ireland has recorded a year-on-year increase of 2.5% in November 2020, rising to 5.0%, to double the level for the same period from the previous year.

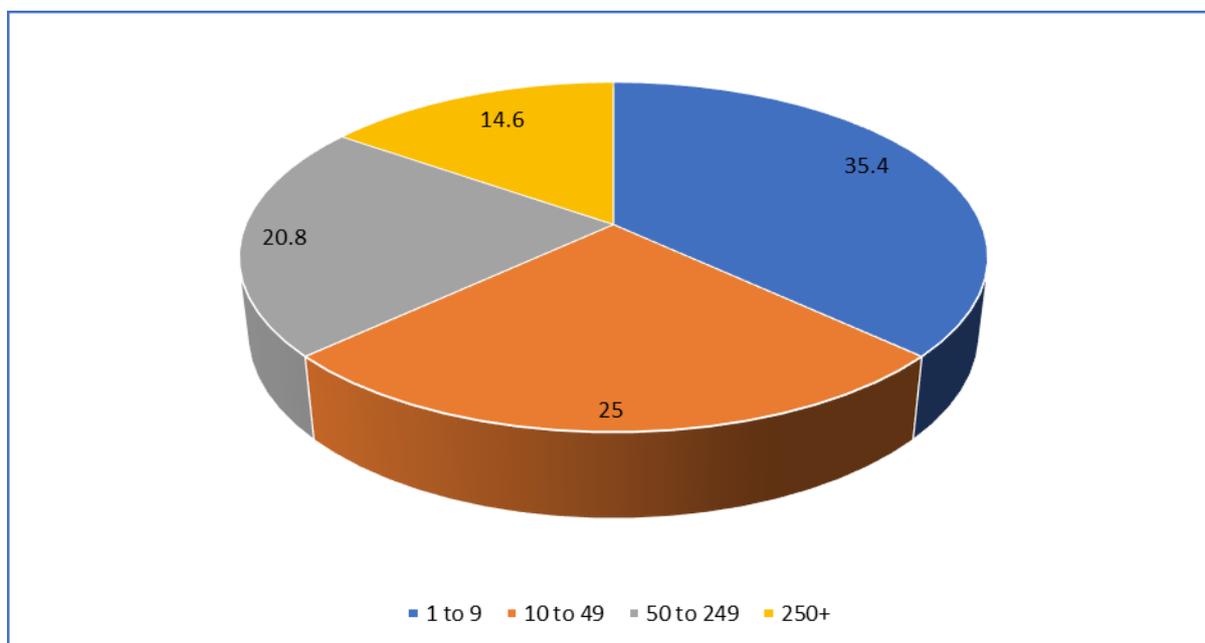
Survey of cross-border employers and results

The EURES Ireland-Northern Ireland Cross Border Partnership and the Chambers of Commerce in the Northern Ireland-Ireland border region conducted a survey of employers in the Late Summer/Early Autumn of 2020. 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, the majority of which were based in the border region and their responses recorded. Businesses were asked a series of questions (which can be seen in the Appendix) regarding their profile and their involvement with cross-border workers. Due to the Covid-19 pandemic, and the public health restrictions in place within the respective jurisdictions, several employers were unable to respond to this survey.

