

Labour Market Mobility in the Border Region of Ireland: Annual Report 2023



CROSS BORDER
PARTNERSHIP
Employment Services

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Executive Summary

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

This report provides an updated analysis of cross-border labour market activity within the Northern Ireland–Ireland border region, offering a detailed picture of demographic trends, labour market participation, skills profiles, economic performance, and commuting patterns. The analysis draws on the most recent data from the respective national statistical agencies—Northern Ireland Statistics and Research Agency (NISRA) and Ireland’s Central Statistics Office (CSO)—as well as additional sources relevant to the cross-border context.

Some differences between NI and ROI census totals reflect variations in definition and methodology and may exclude self-employed or mobile workers without a fixed workplace.

The findings are intended to support the Cross Border Partnership for Employment Services (CBPES) in targeting resources effectively to meet the needs of jobseekers, workers, and employers operating in this uniquely interconnected labour market. Key findings include:

Demographic Trends

The border region accounts for almost one-fifth of the island’s population and continues to grow steadily. It has a younger-than-average population relative to each jurisdiction, with a higher proportion of residents under 15 years. However, the share of the population aged 65 and over is rising in all border areas, and projections indicate that in Northern Ireland the 65+ age group will outnumber the 0–15 cohort by 2028. This demographic shift will have significant implications for labour supply and service provision.

Education and Skills

Educational attainment in the border region lags the national averages in both jurisdictions. In Northern Ireland, most border LGDs have above-average proportions of residents with no qualifications and below-average proportions with degree-level qualifications. In the Republic’s Border NUTS 3 region, third-level attainment is the lowest in the state, with Donegal recording the weakest profile (lowest third-level attainment, highest share with only primary education). This skills gap remains a key driver of cross-border recruitment, as employers seek qualified workers from the neighbouring jurisdiction.

Labour Market Participation and Unemployment

Labour market participation in the Republic's Border region is the lowest of all NUTS 3 regions (62.3%, versus a national average of 66%). Unemployment rates in the border counties are generally higher than the national average, with Louth at 10.9% in 2022. In contrast, Northern Ireland's ILO unemployment rate is around 2%, one of the lowest in the UK. However, this is partly explained by comparatively high economic inactivity rates, meaning a smaller share of the working-age population is actively seeking work.

Economic Performance

Economic output and incomes in the border region remain below the national averages in both jurisdictions. In Northern Ireland, GVA per head is lower in all border LGDs except Mid Ulster, with Newry, Mourne & Down recording the lowest figure. In the Republic, the Border region has the lowest GVA per head and disposable income of all NUTS 3 regions, with Donegal ranked lowest among all counties. Incomes in all NI border LGDs are also below the NI average.

Business Structure

The enterprise profile of the border region is dominated by micro-enterprises (fewer than 10 employees), which account for over 85% of businesses in NI and over 92% in ROI. Agriculture, forestry, and fishing are particularly significant in NI border LGDs—most notably in Fermanagh & Omagh—while construction and wholesale/retail trade are relatively more prominent in ROI's border counties. The predominance of small-scale enterprises shapes the region's employment capacity and resilience.

Cross-Border Commuting

The Derry City & Strabane–Donegal route remains the most intensive corridor for cross-border commuting, with stronger flows from Donegal into Derry City & Strabane. All five Northern Ireland local government districts (LGDs) in the border region—Armagh City, Banbridge & Craigavon; Newry, Mourne & Down; Fermanagh & Omagh; Derry City & Strabane; and Mid Ulster—are important destinations for workers from the Republic. On the southern side, Donegal, Monaghan, Louth, and Cavan are the primary origins for commuting into Northern Ireland. Car or van travel is overwhelmingly the dominant mode of transport for cross-border workers (86% in NI).

Cross-Border Working

According to the most recent census data in both jurisdictions, just over 15,200 people based in the Northern Ireland–Ireland border region crosses the border for work, representing 83%—more than eight in ten—of all cross-border workers on the island of Ireland. The Irish Census 2022 recorded 7,777 residents commuting to Northern Ireland for work, an increase of over 700 (10.5%) since 2016, with Donegal and Derry forming the single largest commuting flow; 4,054 Donegal residents travelled to work in Northern Ireland, of whom almost 95% worked in Derry City & Strabane. On the Northern side, the NI Census 2021 found 10,541 residents working in the Republic of Ireland, with Newry, Mourne & Down (3,159), Derry City & Strabane (1,966), and Fermanagh & Omagh (1,883) accounting for two-thirds of the total. These workers span a range of sectors, from health and education to construction and manufacturing, and play a critical role in addressing skills shortages, supporting key industries, and sustaining economic activity in both jurisdictions.

Post-Pandemic Work Patterns

Working from home has become a lasting feature of the labour market, though at lower levels than during the pandemic peak. In NI, the proportion working from home fell from 41% in April 2020 to 17% by May 2021, while in ROI's 2022 Census, approximately 18% of persons aged 15 and over worked from home at least one day per week. Border counties recorded lower levels than the national average, with Donegal and Monaghan at just over 11%. Any sustained increase in hybrid or remote working could reduce daily cross-border commuting volumes, though the total number of cross-border workers may remain stable if roles continue to be based across jurisdictions.

Overall Implications

The Northern Ireland–Ireland border region remains highly integrated in terms of labour mobility, but persistent challenges related to skills, productivity, and income continue to constrain economic potential. Demographic ageing will increase pressures on the labour force, while cross-border flows will remain important for balancing labour supply and demand. Addressing the structural disparities in education, participation, and economic performance will be essential for enhancing the competitiveness and resilience of this shared labour market.

For CBPES, these findings underline the importance of targeted skills development, employer engagement, and cross-border cooperation on infrastructure and workforce planning, ensuring that both jurisdictions can respond effectively to changing demographic and economic realities.

Introduction

The overarching purpose of this report is to provide up-to-date and tangible information on cross-border activity in the Northern Ireland-Ireland region that will assist the Cross Border Partnership for Employment Services (CBPES) in supporting jobseekers, workers, and employers in the region, and to facilitate the Partnership in identifying the areas where it can employ its resources most effectively.¹ 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 CBPES, but it builds upon equivalent reports commissioned by the EURES Ireland/Northern Ireland Cross-Border Partnership from 2019 to 2021. This report will broadly follow the same structure and aims of those previous reports, providing an updated picture of cross-border activity.

There have been previous analyses from a cross-border or all-island perspective. Indeed, this report makes use of some of those analyses in certain areas to provide background and context, such as using the information provided by the censuses carried out in the respective jurisdictions in 2011, from which Ireland's Central Statistics Office (CSO) and the Northern Ireland Statistics and Research Agency (NISRA) jointly produced a report in 2014 that "for the first time [...] draws together results from both censuses and explores both similarities and differences in the two populations as well as looking at how these populations have changed over time".²

In 2018 the Department for the Economy in Northern Ireland produced "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border".³ This report had an intentional cross-border approach to its gathering and analysis of data, which not only included information on cross-border commuters, but went much further to look at subjects such as border communities and cross-border cooperation. In this case, however, the publication of what is a very valuable report was prompted by a "unique" circumstance: the United Kingdom's decision to leave the European Union.

The EURES Ireland/Northern Ireland Cross-Border Partnership had also commissioned a report in 2010 to address the need for a more accurate assessment of the nature of cross-border mobility.⁴ However, that report's primary purpose was "to provide statistics on the number of people within the North West region who commute across the Northern Ireland/ Republic of Ireland border to work", and therefore was limited in its geographical scope.

This report by CBPES aims to address cross-border mobility within a wider geographical space that includes all of Northern Ireland and the border counties of Ireland. In terms of the areas of analysis in Northern Ireland, this includes the five local government districts adjoining the Northern

¹ This report has been authored by Maureen O'Reilly (Senior Research Associate, Centre for Cross Border Studies).

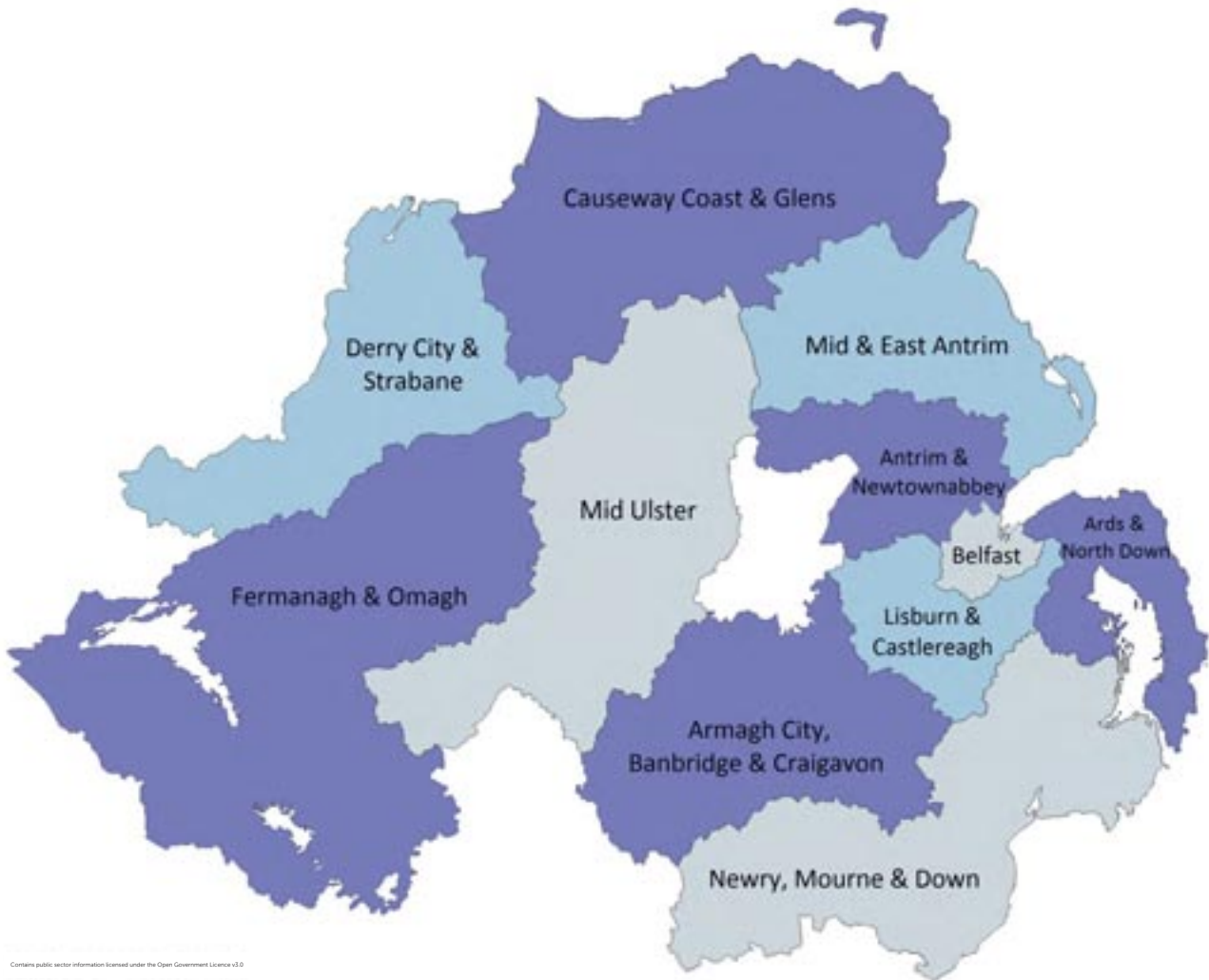
² CSO and NISRA, "Census 2011: Ireland and Northern Ireland" (June 2014), p.5.

³ Department for the Economy "Background Evidence on the Movement of People across the Northern Ireland – Ireland Border" (March 2018)

⁴ Joe Shiels and Annmarie O'Kane, Centre for Cross Border Studies, "Measuring Mobility in a Changing Island: A report commissioned by the EURES Cross Border Partnership" (May 2010), p.5.

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).⁵

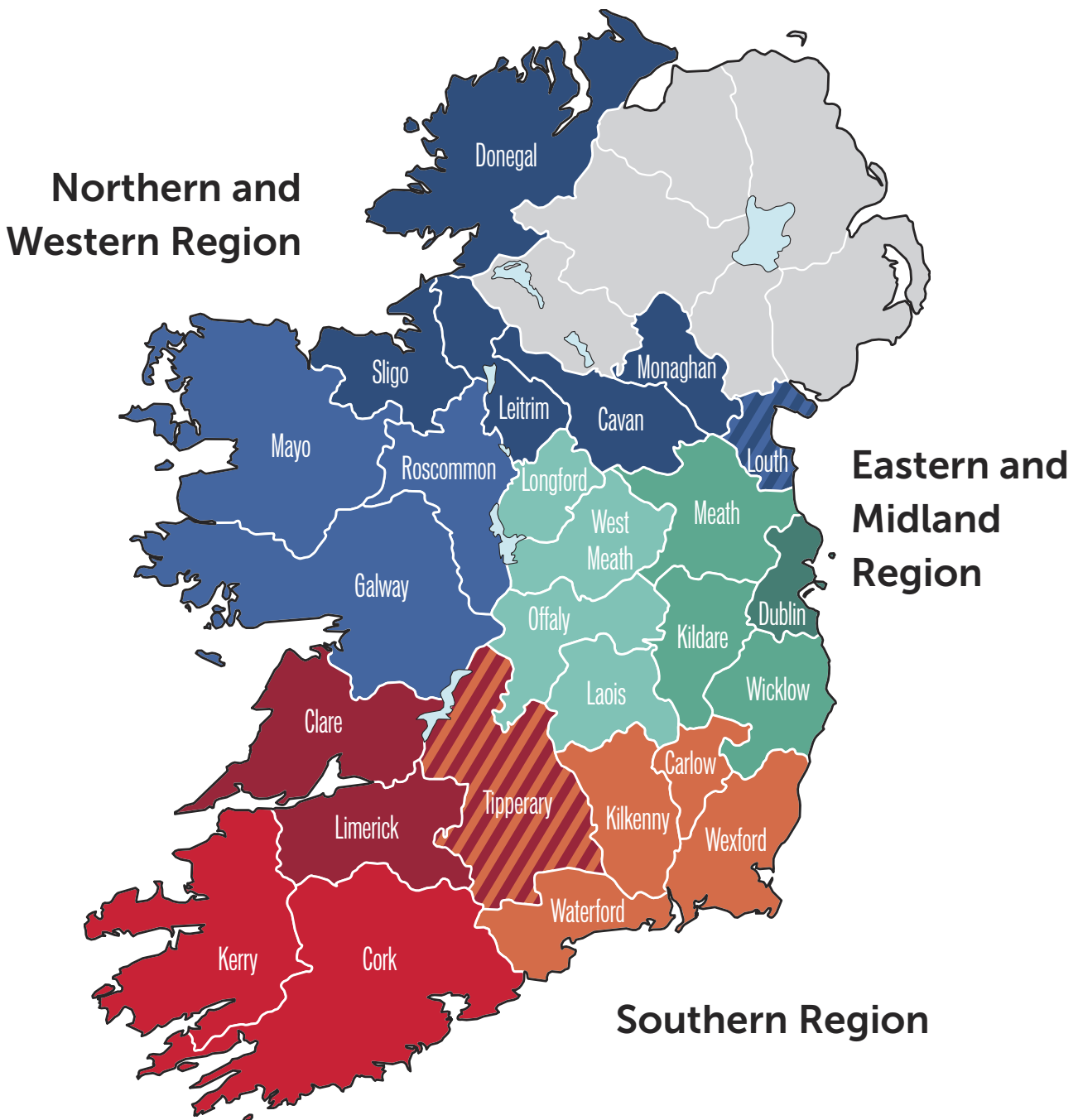
Map 1: Northern Ireland Local Government Districts



⁵ Department for Communities, Map of Northern Ireland Councils

In relation to the Republic of Ireland, the main areas of interest for this report are those counties located within the border region, specifically: Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo. It should be noted that these counties fall under two Irish administrative NUTS 3 areas. Five of the counties make up the NUTS 3 Border region: Cavan, Donegal, Leitrim, Monaghan and Sligo; while Louth is located within the NUTS 3 Mid-East region along with the non-border counties of Kildare, Meath and Wicklow. The NUTS 3 regions are in turn part of three Regional Assemblies (shown below in Map 2), which are NUTS 2 areas:⁶ Northern & Western (of which the border region is a part), Southern, and Eastern & Midland (of which the Mid-East region is a part).⁷

Map 2: Regional Assemblies (NUTS 2) in Ireland

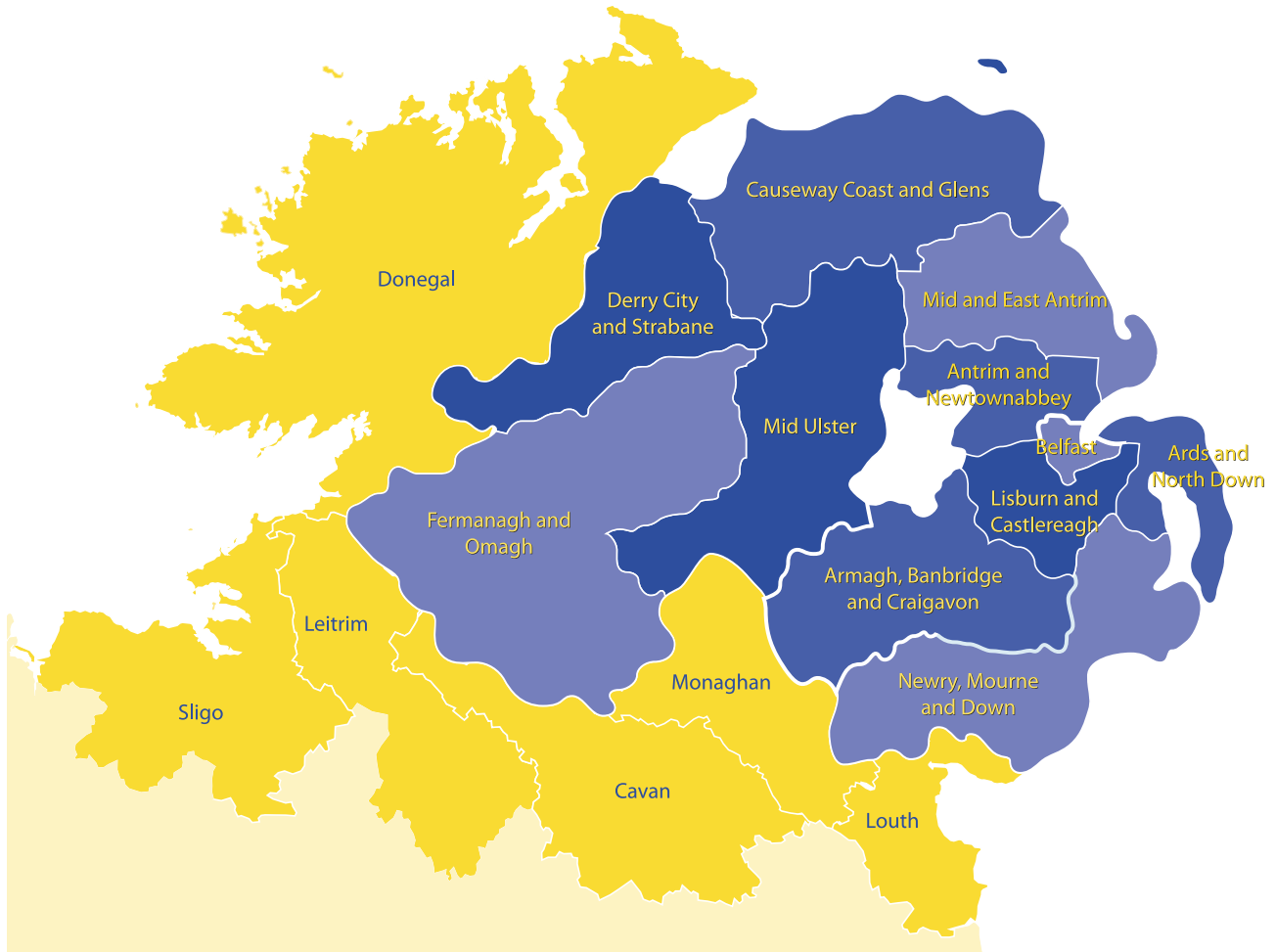


⁶ Institute of Public Administration, "Local and Regional Bodies in Ireland 2012-2016" (December 2016), p.7.

⁷ CSO, Information Note for Data Users: revision to the Irish NUTS 2 and NUTS 3 Regions.

So, while this report will also provide statistics at a national and regional level, these will be to provide context for the border region. The particular area of focus will be on the NUTS 3 regions, local government districts, and counties relating to the Northern Ireland-Ireland border region. These can be seen in Map 3 below.⁸

Map 3: NI and ROI counties



What follows in this report then, is an overview of the context in which cross-border mobility takes place on the island of Ireland, beginning with key population statistics for the Northern Ireland-Ireland border region and how these fit within their respective jurisdictional landscapes. It then offers a picture of economic activity within the region, before addressing the status of mobility across the border.

⁸ SEUPB, "PEACE IV Programme Overview".

Counting cross-border workers: the statistical challenge

As has been highlighted in previous studies of cross-border mobility, a degree of caution is necessary when engaging in discussion and analysis of those who regularly cross the Northern Ireland-Ireland border to work. The 2010 report “Measuring Mobility in a Changing Island”, commissioned by the EURES Ireland/Northern Ireland Cross-Border Partnership, alerted readers to the fact that “There are no centralised or categorised statistics recorded on the extent of cross-border mobility at all-island or regional level”.⁹ 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]”.¹⁰

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”.¹¹

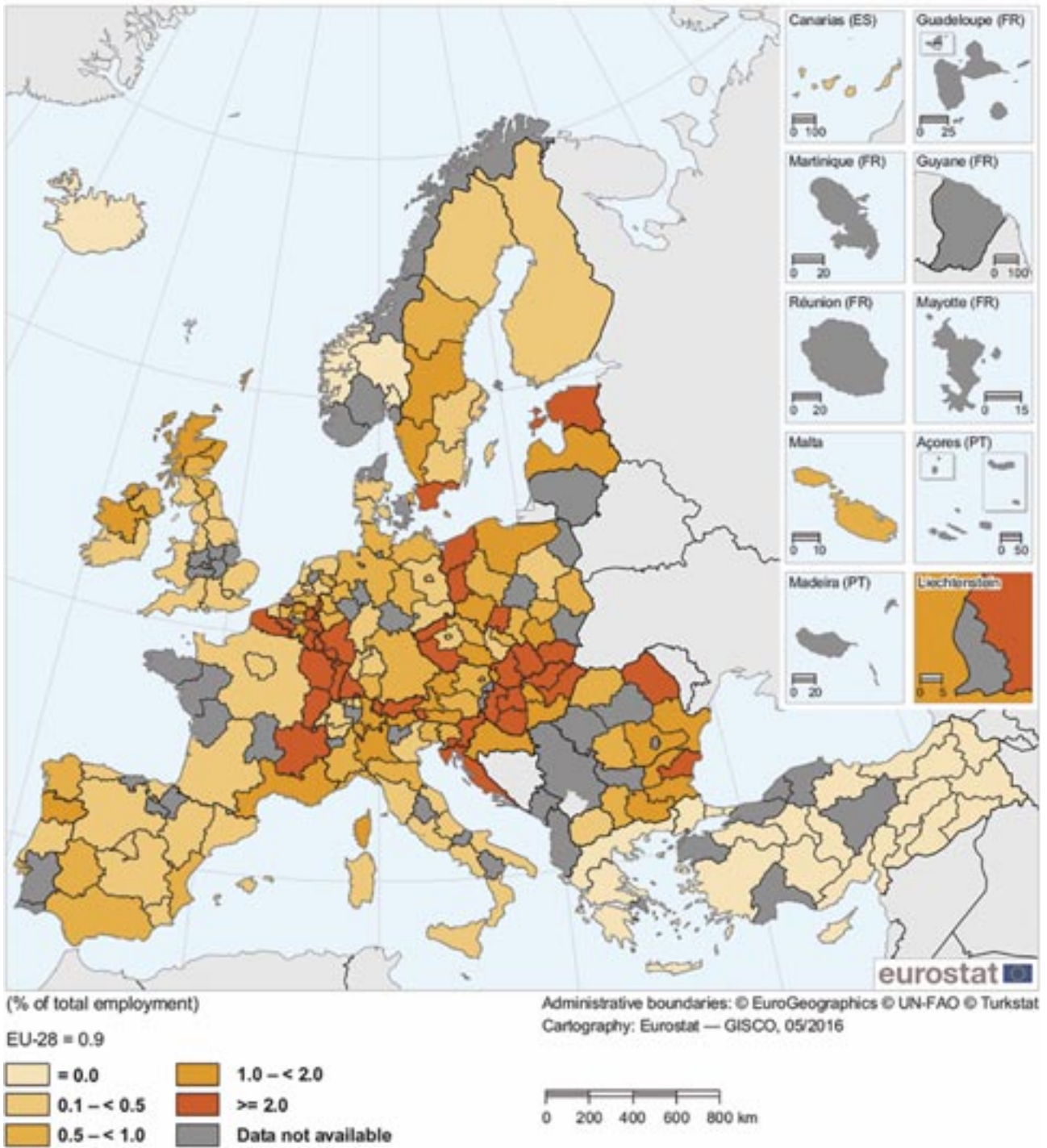
It is important to recall, therefore, that this report uses the most recent data available in each jurisdiction. However, at times this can mean that the data from each jurisdiction may relate to time periods that do not correspond neatly with each other. Nevertheless, the choice was made to use the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

⁹ Joe Shiels and Annmarie O’Kane, Centre for Cross Border Studies, “Measuring Mobility in a Changing Island: A report commissioned by the EURES Cross Border Partnership” (May 2010), p.5.

¹⁰ Department for the Economy “Background Evidence on the Movement of People across the Northern Ireland – Ireland Border” (March 2018), p.4.

¹¹ AEBR, “Information services for cross-border workers in European border regions” (October 2012) p.1.

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



Nevertheless, a report for the European Commission put the figure of cross-border workers in the EU in 2022 as comprising 1.7 million,¹² and this is simply an example of an analysis at EU-level of statistics related to cross-border mobility.

Map 4 above displays statistics on the share of total employment commuting across borders by NUTS 2 regions from the 2016 edition of Eurostat's regional yearbook.¹³ This information, while useful in setting a broader context, does not allow us to gain any insight into cross-border mobility on the areas in the Northern Ireland-Ireland border area with which this report is concerned. Moreover, as a result of Brexit more recent data produced at an EU level no longer includes the UK and, therefore, Northern Ireland.

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

The exact number of people that cross the border to work or study is difficult to quantify. The Centre for Cross Border Studies has used a variety of studies to provide an estimate that there are between 23,000 and 29,000 people who commute across the border. Based on the available information, an estimate of 25,000 trips (including daily and less regular commuters) across the border every day for work or study appears reasonable.¹⁴

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

However, due to how the question in the Census is asked, these figures will exclude self-employed people e.g., freight drivers, builders who work on both sides of the border or do not have a fixed place of work for example. They will also exclude people who work/study mainly from home but are occasional cross-border travellers (such as those working in sales or construction). Therefore, the difference in the estimates produced in the Censuses and the estimate from the Centre for Cross Border Study research can be explained by the different methodologies and questions asked.¹⁵

¹² European Commission, Annual Report on Intra-EU Labour Mobility 2022, Publications Office of the European Union (February 2023) p91 ", there were ca. 1.7 million cross-border workers reported in the EU in 2021. This is similar to the level in 2020." p42. ""The COVID-19 pandemic proved highly disruptive to cross-border work, with many Member States limiting the ability of non-citizens to enter their territory. This had knock on effects not only in terms of cross-border employees not being able to reach their place of employment, but also regarding social security coordination. The situation of cross border and frontier workers during the pandemic was raised by civil society, the European Parliament and the European Commission." p.93

¹³ Eurostat, "Share of total employment commuting across national borders, by NUTS 2 regions, 2015".

¹⁴ Department for the Economy "Background Evidence on the Movement of People across the Northern Ireland – Ireland Border" (March 2018), p.18.

¹⁵ Ibid, p.18.

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

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

Until recently, much of the context for cross-border mobility on the island of Ireland was underpinned by the frameworks, legislation, funding programmes and relevant instruments derived from Ireland and the UK's common membership of the European Union. However, as a consequence of Brexit, cross-border mobility on the island of Ireland now takes place under new frameworks. The Withdrawal Agreement and the Windsor Framework¹⁶ have sought to ensure that much of the conditions for cross-border mobility on the island of Ireland will continue to exist. Further, the UK and Irish governments' commitment to preserve the Common Travel Area (CTA), and associated rights aims to mitigate many potential issues for British and Irish nationals who cross the border regularly, with the UK government confirming that "You will not pass through any immigration control when you enter the UK from Ireland across the land border".¹⁷ However, the EU Settled Status¹⁸ and Frontier Worker Permit¹⁹ schemes implemented by the UK following Brexit have and will continue to result in increased checks on EEA nationals (residing in both Ireland and Northern Ireland) when attempting to access various services in Northern Ireland such as employment, housing, education, and healthcare. To illustrate this, by September 2023 127,440 applications to the EU Settled Status scheme were made in Northern Ireland (112,990 had been made by September 2022).²⁰ With regard to the Frontier Worker Permit Scheme, while not all of these applications will have been made with the aim of working in Northern Ireland, between Q4 of 2020 when the scheme was launched, and Q4 of 2023 (the most recent data available), 21,516 applications to the Frontier Worker Permit scheme had been made, of which 13,348 had been issued.²¹

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

Strand 2 of the 1998 Agreement established the North South Ministerial Council "to bring together those with executive responsibilities in Northern Ireland and the Irish Government, to develop consultation, co-operation and action within the island of Ireland – including through

¹⁶ The Windsor Framework is an agreement reached in February 2023 between the UK and the EU, which made changes to the Protocol on Ireland/Northern Ireland.

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

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

¹⁹ Frontier worker permit scheme guidance (2021)

²⁰ Home Office, EU Settlement Scheme quarterly statistics, September 2023 (updated 23 November 2023). The data on applications by local authority is contained in the EU Settlement Scheme local authority tables, which show that by September 2023 Armagh, Banbridge and Craigavon had received the highest number of applications in Northern Ireland (29,040), followed by Belfast (24,580), with Mid Ulster coming third (22,740).

²¹ Home Office, Why do people come to the UK? To work (updated 24 August 2023). The relevant statistics can be found in the data set "Entry Clearance Visas – Applications and Outcomes", with numbers of applications made to the Frontier Worker Permit scheme (a Visa type subgroup) available in the pivot table "Applications for entry clearance visas", and the numbers issued in the pivot table "Outcomes of applications for entry clearance visas".

implementation on an all-island and cross-border basis – on matters of mutual interest within the competence of the Administrations, North and South”.²² It also led to the establishment of six implementation bodies, including InterTradeIreland, which supports the development of cross-border trade, and the Special EU Programmes Body, which is the managing authority for PEACEPLUS, the successor to the PEACE programmes which also combines the previous INTERREG programme.

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

However, while the Northern Ireland-Ireland border region may have a number of obstacles to cross-border mobility in common with border regions in the EU, it also has others that are specifically related to the legacy of the conflict. This was reflected in the PEACEPLUS At a Glance Summary Document, which set out the background to the region in which projects to be supported by this EU funding stream would be operating in the 2021-2027 programming period:

*“Northern Ireland and the border counties of Ireland are experiencing a period of relative post-conflict stability. However, between some communities, it is still very evident that low levels of trust and high levels of residential and social segregation still exist. Issues around the expression of identity often result in community tensions and increased polarisation”.*²³

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

*“PEACE PLUS is a new cross border programme that will contribute to a more prosperous and stable society in Northern Ireland and the Border Region of Ireland. The programme will achieve this by funding peace building activities and by funding activities that contribute to the cross border economic and territorial development of the region”.*²⁴

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

²³ PEACEPLUS at a glance

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

The Cross Border Partnership for Employment Services

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

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

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

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

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

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

Information Sources

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

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

The Statistics

The following section provides a statistical profile of the Northern Ireland-Ireland border region. The Ireland Border region is defined here in accordance with the geographical focus of the Cross Border Partnership Employment Services (CBPES) to include the following border counties of Ireland: Louth, Cavan Monaghan, Donegal, Sligo and Leitrim. The CSO has defined the 'Border region' to include Cavan, Monaghan Donegal, Sligo and Leitrim and as such, the Border region Authority area, along with Louth, is referenced in the analysis below. The Northern Ireland Border region includes the 5 Local Government Districts (LGDs) or Council areas that have a border with Ireland – Armagh, Banbridge and Craigavon, Newry, Mourne & Down, Fermanagh & Omagh, Derry City & Strabane and Mid Ulster.

The profile does include a range of time periods for comparison, reflecting the different collection periods of the two jurisdictions, particularly in relation to the Censuses which were conducted in 2021 for Northern Ireland and 2022 for Ireland. Latest available data is used where possible.

Key Statistics for Northern Ireland and the Republic of Ireland

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.