Profile of respondents

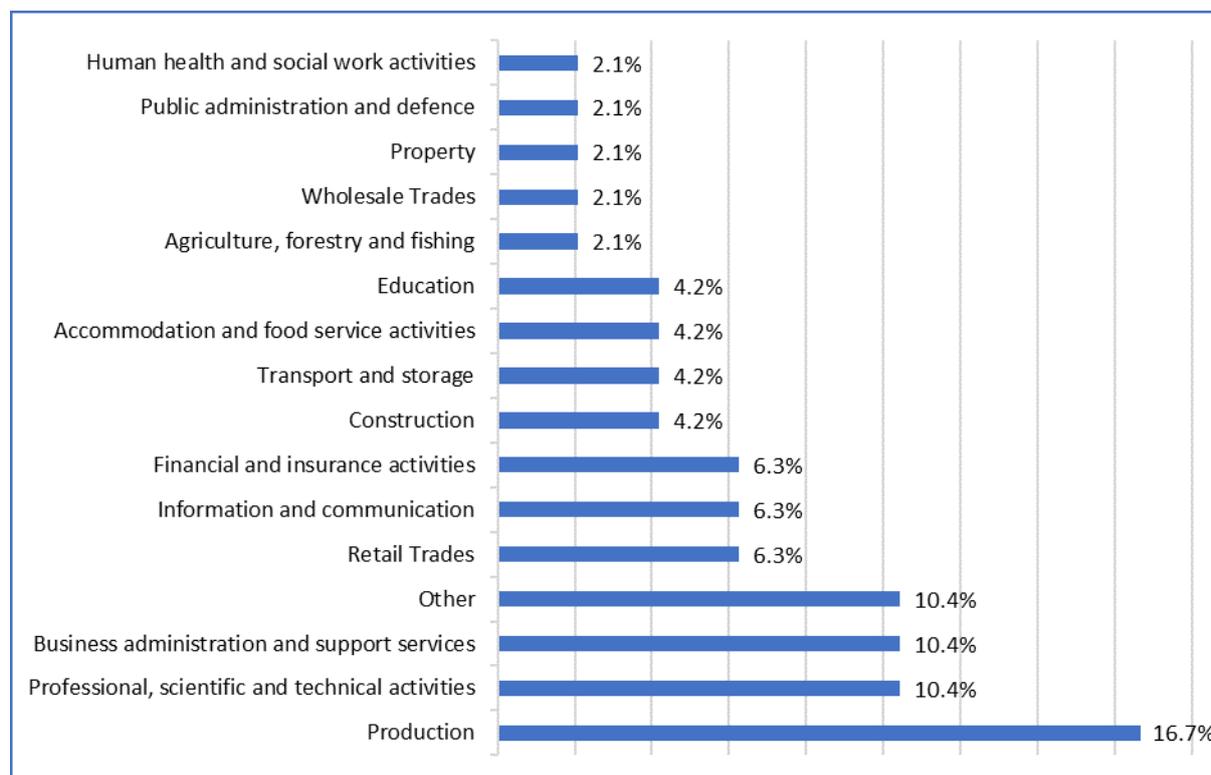
The highest number of respondents to the EURES survey were businesses employing less than 49 people, making up 64.6% of the firms. Businesses employing between 1-9 workers were the highest with 35.4%, while 25% of firms employed 10-49 workers. There was also quite a significant percentage of businesses which employ more than 50 workers with 20.8% of respondents in the 50 to 249 category, and 14.6% employing more than 250 people. This representation of businesses responding to the survey is reflective of the overall business landscape in the Northern Ireland-Ireland border region in terms of the sizes of businesses by the number of employees, and highlights the fact that whereas there may be a large number of smaller enterprises employing less than ten people, the region also includes a range of larger companies, including some employing over 250 workers.

Chart 17: Profile of businesses responding to survey (%)



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 number of participating firms coming from the production sector (16.7%). The representation of businesses from these sectors, as well as 4.2% respondents to the EURES survey coming from the construction sector, 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.