Population

Mid-year population estimates for 2023 give the total population of Northern Ireland at 1,920,382. This was an increase of 9,839 on the mid-year 2022 population estimates²⁵. Population estimates for the Republic of Ireland are available for April 2023, at which time the population stood at 5,281,600, representing an increase of 3.6%, or 181,400 people on 2022,²⁶ putting the total population of the island of Ireland at approximately 7,201,982. In Northern Ireland in 2022/23 natural change (births minus deaths) accounted for approximately 2,500 of the population increase while net migration accounted for almost 7,500.²⁷ In the Republic of Ireland, natural change increased the population by 20,000 between 2022 and 2023, while net migration contributed 77,600 to the population total.

The population of Northern Ireland comprised 974,897 (50.8%) females and 945,485 (49.2%) males in 2023.²⁸ This is similar to the 2023 data for the Republic of Ireland where the population is 50.7% female and 49.3% male.²⁹ Those populations were spread across their respective jurisdictions so that in 2022 (the most recent data available) the average population density in the Republic of

²⁵ NISRA, 2023 Mid-Year Population Estimates for Northern Ireland | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

²⁶ Note that, at time of writing, the 2022 mid-year population estimates were the most recent population estimates available for Northern Ireland while the Republic of Ireland estimates were available up to 2023; CSO Population and Migration Estimates, April 2023 - Central Statistics Office

²⁷ NISRA, Statistical Bulletin - 2023 Mid-year Population Estimates for Northern Ireland (nisra.gov.uk)

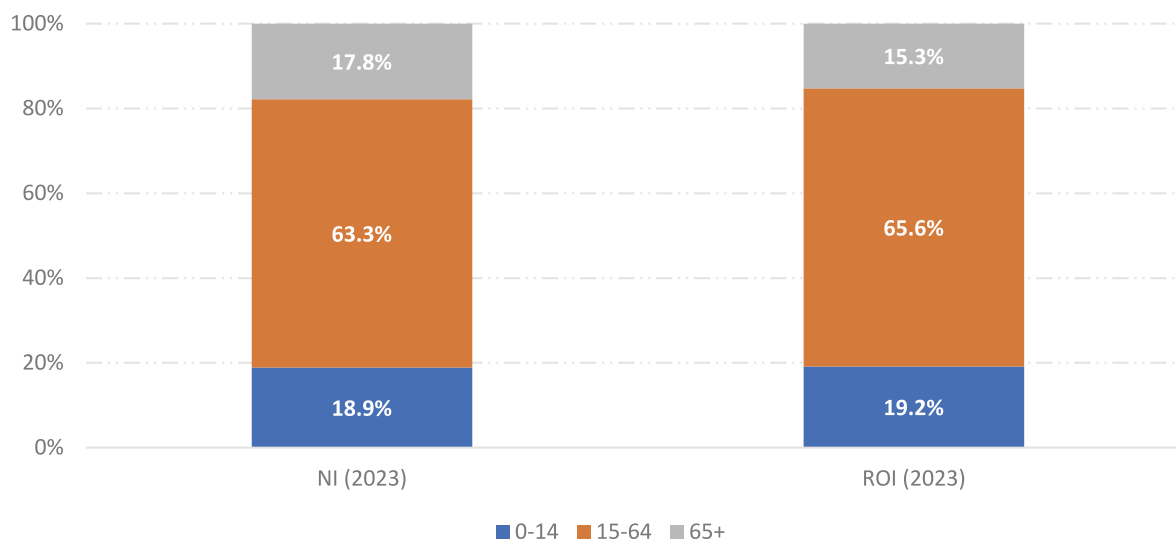
²⁸ NISRA, 2023 Mid-Year Population Estimates for Northern Ireland | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

²⁹ CSO Data Population and Migration Estimates, April 2023 - Central Statistics Office

Ireland was 73.3 persons per km²,³⁰ and in 2022 in Northern Ireland (the most recent data available) it was 141 persons per km².³¹

The age profiles of the two populations show that those aged 65 years or more in 2023 made up a greater percentage of Northern Ireland's population (17.8%) than the same cohort within the population of the Republic of Ireland in 2023 (15.3%), as can be seen in Chart 1 below.³²

Chart 1: Age profiles of the populations of Northern Ireland (2023) and the Republic of Ireland (2023)



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

*“Population increase [in Northern Ireland] was greatest in the older age groups. The number of people aged 65 or more rose by over 60,000, to nearly one-third of a million people in Census 2021 – a near 25% increase on 2011 and demonstrates the scale of population change due to ageing”.*³³

However, while those aged 65 and over in 2021 make up a larger percentage of the population in Northern Ireland than in the Republic of Ireland, the CSO noted in the 2021 Census that, “There were 742,300 people living in Ireland aged 65 and over in April 2021. Those aged 65 and over are the only group to gain population share between 2016 and 2021, increasing from 13.3% to 14.8% of the total, this equates to a volume of 112,500”.³⁴ 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 21.3% in 2023.³⁵ The percentage of the population 65 years of age and over in both jurisdictions on the island of Ireland is also below the UK average, which stood at 18.8% in mid-2022.³⁶

³⁰ F1011 - Population Density and Area Size (cso.ie)

³¹ NISRA, 2022 Mid-Year Population Estimates for Northern Ireland | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

³² NISRA, 2022 Mid-Year Population Estimates for Northern Ireland; CSO Population and Migration Estimates (April 2024)

³³ NISRA, “Census 2021 Main Statistics for Northern Ireland” Statistical Bulletin – Demography and Households, p.2.

³⁴ People Statistical Yearbook of Ireland 2021: Part 1 People and Society - Central Statistics Office

³⁵ Eurostat, “Proportion of population aged 65 and over”.

³⁶ ONS, “Estimates of the population for the UK, England and Wales, Scotland and Northern Ireland”, Mid-2022 edition of this dataset.

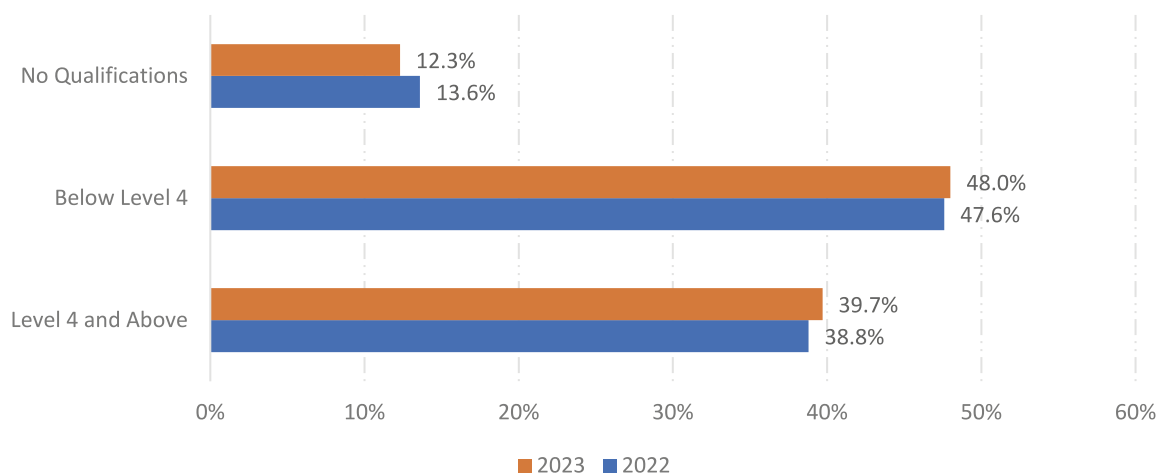
Between 2022 and 2023, the proportion of the population aged 65 years and over has increased in both jurisdictions from 17.6% to 17.8% in Northern Ireland and from 15.1% (2022) to 15.3% (2023) in the Republic of Ireland reflecting a general trend towards an ageing population in both jurisdictions.

Education and Qualifications

In terms of education, in 2019 8.8% of 18-24 year-olds in Northern Ireland were classed as early leavers from education and training, which was a decrease from 9.4% in 2018. This is currently the latest data available for Northern Ireland. In the Republic of Ireland however, the equivalent figures for 2018 and 2019 were 5.0% and 5.1% which is significantly lower than the Northern Ireland figures. Data is available up to 2023 for the Republic of Ireland and by 2023, just 4% of 18-24 year olds were classed as early leavers from education and training.³⁷

The disparity between the two jurisdictions on the island of Ireland is further shown when we look at the qualification levels of the workforce. NISRA estimates are based on the Labour Force Survey and estimates are provided for the working age population in Northern Ireland, the 16 to 64 age-group, which shows 12.3% of this cohort as having no qualifications in 2023, down from 13.6% in 2022.³⁸ Around half of the 16-64 age group in Northern Ireland (48%) have a qualification below degree level (up from 47.6% in 2022), while 39.7% have a qualification at degree level or above, up from 38.8% in 2022.

Chart 2: Highest Qualifications Attained by those aged 16-64 in Northern Ireland (2022 & 2023)

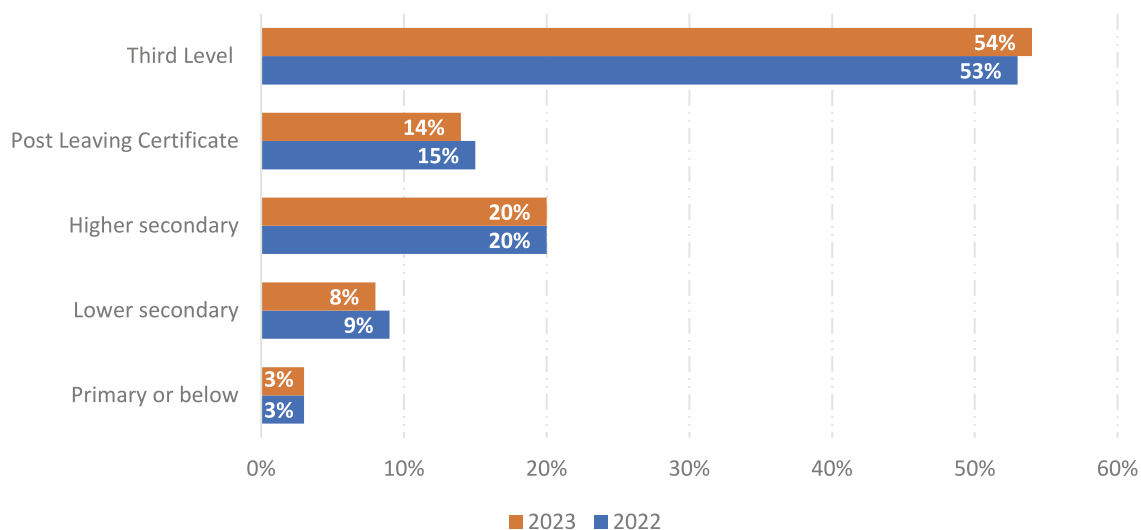


³⁷ Eurostat, "Early leavers from education and training by sex and NUTS 1 regions". The equivalent statistic for the EU-27 is 9.5%.

³⁸ NISRA, Labour Force Survey Annual Tables 2023 & Labour Force Survey Annual Tables 2022

For the Republic of Ireland, qualification levels are available for the age groups 15-64 or 25-64. The highest level of education attained by those aged 25 to 64 years is shown in Chart 3 below.³⁹

Chart 3: Highest Level of Education Attained by those aged 25-64 in RoI (2022 & 2023)



In contrast to Northern Ireland, in 2023 54% of the population of the Republic of Ireland (bearing in mind the different age categories used in relation to the two jurisdictions) possessed a third level qualification, with 14% achieving a post-leaving cert qualification, and 11% of all 25–64-year-olds in the Republic of Ireland having a lower secondary or below level of education, down from 12% in 2022.⁴⁰

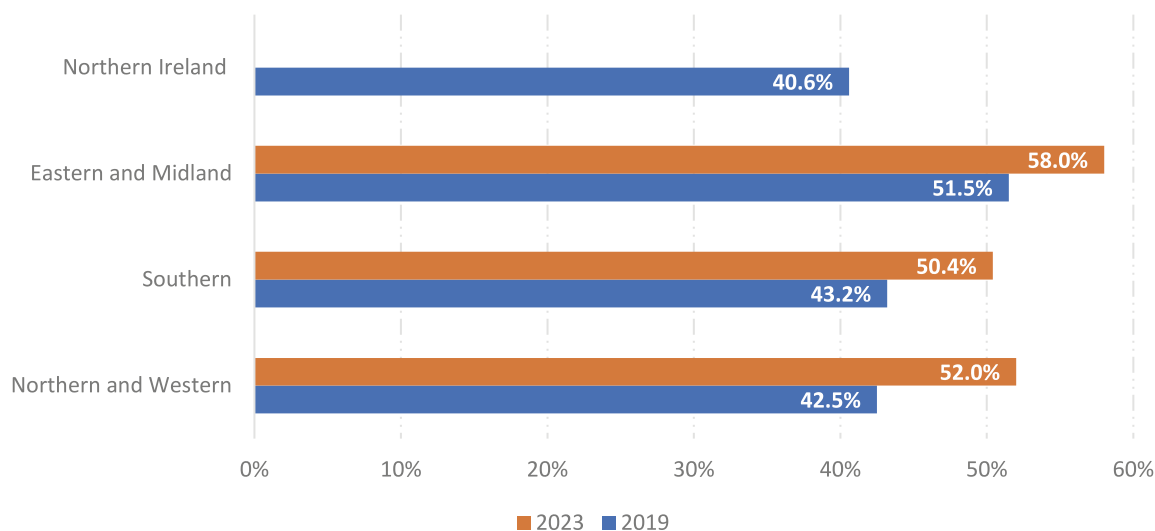
According to Eurostat, in 2019, 40.6% of those aged 25 to 64 in Northern Ireland had attained a tertiary education which was lower than that achieved across the three NUTS 2 regions in the Republic of Ireland. 2023 figures are available for the Republic of Ireland and in 2023 a higher percentage of 25 to 64 year-olds had attained a tertiary education in all three of the Republic of Ireland's Assembly Regions (equivalent to NUTS 2 regions) as shown in chart 4.⁴¹

³⁹ CSO, "Data Educational Attainment Thematic Report 2023" - Central Statistics Office

⁴⁰ CSO, "Data Educational Attainment Thematic Report 2022" - Central Statistics Office (Quarter 2, 2022)

⁴¹ Eurostat, "Tertiary educational attainment, age group 25-64 by sex and NUTS 2 regions" (TGS00109). It is important to note the following in terms of the availability of Eurostat data relating to the UK, and therefore the availability of data relating to Northern Ireland: "A new Trade and Cooperation Agreement between the European Union and the United Kingdom has been concluded and applies on a provisional basis as from 1 January 2021. It includes a provision on statistical cooperation that foresees the establishment of a specific arrangement [...]. Until this arrangement on statistical cooperation is established, addressing the scope and means of data transmission, there are changes for the dissemination of UK data by Eurostat, except for cases foreseen in the Protocol on Ireland/Northern Ireland. This means that until agreement on statistical cooperation is established, Eurostat is no longer disseminating new data for the UK, neither through its database nor in other dissemination products" (<https://ec.europa.eu/eurostat/help/faq/brexit>).

Chart 4: % of 25–64-year-olds having attained tertiary education in Northern Ireland (2019), and in each of the three Regional Assembly areas in the Republic of Ireland (2019 & latest 2023)



Given that figures from Eurostat no longer include data for the UK, we can refer to a more recent release from the NISRA Labour Force Survey (LFS) (December 2023) which provides Level 2 and above and Level 3 and above qualifications by age groups 16-24, 25-34, 35-49 and 50-64 in Northern Ireland. The qualification levels are assigned according to the National Qualification Framework (NQF) base and are broadly equivalent to the following:

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

At this point it is worth noting that the level 3 achievement includes A-level attainment, so the figures are not directly comparable with the Eurostat figures. Nonetheless, as presented in Table 1 we can see the numbers achieving level 3 and above qualifications in Northern Ireland have increased for each of the age groups presented between 2016 and 2022. While approximately 72% of persons aged between 25-34 have at least a level 3 qualification, just 53% of persons aged 50-64 have this level of qualification.

Table 1: Percentage of population with level 3 qualifications and above in NI, 2016-2022

	% with Level 3 and above qualifications		
	Age 25-34	Age 35-49	Age 50-64
2016	59.1	54.7	42
2017	60.9	58.4	41.9
2018	63.1	60.2	44.4
2019	66.3	61.3	47.2
2020	72.5	61.9	45.9
2021	69.5	68.5	49.9
2022	71.8	66.8	52.7

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 2 of 2024 stood at 66%, which is a slight increase on the same period in 2023 when the participation rate was 65.7%. The unemployment rate in quarter 2 of 2024 was 4.6%, up slightly from 4.4% in the same quarter of 2023.⁴² In Northern Ireland, the employment rate for those aged 16 to 64 was 73.6% in 2023, up from 71.9% in 2022. The unemployment rate for those aged 16 and over in 2023 was 2.2% which was unchanged from 2022.⁴³

There is, of course, mobility between the two jurisdictions on the island of Ireland for a variety of purposes, and not restricted to those living within the Northern Ireland-Ireland border region. In 2023, Northern Ireland's Department for the Economy estimated, for example, that just over 130,000 vehicles cross the border each day at 15 major crossing points, totaling 48 million vehicle crossings⁴⁴ each year (excluding traffic at other minor crossing points), with the northbound and southbound flows being relatively even.⁴⁵ This is up from 43 million in 2018 and 40 million in 2014. COVID and its impact, including the increase in hybrid working, along with UK EU Exit are important considerations in how this has changed. It also reported one transport company's (Translink, which is the main public transport provider in Northern Ireland) estimate that its flagship Enterprise train service saw over 1 million passenger journeys made on the cross-border service between Belfast and Dublin in 2022/23, the highest level in 20 years and exceeding pre-pandemic levels⁴⁶.

The profile of the Northern Ireland-Ireland Border Region

Population

Almost 1 in 5 people or 19.5% of the total population of the island of Ireland **reside in the Northern Ireland-Ireland Border region** (using 2022 NISRA mid-year population estimates and 2022 CSO population estimates data).⁴⁷ This proportion is slightly lower than the 2021 estimates. As we can see in Table 2 overleaf, the overall estimated total population in the Northern Ireland-Ireland border region increased by 0.97% between 2021 and 2022 which is more than the previous year when the population of the Northern Ireland-Ireland border region increased by 0.7%. This rate of increase in the border region was less than half of the percentage increase in the estimated total population in the Republic of Ireland, which grew by 2.2% in the year to April 2022 (from 5,074,000 in 2021 to 5,184,000 in 2022), but above that of the rate of total population growth in Northern Ireland, which saw growth of 0.3% from mid-2021 to 2022 (from 1,904,564 in June 2021 to 1,910,543 in June 2022).

⁴² CSO, Data Labour Force Survey Quarter 2 2024

⁴³ NISRA, Labour Force Survey Annual Tables 2023 & Labour Force Survey Annual Tables 2022

⁴⁴ NISRA, <https://www.nisra.gov.uk/publications/traffic-counts-vehicles-fifteen-main-northern-ireland-ireland-border-crossing-locations>

⁴⁵ Department for the Economy, "Background Evidence on the Movement of People across the Northern Ireland-Ireland Border", p.11.

⁴⁶ Translink

⁴⁷ NISRA, 2022 Mid-Year Population Estimates for Northern Ireland; and CSO, Data Population and Migration Estimates, April 2022 - Central Statistics Office. There are more recent CSO population estimates in relation to the Republic of Ireland, for April 2024. These place the population of the Border Regional Authority area at 439,800, which would represent a 4.2% increase on 2022.

Table 2: Population of the Northern Ireland-Ireland Border Region⁴⁸

	2021	2022	Change
Border – Ireland	417,100	422,200	1.22%
Louth	139,100	139,703	0.43%
Armagh, Banbridge & Craigavon	218,656	220,271	0.74%
Newry, Mourne & Down	182,074	182,634	0.31%
Derry City & Strabane	150,756	150,836	0.05%
Mid Ulster	150,293	151,001	0.47%
Fermanagh & Omagh	116,812	116,994	0.16%
Total	1,370,291	1,383,639	0.97%

Placing these trends in population growth into a historical context, and by using the CSO's 2016 Census data to capture the rates of population growth within the Border Regional Authority's constituent counties,⁴⁹ we can see that the border region grew by 6.4% between 2016 and 2022, with the population growth greatest in County Leitrim at 9.8% and lowest in County Donegal at 5%. All Border Regional Authority's constituent counties experienced significant population growth between 2016 and 2022.⁵⁰

The population is spread unevenly across this geographical area. In 2016 the population density of the Border Regional Authority Area was 35 persons per km², although Co. Louth's population density is estimated to be 156 persons per km², which would make it the second most densely populated in the Northern Ireland-Ireland border region, behind Armagh, Banbridge & Craigavon in Northern Ireland.

When examining the population densities on the Northern Ireland side of the border region there is more up-to-date data available (2022),⁵¹ with Armagh City, Banbridge & Craigavon having the highest at 165.4 persons per km² (Table 3). These disparities in terms of population densities can be seen as reflecting the region's predominantly rural nature, with a small number of urban clusters.

⁴⁸ Data for table 2 taken from NISRA 2022 Mid-Year Population Estimates for Northern Ireland; and CSO, Data Population and Migration Estimates, April 2022 - Central Statistics Office (PEA04).

⁴⁹ The term "Border Regional Authority area" is being employed in this study 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.

⁵⁰ The population growth in the other counties in the 2016-2022 period was: Cavan 7.3%, Monaghan 6.4%, and Sligo 7.1%. (Population and Actual and Percentage Change 2006 to 2022)

⁵¹ CSO, "Regional SDGs Ireland 2017 – Population density by region, 2016" and NISRA, 2022 Mid-Year Population Estimates - All areas population densities. The source for the population density of Co. Louth was Louth County Council's "Louth – Healthy County Plan 2018-2022", p.3.

Table 3: Population densities in the Northern Ireland-Ireland border region (2016/22)

	Population Density (persons per km ²)
Armagh, Banbridge & Craigavon	165.4
Co. Louth (2016)	156
Derry City & Strabane	121.9
Newry, Mourne & Down	112.2
Mid Ulster	82.8
Fermanagh & Omagh	41.3
Border Regional Authority Area (2016)	35

The Northern Ireland-Ireland border region contains a relatively higher percentage of younger people in comparison to the overall composition of the populations in the respective jurisdictions. In the Republic of Ireland in 2024, 18.8% of the population was aged 0 to 14 while the equivalent figure in Northern Ireland (2022) is 19.1%. As Chart 5 illustrates, all the areas within the geographical scope of this study had higher percentages of younger people than the jurisdictions at large (albeit marginal for some).⁵²

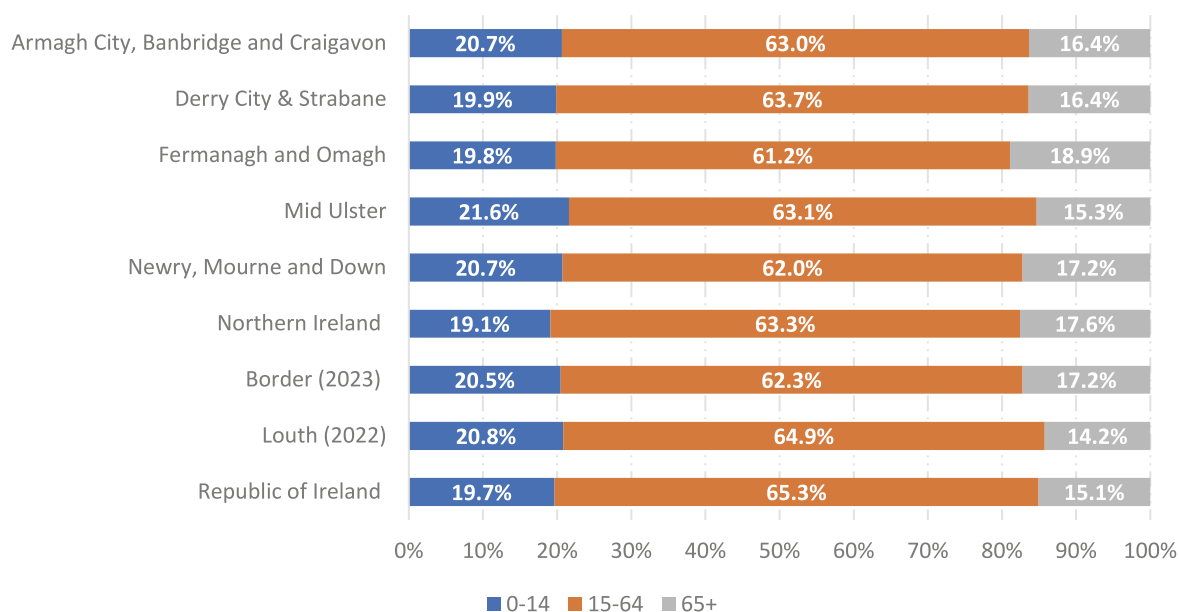
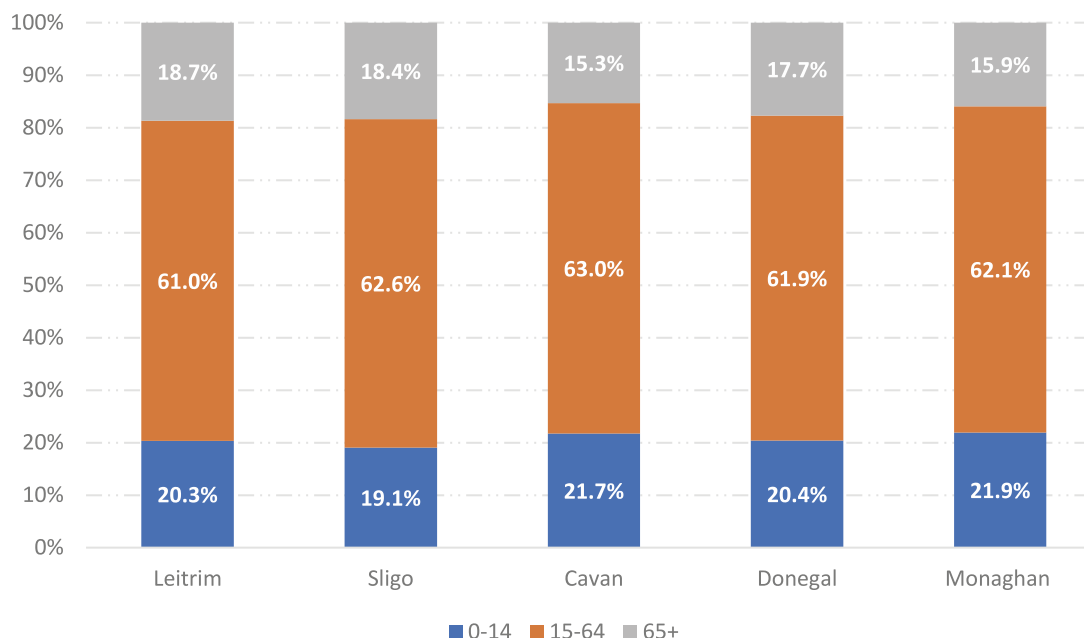
Chart 5: Age profiles of the population of the Northern Ireland-Ireland border region, % (2022)

Chart 5 shows that in 2022 Fermanagh & Omagh had the highest percentage of those aged 65 at almost 19% of the total population and well above the Northern Ireland average of 17.6%. This is also the case for the Border Regional Authority area in 2022 in relation to the overall percentage for the Republic of Ireland (17.2% compared to 15.1%). Comparing these figures with the previous year's data also shows an increase in the 65+ population in all LGDs in Northern Ireland. Newry, Mourne and Down had the largest percentage increase at 2.7% followed by Fermanagh and Omagh, which increased by 2.3% between 2021 and 2022. The overall figure for those aged 65 and over in both jurisdictions has shown an increase, rising to 17.8% (2023) from 17.6% (2022) in Northern Ireland, and to 15.1% (2022) from 14.8% (2021) in the Republic of Ireland.

⁵² 2022 Mid-Year Population Estimates, NISRA & CSO, PEA04 - Estimated Population (Persons in April)

However, 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 2022 Census.

Chart 6: Age profiles of the Border Regional Authority Area, % (2022)⁵³



According to the 2022 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 2022 stood at 15.1%. All counties, except Sligo, within the Border Regional Authority area had higher proportions of 0–14-year-olds than was the case for the Republic of Ireland as a whole (19.7%).⁵⁴ When we look at the age profile of the overall population of the island of Ireland⁵⁵, we see that the Northern Ireland-Ireland border region (except Sligo) has higher percentages of younger people relative to the overall population of the island of Ireland (19.5%), while only Cavan and Monaghan have a lower percentage of older people aged 65+. The overall island of Ireland has an estimated 64.7% of its population aged between 15 and 64 years of age, which is higher than all counties within the border regional authority area.

Education and Qualifications

Educational attainment in the Northern Ireland-Ireland border region continues to underperform in relation to general levels of attainment. This deficit can be seen in Table 4 below,⁵⁶ where a lower percentage of those aged between 16 and 64 in local government districts in Northern Ireland abutting the border had achieved a Regulated Qualifications Framework (RQF) qualification of Level 4 or above than the overall percentage for Northern Ireland in 2022 (38.8%). Of further concern is, except for Armagh City, Banbridge and Craigavon (12.7%) and Derry City and Strabane (12.8%), the LGDs abutting the border registered a higher percentage of those aged between 16 and 64 with No Qualifications compared to the national average (13.6%). The percentage of the

⁵³ CSO, Population 2022 Census.

⁵⁴ CSO, Census of Population 2022 .

⁵⁵ Based on Northern Ireland Census 2021 data and RoI, Census 2022 Data

⁵⁶ NISRA, Labour Force Survey Tables for Local Government Districts 2009-2022 .

working age population with no qualifications increased in each of these areas and Northern Ireland overall between 2021 and 2022.

Table 4: Level of Qualifications attained by % 16 to 64 year-olds in 5 NI LGDs (2022)

	RQF level 4 and above	Achieved below RQF level 4	No Qualifications
Northern Ireland	38.8%	47.6%	13.6%
Armagh, Banbridge & Craigavon	37.2%	50.1%	12.7%
Derry City & Strabane	37.5%	49.8%	12.8%
Fermanagh & Omagh	35.0%	50.4%	14.6%
Mid Ulster	35.2%	48.8%	16.1%
Newry, Mourne & Down	37.9%	47.7%	14.3%

Similarly, in Quarter 2 of 2023, 6% of those aged 25 to 64 in the Border Regional Authority area had attained primary education only (no change from the previous year), compared with 3% of the total population (also unchanged from the previous year). In Quarter 2 of 2023 54% of the total population in the Republic of Ireland had achieved a Higher Cert or above (a 1% increase on Q2 2022), only 48% had achieved this in the Border Regional Authority area (unchanged from Q2 2022).⁵⁷ We can see below how this compares with more historical data.

The 2022 CSO Census results allow us, in Table 5, to look at the percentage of those aged 15 years and above in the constituent counties of the Border Regional Authority Area and Co. Louth with third level qualifications, as well as those with no formal or only primary education.⁵⁸

Table 5: % of those aged 15 and over with 3rd level education, or no formal or only primary education (2022)

	3 rd Level	No formal or only primary
Republic of Ireland	44.9%	9.8%
Donegal	36.8%	16.2%
Leitrim	42.2%	11.4%
Sligo	44.5%	9.5%
Cavan	37.7%	13.0%
Monaghan	36.6%	13.8%
Louth	39.6%	12.0%

All the counties included in the above table registered lower percentages of those with a third level education (albeit Sligo marginally so), than the equivalent figures for the Republic of Ireland in 2022. With regards to no formal or only primary education, all counties except Sligo had a higher percentage who had no formal or only primary education than the average for the Republic of Ireland overall.

In terms of the nature of the labour market in the Northern Ireland-Ireland border region, given the differences in how data is gathered in the two jurisdictions, we will look at how the

⁵⁷ CSO, "Persons Aged 25-64 by Region, Sex, Education Level and Quarter".

⁵⁸ CSO, Data Census of Population 2022 Profile 8 - The Irish Language and Education - Central Statistics Office.

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 2023. Highlighting those abutting the border, Table 6 displays the (2023) 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.⁵⁹

Table 6: Employment rate of 16–64-year-olds in Northern Ireland by LGD (2022 & 2023)

	2022	2023	Change
Mid and East Antrim	76.9%	79.5%	2.6%
Newry Mourne and Down	74.9%	78.8%	3.9%
Antrim and Newtownabbey	74.8%	78.5%	3.7%
Lisburn and Castlereagh	75.0%	77.8%	2.8%
Armagh City, Banbridge and Craigavon	75.2%	76.6%	1.4%
Ards and North Down	72.8%	75.5%	2.7%
Mid Ulster	73.8%	74.9%	1.1%
Northern Ireland	71.9%	73.6%	1.7%
Fermanagh and Omagh	73.3%	70.6%	-2.7%
Causeway Coast and Glens	67.6%	68.3%	0.7%
Belfast	65.5%	67.9%	2.4%
Derry City and Strabane	67.6%	65.4%	-2.2%

Three of the five border Local Government Districts in NI displayed employment rates above the Northern Ireland average of 73.6%, while the remaining two, Fermanagh & Omagh (70.6%) and Derry & Strabane (65.4%) fell below. Fermanagh & Omagh and Derry City & Strabane are the only two LGD's to see a fall in the employment rate between 2022 and 2023.