Chart 18: Nature of the main economic activity of the businesses (%)



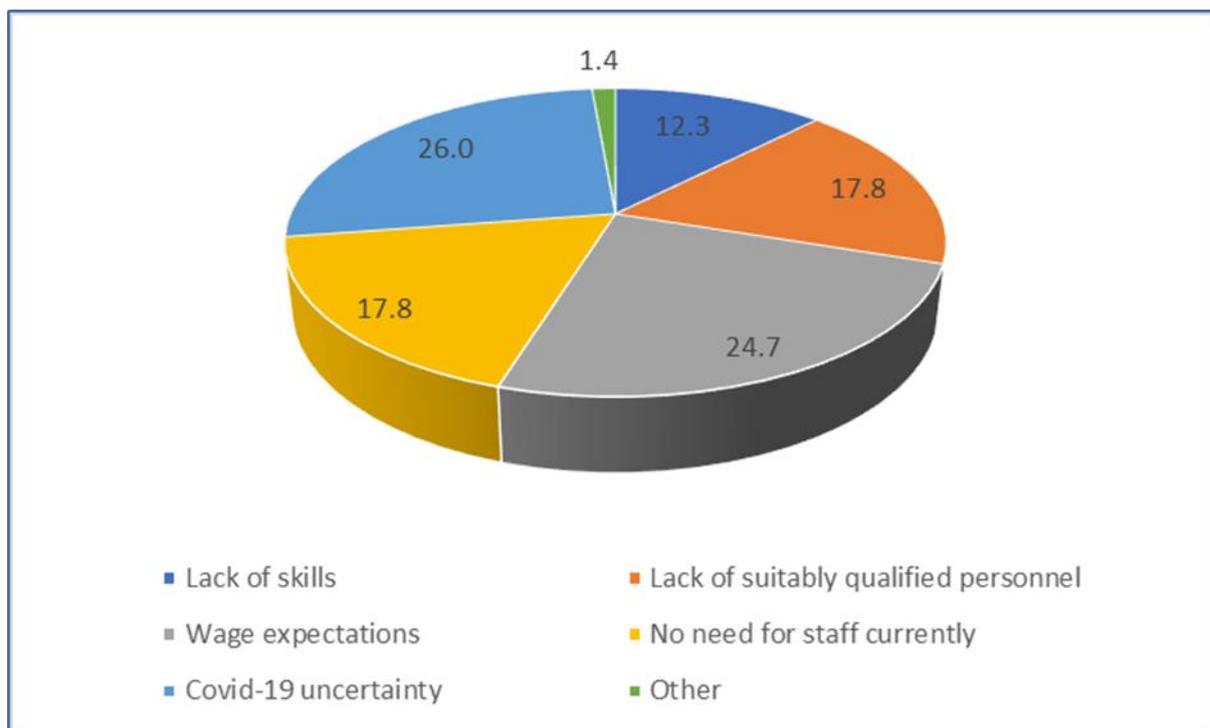
As the chart shows, 10.4% of respondents to the survey were from businesses involved in professional, scientific and technical services, with equal representation from businesses that provide administrative and support services, which are generally underrepresented areas of activity in the Northern Ireland-Ireland border region, especially on the Northern Ireland side. Given that such businesses, whilst small in number, may employ significant numbers of workers, they should be viewed as potential generators of higher-skilled and of higher wage-earning in the region. The “Other” category which 10.4% of respondents also selected included businesses from Manufacturing, Waste and Recycling, and Dentistry.

The vast majority (91.6%) of the firms who responded to the EURES survey were located 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. Louth, with 33.3%. Next was Co. Derry/Londonderry which accounted for 25% followed by Armagh with 10.4%. The location of those firms that selected the “Other” category included the “whole of the island”, and Co. Meath.

Staff Recruitment

In assessing the barriers that these businesses face in recruiting workers, this survey identified common obstacles across a range of businesses from different sectors. 26% of firms identified uncertainty surrounding Covid-19 as the main barrier to recruitment, closely followed by wage expectations with 24.7%. 17.8% of firms identified a lack of relevant skills as a challenge to recruitment for their businesses, along with 12.3% stating lack of suitable personnel was an issue when recruiting. The responses are displayed in the Chart below.