The International Labour Organisation (ILO) defines unemployed as “those aged 16 and over without a job who were able to start work in the two weeks following their LFS interview and had either looked for work in the four weeks prior to interview or were waiting to start a job they had already obtained”.⁶⁰ An estimated 17,000 people (aged 16-64) in Northern Ireland were unemployed for the period May-July 2024,⁶¹ giving an unemployment rate of 2.0%. Northern Ireland's low ILO unemployment rate partly reflects its comparatively high level of economic inactivity, with a significant share of working-age people outside the labour force due to study, caring responsibilities, or long-term illness

The Claimant Count consists of “all people claiming Jobseeker's Allowance (JSA) plus those Universal Credit (UC) claimants who were claiming principally for the reason of being unemployed. Some claimants are wholly unemployed and seeking work, while others may be employed but with low earnings that make them eligible for unemployment related benefit support”.⁶² In July 2024, the total number of claimants in Northern Ireland stood at 41,755, which represents 3.5% of

⁵⁹ NISRA, Labour Market Structure 2023 & Labour Market Status 2022.

⁶⁰ Northern Ireland Labour Market Report (nisra.gov.uk)

⁶¹ NISRA, Labour Market Report – September 2024

⁶² Northern Ireland Labour Market Report (nisra.gov.uk)

the Northern Ireland workforce (aged 16-64).⁶³ Fermanagh & Omagh has the highest claimant count at 5.3% followed by Causeway Coast and Glens at 4.5%.⁶⁴ Table 7 shows the proportion of residents aged 16 to 64 claiming unemployment-related benefits in September 2024, ranking all eleven local government district areas from the highest to the lowest, and including the overall figure for Northern Ireland.

Table 7: Claimant Count as proportion of resident population aged 16-64 (July 2023 & 2024)

	July 2023	July 2024	% Change
Fermanagh and Omagh	4.9	5.3	0.4
Causeway Coast and Glens	4.1	4.5	0.4
Derry City and Strabane	3.2	3.6	0.4
Antrim and Newtownabbey	3.1	3.5	0.4
Ards and North Down	2.9	3.4	0.5
Mid Ulster	3	3.3	0.3
Belfast	2.8	3.2	0.4
Lisburn and Castlereagh	2.3	3.1	0.8
Northern Ireland	2.7	3.1	0.4
Newry, Mourne and Down	2.2	2.9	0.7
Armagh City, Banbridge and Craigavon	2.4	2.7	0.3
Mid and East Antrim	1.9	2.2	0.3

As can be seen in Table 7 above,⁶⁵ there has been a small increase in the proportion of the Northern Ireland population aged 16 to 64 claiming unemployment-related benefits over the course of the last year. The working age claimant count for Northern Ireland has increased from 2.7% in July 2023 to 3.1% in July 2024. All eleven LGDs have seen an increase in the working age claimant count rate but while Lisburn and Castlereagh and Newry, Mourne and Down experienced the greatest increases, they are still ranked among the lowest.

Only three LGDs fall below the Northern Ireland average of 3.1%, two of which fall along the Northern Ireland-Ireland border region. Fermanagh & Omagh had the highest working age claimant count rate while Mid & East Antrim has remained the lowest.

Table 8 sets out the ILO participation rate of those aged 15 years and over in all NUTS 3 regions in the Republic of Ireland in Quarter 2 of 2023 and 2024, and the overall national rate, ranking them from highest to lowest.⁶⁶

⁶³ The claimant count 'consists of all people claiming Jobseeker's Allowance (JSA) plus those Universal Credit (UC) claimants who were claiming principally for the reason of being unemployed. Some claimants are wholly unemployed and seeking work, while others may be employed but with low earnings that make them eligible for unemployment related benefit support' (Northern Ireland Labour Market Report).

⁶⁴ NISRA Claimant Count Tables - September 2024

⁶⁵ NISRA, Claimant Count Monthly Data.

⁶⁶ CSO, Table QLF08 - Persons aged 15 years and over by region and quarter

Table 8: ILO Participation Rate by NUTS 3 region in the Republic of Ireland % (Q2 2023 & 2024)

	Q2 2023	Q3 2024	% Change
Dublin	69.1	69.6	0.5
Mid-East	67.2	67.1	-0.1
Republic of Ireland	65.7	66.0	0.3
South-West	64.9	65.6	0.7
West	65.0	64.1	-0.9
Mid-West	63.4	63.6	0.2
South-East	61.6	63.4	1.8
Midland	63.9	63.2	-0.7
Border	61.7	62.3	0.6

The Border records the lowest labour market participation rate in Quarter 2 2024 at 62.3% compared to a national average of 66%. Only three of the regions experienced a fall in the ILO Participation rate between Q2 2023 and Q2 2024. The West fell by 0.9 percentage points while the Mid-East was just 0.1 percentage points lower than the same period in the previous year.

To capture the labour market at county level, Table 9 sets out the labour force participation and unemployment rates for Co. Louth and the constituent counties of the Border Regional Authority area, taken from the CSO's 2022 Census, with the same figures at national level.⁶⁷

Table 9: Labour force participation & unemployment rates of persons aged 15 and over (2022)

	Labour Force Participation Rate	Unemployment Rate
Republic of Ireland	61.2%	8.3%
Donegal	57.2%	10.6%
Leitrim	58.2%	9.3%
Sligo	58.3%	8.4%
Cavan	60.9%	9.3%
Monaghan	61.0%	8.2%
Louth	60.0%	10.9%

All counties included in the above table, except Monaghan, registered higher rates of unemployment in 2022 than the overall national rate of 8.3%. Louth had the highest unemployment rate at 10.9% while Monaghan had the lowest at 8.2%. With regards the labour force participation rate, all counties registered a lower rate than Ireland's overall rate of 61.2%, although Monaghan was just 0.2% below and Cavan only 0.3% below the national rate. All counties listed in the table have seen a great improvement in the unemployment rate since the 2016 Census with Donegal witnessing the greatest fall of 7.4 percentage points.

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.

⁶⁷ CSO, Rates for Labour Force Participation and Unemployment (Table FY056A).

Gross Value Added

Table 10 sets out the Gross Value Added (GVA) per head, a measure of economic output in each of the 11 NI local government district areas in 2021 and 2022, ranking them from highest value of goods or services produced per person to lowest, and including the overall rate for Northern Ireland.⁶⁸ However, it is important to remember that this statistic refers to the value of goods and services produced per person in each location, and therefore those actually producing those goods and services may not be residents of that location and could be commuting there from another place.

Table 10: GVA per head (£) for LGDs (NUTS 3 areas) in Northern Ireland (2021 & 2022)

Region name	2021	2022
Belfast	43,414	46,513
Mid Ulster	25,024	27,712
Northern Ireland	24,254	26,119
Lisburn and Castlereagh	23,871	26,061
Antrim and Newtownabbey	24,317	25,629
Fermanagh and Omagh	21,220	22,737
Derry City and Strabane	20,680	22,682
Armagh City, Banbridge and Craigavon	19,423	20,770
Mid and East Antrim	18,550	19,892
Newry, Mourne and Down	18,193	19,745
Causeway Coast and Glens	16,449	17,719
Ards and North Down	13,744	14,259

As we can see in Table 10, apart from Mid Ulster (£27,712), in 2022 the LGDs (NUTS 3 areas) which are part of the Northern Ireland-Ireland border region fall below the overall Northern Ireland average for GVA per head (£26,119), with Newry, Mourne & Down the lowest ranked of the Northern Ireland border region (£19,745). As well as being below the Northern Ireland average, Ards & North Down is the lowest of all LGDs (NUTS 3 areas) in the UK while Causeway Coast & Glens is the fourth lowest. Belfast, as the highest ranked area in Northern Ireland, is above the overall Northern Ireland GVA and is also 16th in the overall UK standings.

In the Republic of Ireland, Dublin (in a similar manner to Belfast) outstripped all other locations in the Republic in terms of estimated GVA per head in 2021; with the Republic's overall GVA per head standing at €81,573 in 2021 (increasing by 14.3 percentage points from 2020), Dublin's was €132,259 (an increase of 11.5 percentage points on 2020). Bearing in mind that no figures are available for GVA per head for the Mid-West or South-West,⁶⁹ Table 11 shows where the Border Regional Authority area and the Mid-East (which includes Co. Louth) were placed in relation to all other NUTS 3 areas for GVA per head in 2021.⁷⁰

⁶⁸ Office for National Statistics, "Regional gross value added (balanced) per head and income components"

⁶⁹ The CSO's explanation for the absence of figures for these two areas is "suppressed for reasons of confidentiality". Also note that the data for 2020 is preliminary.

⁷⁰ CSO, Table RAA05 - Gross Value Added, Taxes and Subsidies.

Table 11: GVA per head (€) for NUTS 3 areas in the Republic of Ireland, excluding the Mid-West and South-West (2020 & 2021)

Region name	2020	2021	% Change
Dublin	118,620	132,259	11.5%
Republic of Ireland	71,376	81,573	14.3%
West	40,065	43,541	8.7%
Mid-East	36,616	40,450	10.5%
South East	36,253	35,602	-1.8%
Midland	23,379	24,661	5.5%
Border	21,881	24,228	10.7%

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 2020 and 2021, Dublin significantly outperforms all other regions of the country in terms of GVA. The Border Regional Authority area was lower than all other areas in terms of the value of goods or services produced per person. It is, however, important to note that the Border Regional Authority area did record an increase in its GVA of 10.7 percentage points between 2020 and 2021. Again, it is also important to recall that a proportion of the population of the Border Regional Authority Area may be commuting to another area where they will be contributing to that area's GVA.

To reach a better understanding of the economic status of the population of the Northern Ireland-Ireland border region, given that some people may be commuting elsewhere to work, we can look at the levels of disposable income in the border region. Table 12 sets out the gross disposable household income (GDHI) per head across the LGDs (NUTS 3 areas) of Northern Ireland in 2019 and 2020, as estimated by the Office of National Statistics.⁷¹

Table 12: GDHI per head (£) for LGDs (NUTS 3 areas) in Northern Ireland (2021 & 2022)

Region name	2021	2022
Northern Ireland	17,635	18,685
Belfast	17,367	18,276
Armagh City, Banbridge and Craigavon	17,285	18,389
Newry, Mourne and Down	17,088	18,073
Ards and North Down	19,025	20,166
Derry City and Strabane	16,593	17,520
Mid Ulster	17,455	18,468
Causeway Coast and Glens	17,748	18,911
Antrim and Newtownabbey	17,757	18,925
Lisburn and Castlereagh	19,296	20,450
Mid and East Antrim	17,743	18,813
Fermanagh and Omagh	17,027	18,127

⁷¹ ONS, "Regional gross disposable household income: all NUTS level regions 1997-2020".

There are two striking features from the above table. One is that Belfast, despite being the LGD (NUTS 3 areas) that saw by far the highest value of goods and services being produced per person in 2021 in all of Northern Ireland (and even ranking among the top 20 in all of the UK), it is also an area where the disposable income of its population (£18,276) is lower per head than that of the overall figure for Northern Ireland (£18,685). The second is that all Northern Ireland's LGDs (NUTS 3 areas) within the Northern Ireland-Ireland border region have households with, on average, lower gross disposable income per head than the Northern Ireland average. Mid Ulster is the highest with £18,468 per person, while Derry City and Strabane is the lowest with £17,520. These are continuing trends, identified in reports previously undertaken for the EURES Cross Border Partnership.

The levels of estimated disposable income per head across the Republic of Ireland's NUTS 3 areas in 2020 and 2021 are shown in Table 13.⁷²

Table 13: Disposable income per person (€) for NUTS 3 areas in the Republic of Ireland (2020 & 2021)

	2020	2021
Dublin	25,949	27,958
Republic of Ireland	23,390	24,376
West	21,782	22,593
Mid-East	23,449	23,879
South East	21,836	22,411
Midland	20,978	21,725
Border	20,008	20,445
South-West	23,433	24,032
Mid-West	23,190	23,770

Dublin had the highest disposable income per head of all the NUTS 3 areas in the Republic of Ireland in 2021 (Table 13), and as was shown above in Table 11, it also had the highest GVA per head in 2021 (€132,259). Dublin was the only NUTS 3 area in the Republic of Ireland to outperform the national average for disposable income per person (€24,376) in 2021. By contrast five areas outperformed the Northern Ireland average gross disposable household income (GDHI) per head in 2020 and 2021. While the Mid-East includes Co. Louth, Table 13 shows the Border area as having the lowest disposable income per person.

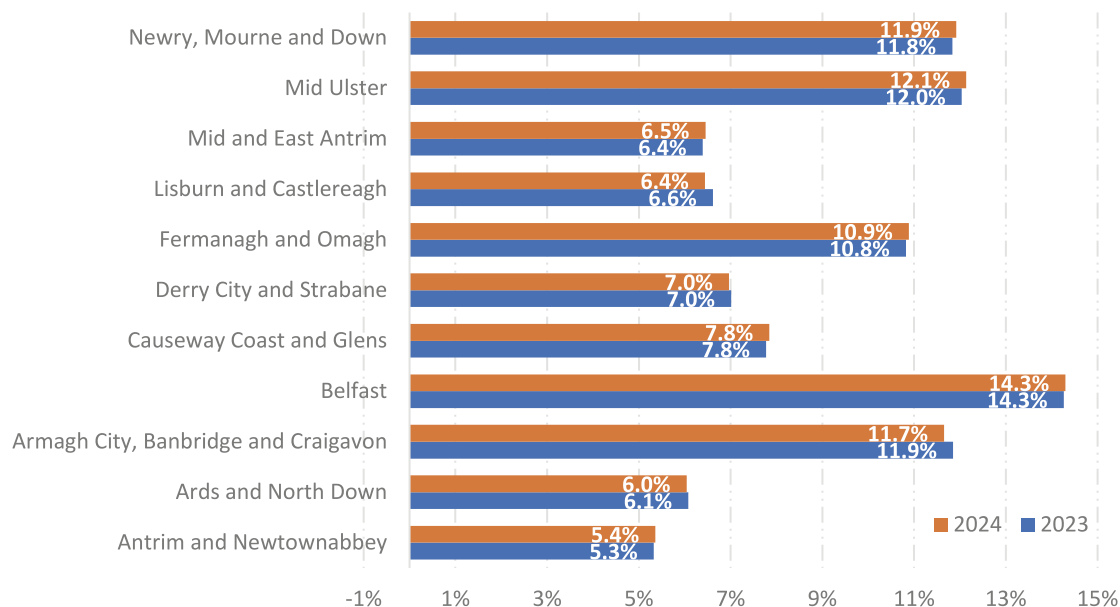
Preliminary estimates at county level show that in 2021 Co. Donegal had the lowest levels of disposable income per person (€19,252.82) of all Republic of Ireland counties. Of those counties in the Northern Ireland-Ireland border region, Co. Louth had the highest level of disposable income per person (€24,152.58), followed by Co. Monaghan (€21,516.29), Co. Sligo (€21,207.14) and Co. Leitrim (€21,168.81). As was the case in previous reports, Co. Donegal's figures were the main contributor to the low overall figure for the Border Regional Authority area (€20,445)

Opportunities for employment within the Northern Ireland-Ireland border region can begin to be assessed by the number of active businesses located within it, and the percentage this represents

⁷² CSO, Data County Incomes and Regional GDP 2021 - Central Statistics Office

of businesses within the respective jurisdictions. In Northern Ireland, for example, there were 80,045 registered businesses in 2024, an increase of 810 active businesses from 2023 (79,235). As was the case in previous years, the LGDs (NUTS 3 areas) abutting the border held a significant share of businesses in 2024, as shown in Chart 7.⁷³

Chart 7: % Share of VAT/PAYE registered businesses by LGD (NUTS 3 area) in Northern Ireland (2023 & 2024)



Belfast has the highest percentage of registered businesses in Northern Ireland in 2024 with 14.3% (11,445) of active businesses in Northern Ireland located in the area. Repeating a pattern noted in previous reports, the five LGDs (NUTS 3 areas) in the Northern Ireland-Ireland border region account for a total of 53.6% of active businesses in Northern Ireland, with, Mid Ulster, accounting for 12.1% or 9,715 of all Northern Ireland businesses. Of the five LGDs (NUTS 3 areas), Armagh City, Banbridge and Craigavon was the only LGD to register a decrease in the number of businesses falling from 9,390 in 2023 to 9,330 in 2024 (-0.6%). Newry, Mourne and Down and Mid Ulster both registered a 1.8% increase in the number of VAT and / or PAYE registered businesses. As we will see in Chart 8 below, Northern Ireland has a more evenly spread share of businesses across its LGDs (NUTS 3 areas) when compared to the Republic of Ireland.

Figures for 2021 show that there were 365,766⁷⁴ active enterprises in the Republic of Ireland, an increase of 21,622 on 2020 (344,144). Chart 8 below sets out how they were dispersed across the NUTS 3 areas.⁷⁵ 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 not⁷⁶. The Census of Agriculture 2020 estimates a total of 135,037 farms in Ireland, approximately 2,400 less than there were in 2016.

⁷³ 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, 2013-2024", in NISRA, Current Publication and IDBR Tables

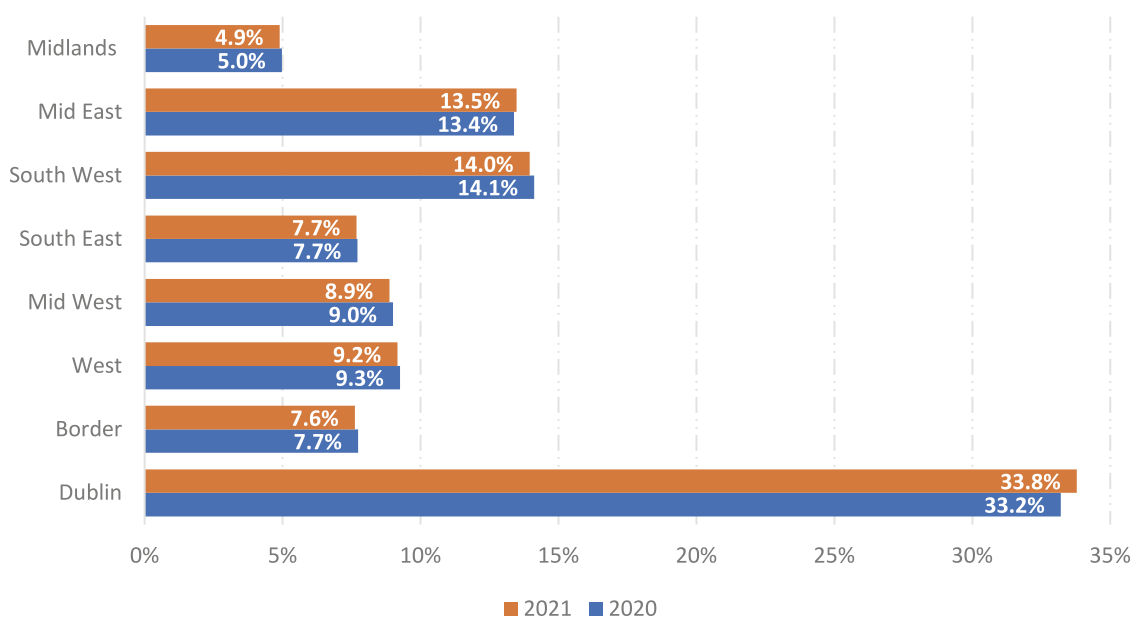
⁷⁴ Business Demography 2021 - Central Statistics Office

⁷⁵ Calculated from data in CSO, "Business Demography NACE Rev 2 by Employment Size, County, Year and Statistic" (BRA08).

⁷⁶ (Agriculture is included in the NI figures but only those that are VAT/PAYE registered so excluding the smallest farms).

While in Northern Ireland Belfast may hold the largest percentage of active businesses (as per Chart 7), it is only 2.2% ahead of its nearest rival, Mid Ulster. The landscape is somewhat different in the Republic of Ireland, as is shown in Chart 8. Dublin contained 33.8%, or 123,874, businesses in 2021 (up from 33.2% and 114,552 businesses in 2020), and the capital continues to outstrip all other NUTS 3 areas in the Republic of Ireland by some distance. In second place came the South-West, which was home to 14.0% of businesses in 2021. The Mid-East, including Co. Louth, accounts for the third largest share (13.5%), with the Border Regional Authority area having one of the lowest shares (7.6%). However, when examining the figures at county level, it is worth noting that Co. Donegal has a larger representation of active enterprises than all other Irish counties within the Northern Ireland-Ireland border region. Indeed, the county is home to almost 31% of all businesses in the Republic of Ireland Border area.

Chart 8: % of active enterprises by NUTS 3 area in the Republic of Ireland (2020 & 2021)

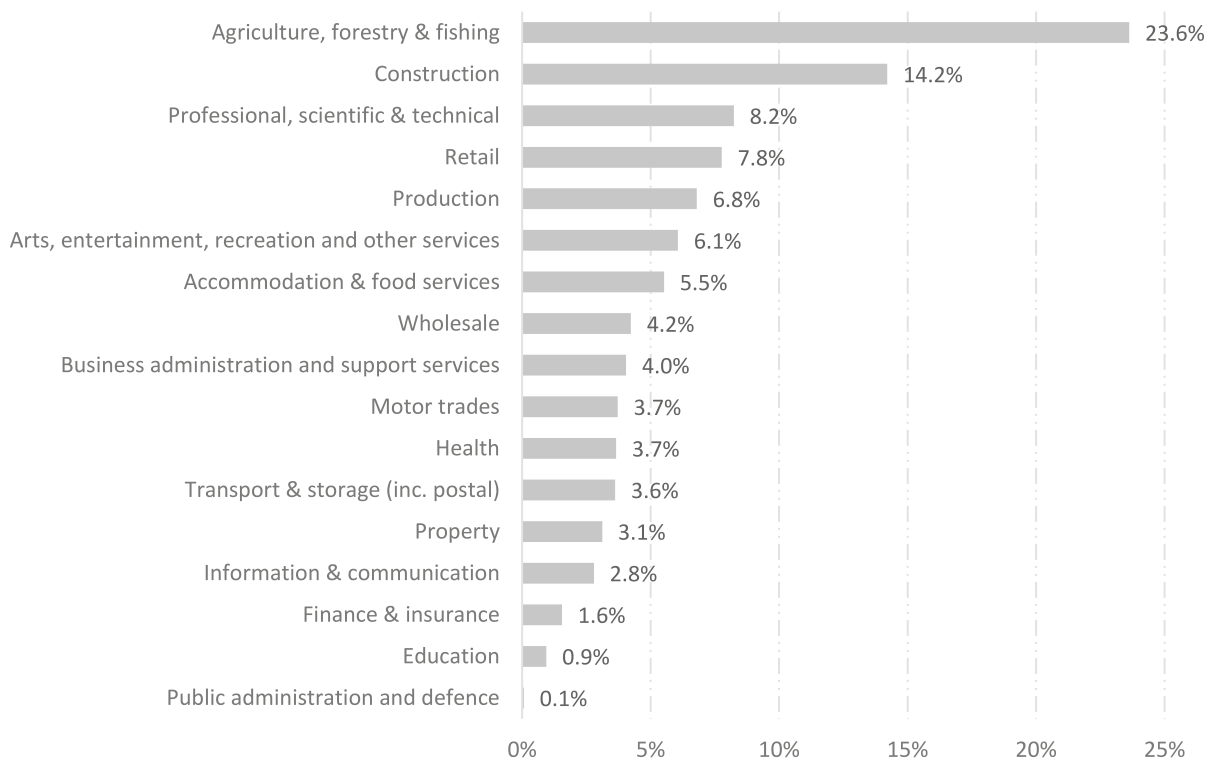


Bearing in mind important underlying differences in how the CSO and NISRA estimate the numbers of businesses in their respective jurisdictions, in 2021 (the latest year for which the relevant data is available for both jurisdictions) there were 79,752 businesses in the Northern Ireland-Ireland border region (42,875 in the five LGDs (NUTS 3 areas) on the Northern Ireland side of the border, and 36,877 in the Border Regional Authority area and Co. Louth on the other side). This meant a small increase in the number of businesses on the Northern Ireland side from 2020 (when there were 42,435 businesses), and a much bigger increase on the Republic of Ireland side (which had 35,105 businesses in 2020). Using this definition of 'businesses from the two sets of statistics therefore suggests that 17.9% of businesses on the island of Ireland in 2021 were based in the Northern Ireland-Ireland border region⁷⁷.

⁷⁷ RoI 365,766 + NI 80,045 = 445,811 and an estimated 79,752 located in the Northern Ireland – Ireland border region.

The nature of the businesses active in the Northern Ireland-Ireland border region needs to be understood within the overall business landscape in the two jurisdictions. Chart 9, therefore, sets out the share of a range of business by broad industry group in Northern Ireland as a percentage of all businesses registered in 2024 (80,045).⁷⁸

Chart 9: % of businesses in Northern Ireland by Broad Industry Group (2024)



Agriculture, forestry and fishing businesses continue to dominate the business landscape in Northern Ireland, representing 23.6% of all businesses, with construction maintaining a significant presence at 14.2%, followed by professional, scientific and technical enterprises (8.2%). Retail is the next largest share of businesses with 7.8%. However, while there may be many agriculture businesses in Northern Ireland, the Northern Ireland Skills Barometer 2021 notes that agriculture (along with retail and construction) is one of the sectors that has 'experienced the largest fall in their share of employment', and that 'the sectors which have increased their share of employment the most over the past 20 years are health and private services'.⁷⁹ The business landscape within the five LGDs (NUTS 3 areas) in Northern Ireland abutting the border shows some significant differences, with Fermanagh & Omagh being a notable example.

The agriculture, forestry and fishing sector represented 44.6% of all businesses in Fermanagh & Omagh in 2024 (slightly down from 2023, when it represented 45%). To put this in context, the proportion of businesses in Agriculture, forestry and fishing across all areas in Northern Ireland is 23.6%. Every other sector in Fermanagh & Omagh is below the Northern Ireland average;

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

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

production makes up 5.6% of business in Fermanagh & Omagh against an average of 6.8%, wholesale is 0.7 percentage points below the average, retail 1.8 percentage points below, accommodation and food services and information and communication are 2.1 percentage points below, and arts, entertainment and recreation 2.6 percentage points below. However, the sector that is most significantly underrepresented in Fermanagh & Omagh is professional, scientific and technical, where the area is 3.9 percentage points below the average figure for Northern Ireland. This difference is down by 0.2 points on 2023 where the sector in Fermanagh was 4.1 percentage points below the national average. This is a common feature across all five of the LGDs (NUTS 3 areas) where this sector has a lower presence, although Fermanagh & Omagh shows the greatest discrepancy.⁸⁰

Of the five border areas, Mid Ulster has the second highest representation of agriculture, forestry and fishing, at 34.7% of all businesses in the area in 2024. It also has a more significant presence of production (9.6% against an NI average of 6.8%), and construction (16.9% against an average of 14.2%) businesses than is the case for the Northern Ireland average, but a lower representation of businesses in retail (6% against 7.8%), accommodation and food services (2.1 percentage points lower than the average), information and communication (1.8% lower), arts, entertainment and recreation (2.7% lower), and professional, scientific and technical (2.7% lower).⁸¹

Agriculture, forestry and fishing is also an important business sector in Newry, Mourne & Down (25.7% of all businesses and 2.1% above the average), but the representation of the construction sector is proportionally more significant (18.8%) compared to the Northern Ireland average of 14.2%. The sector most underrepresented in Newry, Mourne & Down is professional, scientific and technical, which is 1.7 percentage points below the overall average for Northern Ireland, and Arts, entertainment, recreation and other services 1.3 percentage points below the Northern Ireland average. All other sectors are largely within 1 percentage point of the Northern Ireland average.⁸²

In Armagh, Banbridge & Craigavon, meanwhile, agriculture, forestry and fishing represented 26.7% of all businesses in the area in 2024, several other sectors were more strongly represented than was the case for the Northern Ireland average. These included production (7.4% compared to an average of 6.8%), motor trades (4.4% to an average of 3.7%), wholesale (4.6%), retail (8.1%), and transport and storage (5.4%). Of those sectors where representation was significantly below the overall figure for Northern Ireland, professional, scientific and technical (6.7%) and accommodation and food services (4.3%) saw the greatest differences (1.5 and 1.2 percentage points lower respectively).

The presence of Agriculture, forestry and fishing in Derry & Strabane was just below the Northern Ireland average in 2024 at 23.3%. Motor trades (3.9%), accommodation and food services (6.0%), arts, entertainment and recreation (6.6%) and health (4.3%) all featured more prominently in Derry & Strabane than the average across Northern Ireland. Construction (16.5%) had the greatest comparative presence in relation to the Northern Ireland average. Of the sectors less well represented in Derry & Strabane than is the case in Northern Ireland as a whole, the professional,

⁸⁰ NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2024", in Current Publication and IDBR Tables

⁸¹ Ibid.

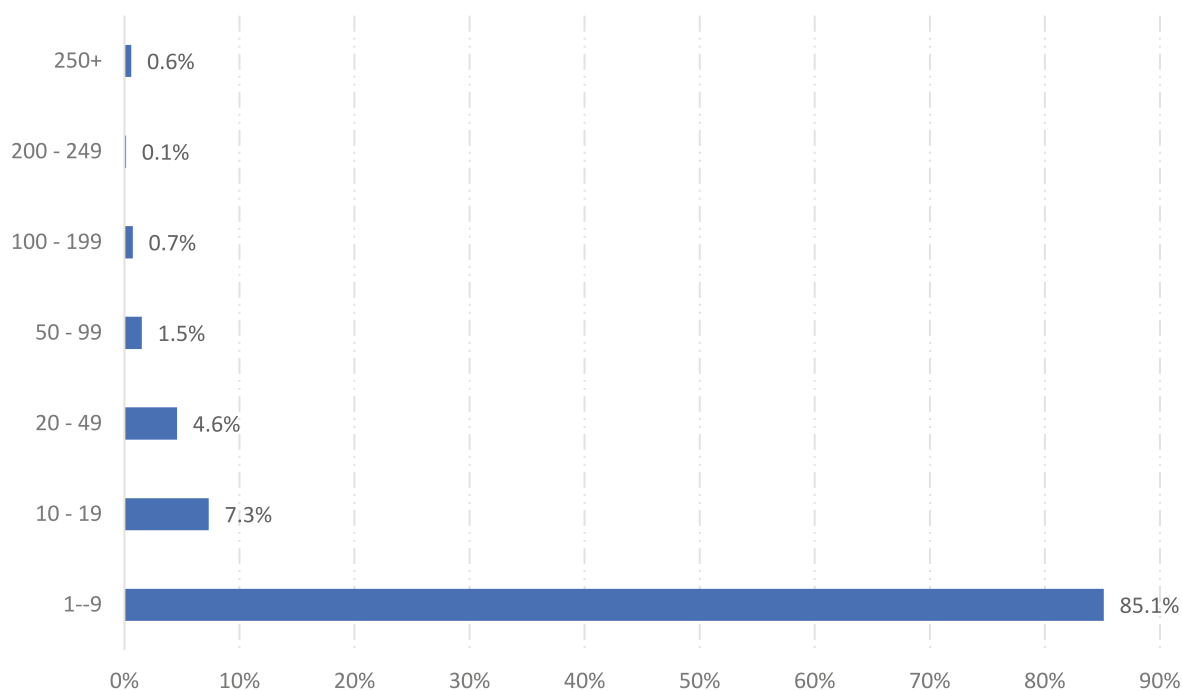
⁸² NISRA, "Table 3.2: Number of VAT and/or PAYE Registered Businesses Operating in Northern Ireland by District Council Area and Broad Industry Group, 2024", in Current Publication and IDBR Tables.

scientific and technical registered the greatest discrepancy, at 1.3 percentage points below the equivalent figure for Northern Ireland (6.9% compared to 8.2%).

In 2024, therefore, 71.4% of all businesses in the agriculture, forestry and fishing sector in Northern Ireland were located within the five LGDs (NUTS 3 areas) adjoining the border (no change from 2023), which also contained 60.5% of all construction businesses, 55.7% of all transport and storage businesses, 56.5% of all production businesses, and 48.1% of all retail businesses. In contrast, the same areas only contained 27.5% of all information and communication businesses, 36.1% of all finance and insurance businesses, 38.5% of all professional, scientific and technical businesses and 38.4% of all education businesses.

Smaller enterprises employing less than ten people predominate in Northern Ireland, with only 345 companies having more than 250 employees (up from 335 in 2023), which accounts for 0.6% of businesses with one or more employees, as can be seen in Chart 10.⁸³

Chart 10: % of VAT and/or PAYE registered businesses in Northern Ireland by employee size band (2024)



Businesses with more than one but less than ten employees have a higher presence in all five of the Northern Ireland Local Government Districts classified as border regions than the 85.1% Northern Ireland average (unchanged from 2023). Fermanagh & Omagh had the highest representation of the smallest businesses (88.8%).