Chart 19: Barriers to general recruitment (%)

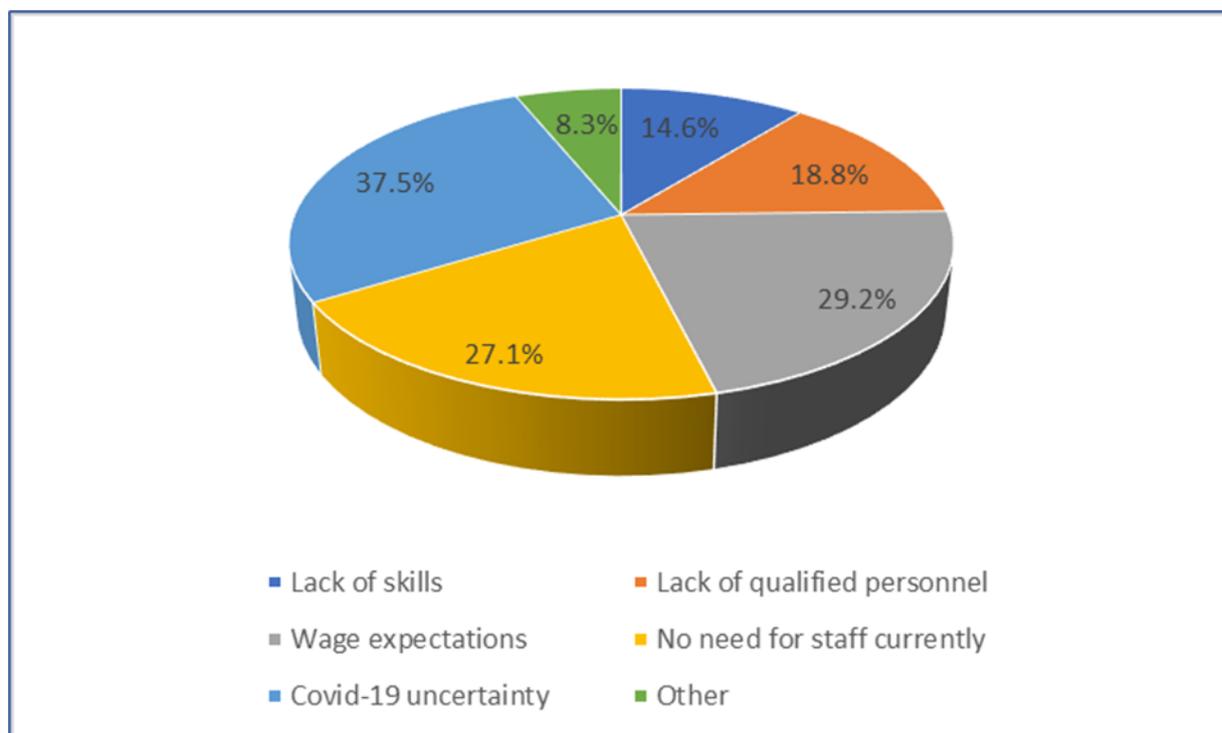


Cross Border Workers and Recruitment

Of the businesses responding to the survey, 75% stated that they employ staff who are normally resident on the other side of the border with the vast majority of these employers, 81.25%, employing less than 10 cross border workers, reflective of the overall business landscape on the island of Ireland. 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, 8.3% of respondents were from businesses employing between 10 and 49 people, and 10.4% were from enterprises employing between 50+ workers, making these not just major employers in the region, but major employers of cross-border workers.

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

Chart 20: Barriers to cross border recruitment (%)



As expected, given the current conditions, the biggest barrier that employers identified to cross border recruitment was Covid-19 uncertainty, which was selected by 37.5% of respondents. Wage expectations (29.2%) were considered to be a major barrier to cross border recruitment to businesses, something which tends to be a common issue for cross border employers, identified in the 2019 report for the European Parliament on [“Employment barriers in border regions”](#). That it is the prospect of something better that makes people choose to work across the border, in this case higher wages than on their side of the border. Differing currencies, as identified earlier in this report, can be a major factor for those seeking employment across borders as it is difficult for potential employees to accurately judge or compare salaries in the opposite jurisdiction. This is further complicated by fluctuating exchange rates making it increasingly difficult for potential employees to make informed decisions.

Lack of Skills and Lack of qualified personnel available to employers (27.1% were taken together) remains a constant and important issue for employers. These joint issues can help to be addressed by to one of the key benefits of recruiting across borders – access to a wider pool of suitably skilled and qualified potential candidates. The importance for businesses in the Northern Ireland-Ireland border region of recruiting from a wider cross-border pool could be seen as of added relevance what has been mentioned earlier in this report in terms of the lower percentages of the population in the region possessing higher qualifications.

Businesses responding under the “Other” category stated the continuing uncertainty relating to the UK’s departure from the EU has impacted on their ability to recruit cross-border workers with currency fluctuations, that would make their businesses less attractive to potential candidates from the other jurisdiction, given as an example.

Businesses response to Covid-19

The Covid-19 pandemic and the relating public health restrictions which have been introduced by governments in the respective jurisdictions on the island of Ireland have had a major impact on businesses, not just in the Northern Ireland-Ireland border region, but across the island. Of the businesses responding to the EURES survey, 31.3% expect to have to make staff redundant in the coming year due to the pandemic. This is concerning given that over 90% of responses to this survey have come from businesses in the Border region and businesses employing cross-border workers. Reasons for possible future redundancies include issues such as falling revenue, decreasing customer confidence and shopfront closures and as we have seen earlier in this study, levels of employing in the Border regions have increased in Quarter 3 of 2020.

Covid-19 has also not affected all businesses equally. Some have continued to trade throughout the pandemic and have seen an increase in volume and sales, leading to a need to increase their workforce. Those businesses deemed to provide an essential service have been able to continue to operate but even these been negatively impacted by the pandemic. Respondents to the survey have stated that the cost and burden of PPE, increased cleaning and operating with reduced staffing levels has led to increased overheads and reduced productivity with concerns over the sustainability of this effort.

When asked what supports they would like to see in order to help them deal with the pandemic, a number of businesses stated that the continuation of the current governmental supports in both jurisdictions would be very useful in helping business deal with the ongoing pandemic. As mentioned earlier, a significant number of workers in the Northern Ireland-Ireland border region have been in receipt of Covid supports in their respective jurisdiction. Several responses expressed a desire for an increase, both in terms of funding and training, on e-marketing supports to help them adapt to the changes created by the pandemic such as developing an online platform or to able remote working. Others also stated that a continuation and increase of the advice and support available to them would be useful.

The overwhelming theme of the responses relating to the impact of the UK’s leaving the EU was one of uncertainty and pessimism. The majority of respondents stated that there would be a negative impact on their business due to the UK’s exit or that they were unsure as to what the likely impact would be given the lack of clarity of a future trade deal at that time. Those businesses responding with specific examples of its impact included the possibility of a shortage of low skilled workers given the UK’s new points-based immigration scheme and the restructuring of their supply lines away from suppliers in Great Britain. Employers again stated the need for advice and support both for businesses, and cross border workers after the end of the transition period.

These concerns underline the need for jobseekers, workers and employers to be provided with relevant, authoritative and updated information that can mitigate some of the uncertainties expressed, dispel misunderstandings, and highlight the opportunities that will continue to exist.

Conclusion

In considering what the current cross-border mobility landscape means for potential decisions on how to support jobseekers, workers and employers in the Northern Ireland-Ireland border region, it is important to identify underlying issues whose resolution lies outside the region. However, there are certain characteristics of cross-border mobility that may require strategic decisions by those more closely involved in supporting such mobility, and it is these that will be addressed first.

Although according to the results from the 2016 Census in Ireland overall numbers of cross-border commuters may have declined from 2011, the importance of cross-border commuting for the purposes of work actually increased, with the decline in overall numbers being due to a fall in those crossing the border to study. This indicates a continuing need to provide support to jobseekers, workers and employers in the Northern Ireland-Ireland border region. Further, in the aftermath of the Covid pandemic and as the UK leaves the Transition period on the 31st December 2020, the need for support to jobseekers, workers and employers in the Northern Ireland-Ireland border region is greater than ever.