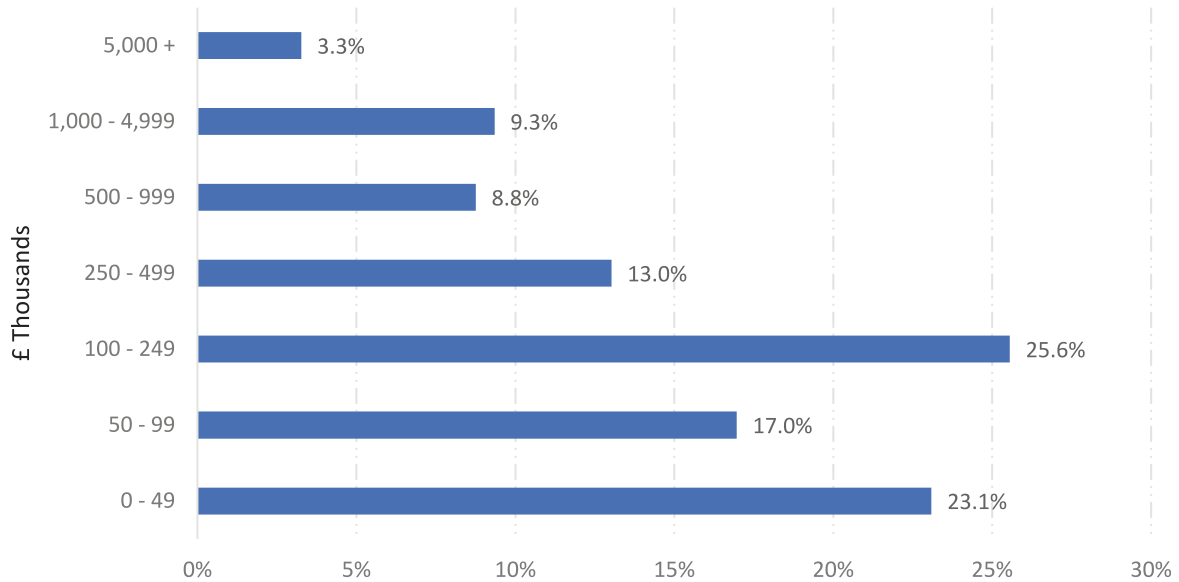
As can be seen in Chart 11,⁸⁴ most businesses in Northern Ireland had a turnover of less than £250,000 in 2024, with only 3.3% registering a turnover of £5million or more, which is slightly

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

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

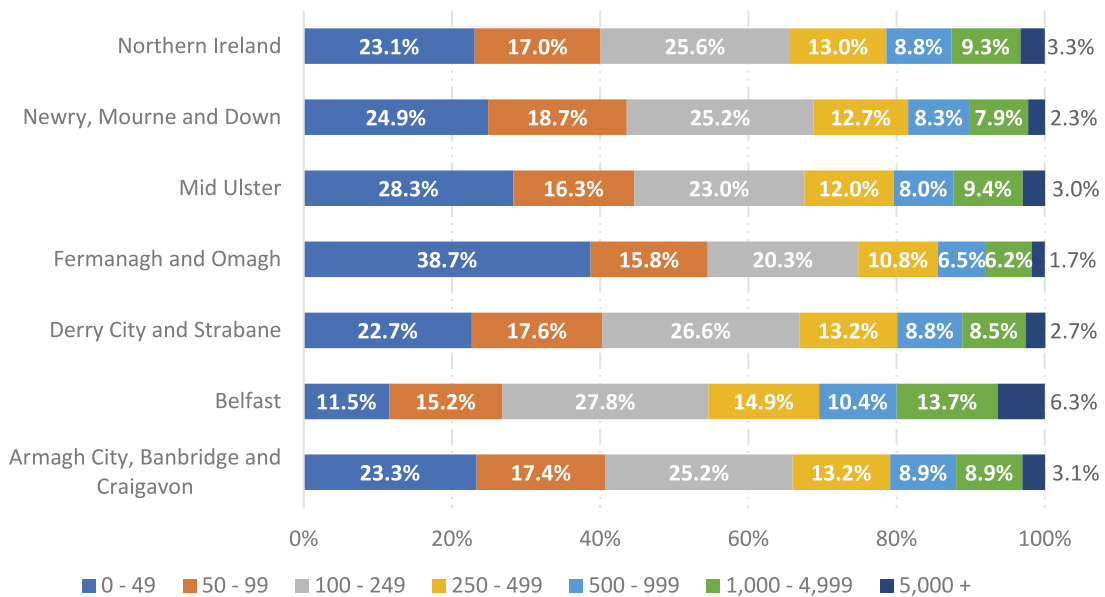
higher than the 3% recorded in 2023. As in many other aspects, however, Belfast diverges substantially from the pattern elsewhere, having a much lower percentage of businesses with a turnover of £49,000 or lower (11.5%, down from 14.1% in 2023), and a much higher percentage of those with a turnover of £5 million or more (6.3%, up from 5.8% in 2023).

Chart 11: % of registered businesses in Northern Ireland by turnover size band (2024)



Figures from the NISRA Inter Departmental Business Register (IDBR) show that the majority (78.6%) of Northern Ireland businesses have a turnover of less than £500,000 per year, with just under a quarter (23.1%) turning over less than £50,000. This pattern is seen somewhat more acutely in most of the LGDs (NUTS 3 areas) adjoining the border, with 38.7% of businesses in Fermanagh & Omagh having a turnover of less than £50,000 in 2024, and only 1.7% with a turnover of £5 million or more, as shown in Chart 12.

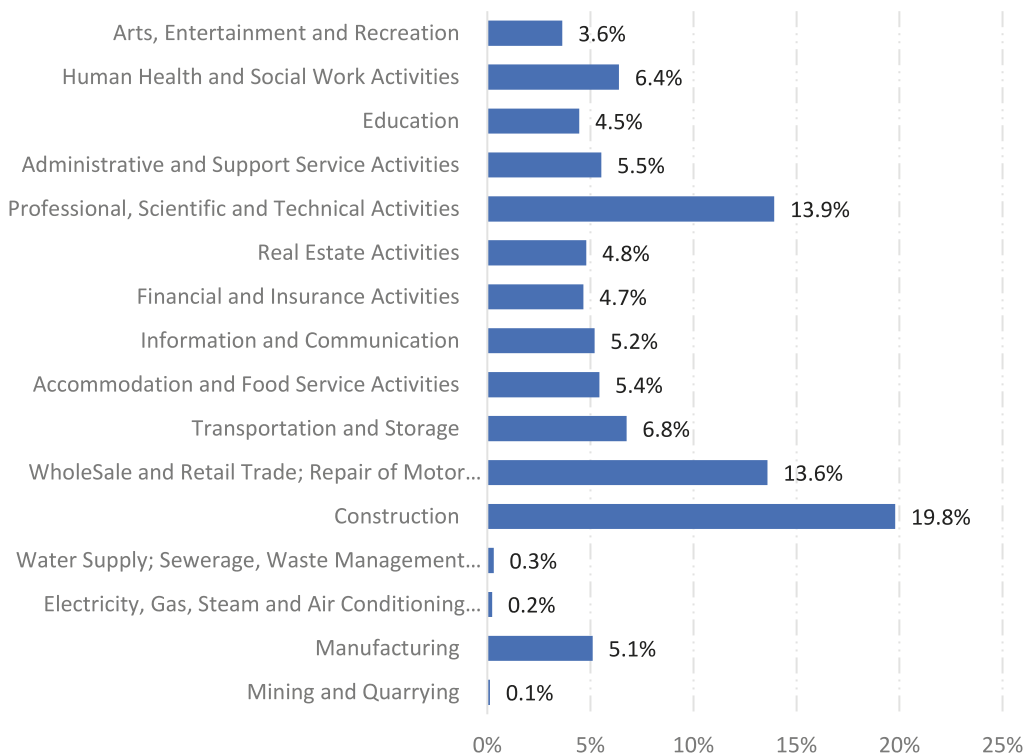
Chart 12: % of registered businesses by turnover size band (£ 000), % Share (2024)



In 2024 almost 27% of businesses in Derry & Strabane had a turnover in the £100,000 to £249,000 band. This was the only LGD in the Northern Ireland – Ireland border region where the percentage of businesses in this band was higher than the Northern Ireland average (26.6% compared to 25.6%). Derry & Strabane was also the only LGD in the border region to have a lower percentage of businesses in 0- £49,000 turnover band when compared with the Northern Ireland average. While, in Fermanagh & Omagh almost 39% of businesses fell into this turnover band. Only Armagh City, Banbridge and Craigavon were above the Northern Ireland average in the £500,000 to £999,000 cohort. All five LGDs in Northern Ireland which abut the Northern Ireland/Ireland border fell below the overall Northern Ireland level for £5,000,000+ turnover of 3.3%, with Armagh Banbridge & Craigavon the area closest to the overall average at 3.1%.

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 2021, with the total number of businesses (excluding the activities of holding companies) at 365,766⁸⁵

Chart 13: % of active enterprises in the Republic of Ireland by activity (2021)



We can see how construction (19.8%), wholesale and retail (13.6%), and professional, scientific and technical (13.9%) represent significant areas of business activity in the Republic of Ireland. This pattern is replicated across almost all the Irish counties within the Northern Ireland-Ireland border region, with construction having a proportionally greater presence in all the border counties except Sligo where it accounts for 19.4%. Cavan had the highest percentage of construction businesses

⁸⁵ Business Demography 2021 - Central Statistics Office

in 2021 at 26.4%, followed by Monaghan at 25.8% and Donegal at 25.7%. The wholesale and retail trade sector which is the third biggest in the Republic of Ireland was most strongly represented in Co. Monaghan (20.3% of all businesses in 2021) and had a weaker presence in Co. Sligo (14.4%) although all had a higher presence of wholesale and retail trade when compared with the national average (13.6%). Of the Irish counties on the Northern Ireland-Ireland border, the professional, scientific and technical sector was the third most represented sector in all except Donegal and Monaghan. In Co. Donegal businesses in the accommodation and food service sector were more strongly represented than those in the professional, scientific and technical sector, with accommodation and food service activities accounting for 9% of active enterprises in Donegal against 8.2% for professional, scientific and technical businesses. In Monaghan, Manufacturing businesses were more common (9.5%) than professional, scientific and technical (8.4%).

As noted earlier, agriculture is not included in the CSO data we have been referring to. However, it is noteworthy that in 2020 20.9% (approximately 28,191) of all Ireland's farm holdings were in the Ireland Border Region⁸⁶.

As can be seen in Table 14,⁸⁷ the predominance of businesses employing less than 10 people in the Republic of Ireland in 2021 (92.6%) appears to be even stronger than in Northern Ireland, where in 2024 they accounted for 85.1% of all businesses. This is also the case for the border region counties.

Table 14: % of Republic of Ireland active enterprises by employment size (2021)

	Under 10 employees	10 to 19	20 to 49	50 to 249	250+
Co. Cavan	92.5%	4.0%	2.3%	1.0%	0.1%
Co. Donegal	92.3%	4.4%	2.4%	0.8%	0.1%
Co. Louth	91.9%	4.6%	2.3%	1.1%	0.2%
Co. Monaghan	91.2%	4.8%	2.6%	1.3%	0.1%
Co. Sligo	92.7%	3.8%	2.4%	0.9%	0.2%
Co. Leitrim	94.6%	3.4%	1.5%	0.3%	0.1%
Republic of Ireland	92.6%	3.9%	2.3%	1.1%	0.2%

The Irish border counties' business demography in terms of the size of its businesses is broadly in line with that of the Republic of Ireland on average, with most businesses in Ireland's border counties employing less than ten people. However, Leitrim (94.6%) and Sligo (92.7%) have marginally higher levels of businesses with under 10 employees than the overall national level (92.6%).

Returning to Northern Ireland, Chart 14 details the percentage of employee jobs in Northern Ireland by broad sector according to NISRA's Quarterly Employment Survey at June 2024.⁸⁸ As the Chart shows, of the 826,130 total employee jobs in June 2024, the majority were in services, totaling 673,140 or 81.5% (an increase of 0.9% (6,310 jobs) in the number of total employee jobs

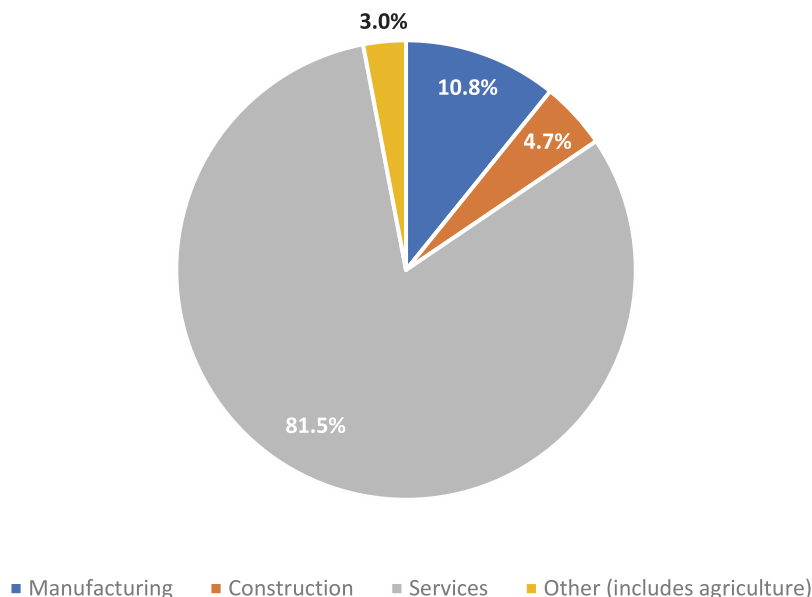
⁸⁶ CSO Census of Agriculture 2020

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

⁸⁸ NISRA, Quarterly Employment Survey Supplementary Tables June 2024. Please note, these are provisional estimates and may be revised in the next QES publication.

from Q2 of 2023). Manufacturing occupied the second largest share with 10.8% (89,280) at June 2024, which represented a fall of 0.4% (320 jobs) in total manufacturing employee jobs from Q2 2023. The construction sector accounted for 4.5% (38,950) of total employee jobs in Q2 2024, which was an increase of 10.8% on the same period in 2023 while the “other” category (which includes agriculture) accounted for 3.0% (24,760)⁸⁹.