The Northern Ireland-Ireland border region continues to be home to a large proportion of the population on the island of Ireland while a significant percentage of businesses on the island are located there. Jobseekers, workers and employers facing the impact of Covid-19 along with the challenges and opportunities presented by the UK's exit from the EU will be better equipped and informed due to the continued and increased availability of information, advice and support at their disposal. Wage Expectations and differing Currencies in the two jurisdictions on the island of Ireland present difficulties to both cross border employers and employees especially given the currency fluctuations. At the moment it can be difficult for potential employees to make accurate wage comparisons between jobs in Northern Ireland and the Republic of Ireland, increasing the difficulty of hiring from the opposite jurisdiction for cross border employers.

The survey of businesses undertaken by the EURES Cross Border Partnership 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 and differing currencies. 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. There is also the need for advice and support for businesses as they look to adapt to the challenges posed by the Covid pandemic

such as the increased demand for remote working and for their business to have an online presence.

Appendix

Questions from the EURES Cross Border Employer Survey

1: If you are willing to proceed with the survey, please click 'Yes' below.

2: Approximately how many employees does your business employ?

0

1-9

10-49

50-249

250+

3: Which of the terms below best describes the nature of your business?

Agriculture, forestry and fishing

Production

Construction

Motor Trades

Wholesale Trades

Retail Trades

Transport and storage

Accommodation and food service activities

Information and communication

Financial and insurance activities

Property

Professional, scientific and technical activities

Business administration and support services

Public administration and defence

Education

Human health and social work activities

Arts, entertainment, recreation and other services

Other

4: Where is your business mainly based?

County Antrim

County Armagh

County Derry/County Londonderry

County Donegal

County Down

County Fermanagh

County Leitrim

County Louth

County Cavan

County Monaghan

County Tyrone

Other

5: Which of the following would you say are the biggest barriers to recruitment for your firm?

Lack of skills

Lack of suitably qualified personnel

Wage expectations

No need for staff currently

Covid-19 uncertainty

Other

6: Do you employ any staff who are normally resident on the other side of the border?

Yes

No

7: Approximately, how many cross-border employees does your company employ?

0

1-9

10-49

50-249

250+

8: Which of the following would you say are the biggest barriers to recruitment of cross border workers in your firm?

Lack of skills

Lack of qualified personnel

Wage expectations

No need for staff currently

Covid-19 uncertainty

Other

9: How has the Covid-19 Pandemic affected your business?

10: Do you expect to make staff redundant in the coming year due to the Pandemic?

Yes

No

11: What specific support would assist your business to deal with the Covid-19 pandemic'?

12: How do you think the UK decision to leave the EU will affect your business?

13: We would be grateful if you could use the space below to enter any comments or concerns regarding cross-border employment regardless of whether or not you currently employ people from any other part of the EU.

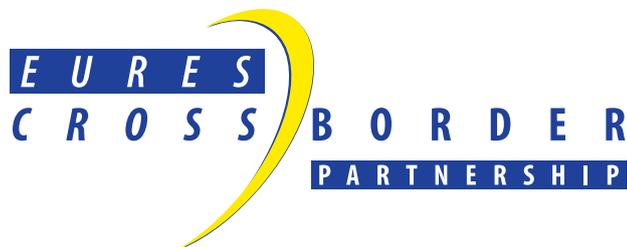
14: If you would like to be contacted by a EURES adviser who will be able to provide advice and assistance in relation to any issues with Cross-Border Employment free of charge; please use the space below to enter your company name and a suitable e-mail address for us to be able to set up a meeting.

CONTACT INFO

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Supporting the Cross Border Worker, Jobseeker and Employer

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