Chart 14: % of employee jobs in Northern Ireland by broad sector (June 2024)



However, there are some significant differences in terms of the sectoral distribution of employment in the five of Northern Ireland’s LGDs within the Northern Ireland-Ireland border region, particularly in relation to the relative importance of the services sector.⁹⁰

Table 15: % of employee jobs by broad sector in LGDs (NUTS 3 areas) in Northern Ireland (2022)

	Construction	Manufacturing	Other	Services	Agriculture
Armagh City, Banbridge and Craigavon	5.7%	16.2%	1.5%	74.1%	2.5%
Derry City and Strabane	4.5%	10.3%	1.3%	82.5%	1.4%
Fermanagh and Omagh	6.9%	13.8%	2.4%	73.4%	3.5%
Mid Ulster	9.1%	28.0%	2.0%	58.4%	2.5%
Newry, Mourne and Down	7.0%	14.1%	2.3%	74.1%	2.4%
Northern Ireland	5.3%	10.8%	1.6%	80.9%	1.4%

Apart from Derry & Strabane (82.5%), Table 15 above shows how in 2022 the service sector employed a smaller percentage of people in border areas than was the case for the Northern Ireland average (80.9%), most notably the case for Mid Ulster. Here, whereas the services sector only accounted for 58.4% of employee jobs, manufacturing represented 28.0%, more than double

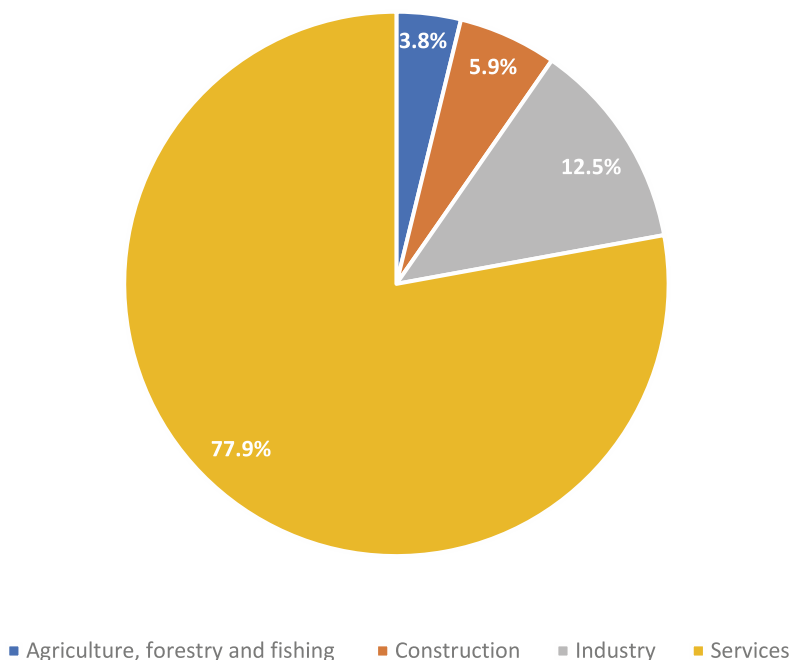
⁸⁹ Quarterly Employment Survey Statistical Bulletin - June 2024 (nisra.gov.uk)

⁹⁰ Based on NISRA’s BRES Publication and Tables 2022, specifically Table 3.2: Number of Employee Jobs by District Council Area and Headline Industry, September 2022, and Annex 1: Number of employee jobs in agriculture by District Council Area, June 2022.

the figure for Northern Ireland as a whole (10.8%). This sector was also more prominent in terms of the share of employee jobs in the other LGDs (NUTS 3 areas) within the border region, except for Derry & Strabane, where it accounted for 10.3% (a slight increase from the 9.9% recorded in 2021). Construction accounted for more employee jobs in four of the five LGDs (NUTS 3 areas) than the Northern Ireland average. In Derry and Strabane, construction accounted for 4.5% compared to the Northern Ireland average of 5.3%, while construction in Mid Ulster accounted for 9.1% of employee jobs. In overall terms, agriculture was not a significant sector for employee jobs, with Fermanagh & Omagh having the highest share in this sector, at 3.5%.⁹¹

CSO's Labour Force Survey for the second quarter of 2024 includes the distribution of those aged 15 years and over in employment by business sectors, including agriculture, as set out in Chart 15.⁹²

Chart 15: % of persons aged 15 years and over in employment by broad sector in the Republic of Ireland (Q2 2024)



We can see from the above chart that, as was the case in Northern Ireland, the services sector accounts for the largest share of those employed (77.9%) in the Republic of Ireland, although its dominance is not as marked as in Northern Ireland. A slightly higher percentage of people are engaged in the construction, industry, and agriculture sectors than in Northern Ireland.⁹³

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

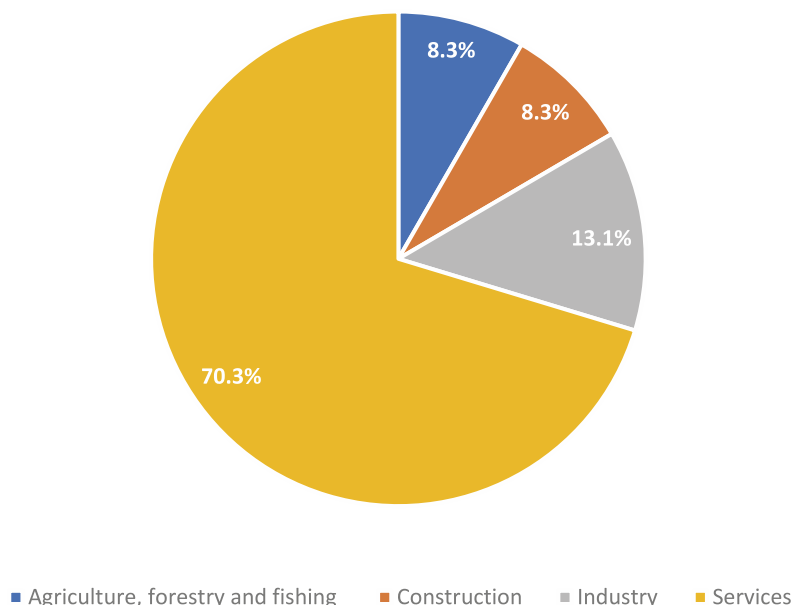
⁹¹ Based on NISRA's BRES Publication and Tables 2022 specifically Table 3.2: Number of Employee Jobs by District Council Area and Headline Industry, September 2022. Note that agriculture has been included in this table using data from the appendix in the BRES tables.

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

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

⁹⁴ CSO, QLF07 - Persons aged 15-89 years in Employment (cso.ie).

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



Agriculture plays a more important role in the Border Regional Authority area economy, more than double the share at the national level (8.3% vs. 3.8% nationally). Construction plays a larger role, making up 13.1% of employees (5.8% nationally) with services playing a smaller but still the most significant role at 70.3% of jobs.

The Mid-East region, which includes Co. Louth, did not diverge substantially from the overall national pattern of employment distribution, with the services sector and construction sector employing marginally more than the national average with 78.1% and 6.7% respectively. Other industries were slightly less represented than the national average.

For several 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 Jobs & Benefits Offices of the Department for Communities (DfC) in the 2023/24 financial year and see how many of these are available in the five LGDs in the Northern Ireland-Ireland border region.⁹⁵

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

Table 16: Employment vacancies notified to DfC (2023/2024)⁹⁶

	Number of vacancies	Number per 1,000 of resident population	% change from previous year
Armagh City, Banbridge and Craigavon	4,874	22.1	-23.4%
Mid Ulster	2,820	18.7	-26.0%
Derry City and Strabane	4,048	26.8	-16.6%
Newry, Mourne and Down	3,231	17.7	-20.5%
Fermanagh and Omagh	2,416	20.7	-9.2%
Northern Ireland	49,337	25.8	-22.1%

The five local government districts which abut the Northern Ireland-Ireland border accounted for 34.4% of the total vacancies in Northern Ireland in 2023/24 (while they account for 38.8% of employee jobs (BRES, 2022)). As we see in Table 6, there has been a substantial decrease in the number of vacancies across all border LGDs (and indeed all 11 LGDs experienced significant decreases in advertised vacancies on 2022/23). Mid Ulster had the biggest drop in the number of vacancies falling by almost 1,000 or 26% between 2022/23 and 2023/24. Fermanagh & Omagh saw the smallest drop with 244 less than the previous year or 9.2% less. As reported by DfC, the trend in vacancies is usually reflective of labour market conditions. In Northern Ireland overall, employment vacancies notified to the Department peaked in 2021/22 (91,087) following the impact of the pandemic. Since then, vacancies have continued to fall and by 2023/24 total vacancies were at 49,337, almost 46% less than 2021/22.

Although there is no readily available data at the LGD level, the sectors of economic activity in Northern Ireland with the highest number of notified vacancies to the DfC in 2023/24 by Standard Occupation Code (SOC) were: 'Caring, Leisure and Other Service Occupations' with 16,096 (33%), 'Elementary Occupations' with 7,969 or 16% of all vacancies and 'Administrative and Secretarial Occupations' with 5,208 notified vacancies accounting for 11% of the total. The least frequently notified occupation types for vacancies were in 'Managers, Directors and Senior Officials' with 968 or 2% of all vacancies. 'Administrative and Secretarial Occupations' are the only occupational group to see an increase in the number of notified vacancies in the last year increasing from 4,035 in 2022/23 to 5,208 in 2023/24. 'Process, Plant and Machine Operatives' and 'Sales and Customer Service Occupations' saw the biggest drop in the number of notified vacancies falling by 3,007 and 2,890 respectively between 2022/23 and 2024/25⁹⁷.

The CSO's estimates for the second quarter of 2024 sets the number of job vacancies in the Republic of Ireland at 26,400 (which, represents a fall of 7% from Q2 of 2023, when there were 28,400 vacancies). Prior to the Covid-19 pandemic, the number of job vacancies had peaked in Q2 of 2018 at 22,000. However, by Q2 2022 the number of job vacancies had reached a high of just under 35,000. The sectoral distribution of these vacancies in Q2 2023 and Q2 2024 is shown in Table 17.⁹⁸

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

⁹⁷ Department for Communities. Vacancy Statistics 2022/2023 (nisra.gov.uk) & Employment Vacancies Notified to the Department for Communities

⁹⁸ CSO, Earnings and Labour Costs Quarterly Q3 2022 (prelim) "Job vacancies by economic sector and other characteristics and quarter".

Table 17: Number of job vacancies in the Republic of Ireland by economic sector (Q2 2024)

	Q2 2023	Q2 2024	% Change
Industry	1,900	2,900	52.6%
Construction	800	1,900	137.5%
Wholesale and retail trade	2,600	2,500	-3.8%
Transportation and storage	500	1,800	260.0%
Accommodation and food service	1,200	1,100	-8.3%
Information and communication	1,200	1,500	25.0%
Financial, insurance and real estate	2,400	1,500	-37.5%
Professional, scientific and technical	3,200	3,300	3.1%
Administrative and support service	900	800	-11.1%
Public administration and defence	6,700	2,900	-56.7%
Education	2,700	3,100	14.8%
Human health and social work	3,600	2,800	-22.2%
Arts, entertainment and recreation	700	400	-42.9%
Total	28,400	26,400	-7.0%

Professional, Scientific and technical activities had the highest number of vacancies in the Q2 2024 (3,300), up 3.1% on Q2 2023), followed by Education (3,100) and Public administration and defence (2,900) and Industry (2,900). Transport and storage once again experienced the biggest increase in advertised vacancies, up 260% from 500 to 1,800. Public administration and defence experienced the biggest decline in advertised vacancies, falling by 656.7% from 6,700 in Q2 2023 to 2,900 in Q2 2024.

Regional and local level figures are not available through the CSO vacancy data. However, we can gain some insights through an online Irish recruitment agency's report on vacancies for Quarter 2 of 2024. It notes how, "the jobs market is on a positive and steady trajectory following a period of significant volatility".⁹⁹The report presents its data at the county level, showing year-on-year and quarterly changes in vacancies across all counties.¹⁰⁰ The report states, 'As regards vacancies by location, the second quarter dynamic in vacancies at the national level has been driven by a mix of experiences at the county level. A strong fall is evident in Carlow (-19%). This fall contrasts with strong quarterly vacancy increases in Roscommon (+46%), Longford (+36%) and Monaghan (+33%). The year-on-year figures remain negative for all but four counties. Table 18 focuses specifically on the data relating to the six border counties. Donegal again experienced the highest year-on-year change at a decrease of 22%. Cavan and Louth were the only two of the border counties to see a year-on-year increase in the number of job vacancies at 11% and 6% respectively.

⁹⁹ IrishJobs-Jobs-Index-Q2-2024.pdf

¹⁰⁰ Ibid, p.15.

Table 18: Year-on-year and quarterly % change in number of job vacancies (Q2 2024)

Border Counties	Year-on-year change	Quarterly change
Cavan	11%	21%
Donegal	-22%	7%
Leitrim	-12%	-1%
Louth	6%	9%
Monaghan	-16%	-2%
Sligo	-8%	-6%

As previously reported, the Covid-19 pandemic and the various restrictions put in place to address it, meant that Irish employers and employees had to adapt to and integrate the practice of working remotely. While working from home job vacancies had previously been increasing, according to the Jobs Index Report for Quarter 2 2024, working from home job vacancies fell by 23% in the second quarter, substantially faster than that of overall vacancies. The Q2 2022 report noted that “working from home vacancies grew at a faster rate than overall vacancies, which supported the idea that it was set to become a permanent feature of the post-pandemic labour market”. However, Q3 2022 was the first period to experience a fall in the number of working from home vacancies, the report noting that ‘the trend since 2023 Q3 suggests that we can expect a further reduction in the level of fully remote homeworking in Ireland in 2024’. Employers in Dublin (82%), Limerick (5%) and Cork (4%) are responsible for most working-from-home vacancies, suggesting that homeworking in Ireland is strongly driven by the pressures of commuting into large metropolitan centres.

Irishjobs.ie previously noted that ‘employers believe the office still has an important role to play in the workplace ecosystem’.¹⁰¹ A report published by the UU Economic Policy Centre in February 2022 notes that “Pre-COVID, home working (complete or regular) applied to less than 10% of the NI labour force. This increased to 41% in April 2020 and fell slowly to 30% in May 2021, but even with the lifting of restrictions homeworking remains at 17%”.¹⁰² This could be indicative of a similar belief amongst employers in Northern Ireland that, like their counterparts in the Republic of Ireland, there is still a need for “physically present” roles in the workforce. The 2022 Census in Ireland asked a question on working from home¹⁰³ and the results show that approximately 18% of persons aged 15 and over in the Republic of Ireland work from home at least one day per week. Of the border counties, all had a lower percentage of the population working from home at least one day per week with Donegal and Monaghan the lowest at 11.5% and 11.6% respectively. For those persons who worked from home, the majority worked 5 days from home except in Monaghan where the majority worked one day per week from home.

¹⁰¹ Ibid.

¹⁰² Future of Remote Working in Northern Ireland: Full Report (ulster.ac.uk), p.36.

¹⁰³ The Working from Home question was asked for the first time on the Census 2022 form.

Table 19: Population aged 15+ working from home by border region county (2022)

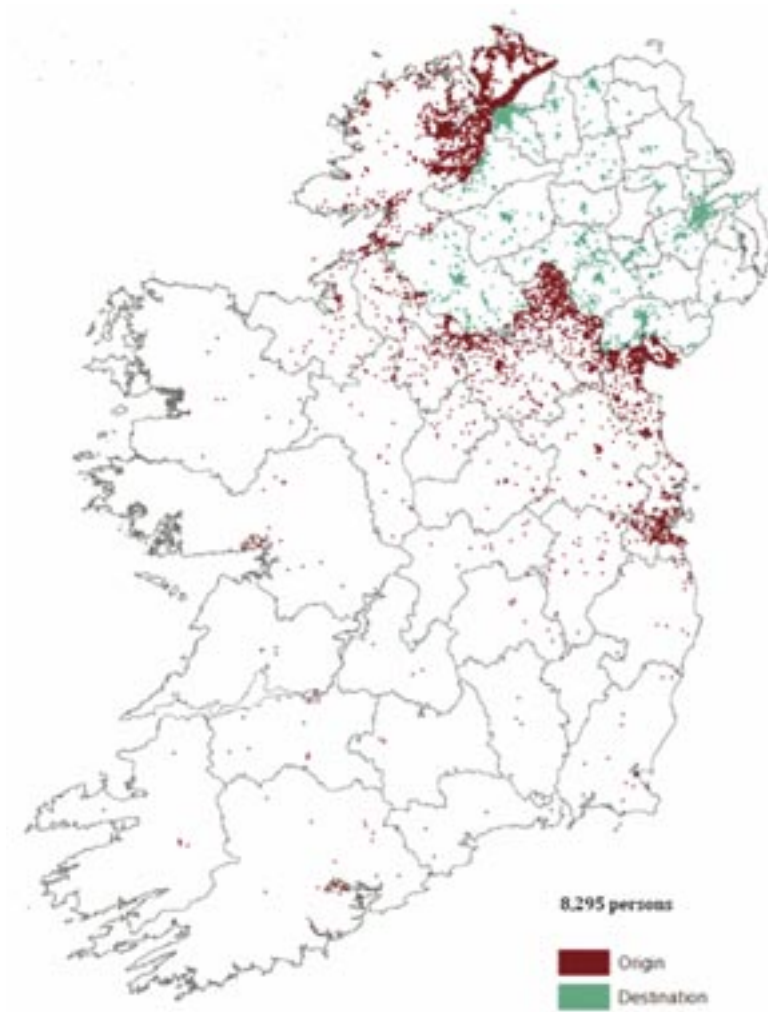
	Ireland	Cavan	Donegal	Leitrim	Louth	Monaghan	Sligo
Population aged 15+	4,136,852	63,952	132,992	28,038	110,609	50,958	56,825
Total persons working from home	747,961	7,898	15,350	4,079	15,787	5,900	8,216
% working from home at least one day per week	18.1%	12.3%	11.5%	14.5%	14.3%	11.6%	14.5%
1 day	15.0%	18.3%	19.0%	18.4%	16.5%	19.2%	18.9%
2 days	16.6%	16.2%	14.2%	16.2%	15.8%	15.5%	16.6%
3 days	16.0%	12.2%	11.1%	13.1%	14.4%	10.9%	12.2%
4 days	10.3%	7.5%	6.9%	7.8%	11.4%	6.9%	7.4%
5 days	27.2%	21.0%	28.1%	25.3%	27.9%	18.4%	26.3%
6 days	1.0%	1.9%	1.6%	1.4%	1.0%	2.1%	1.2%
7 days	4.4%	10.3%	7.3%	7.3%	2.7%	12.3%	6.2%
Number of days not stated	9.4%	12.6%	11.8%	10.4%	10.3%	14.7%	11.2%

In Northern Ireland in Census 2021, respondents were asked about their place of work with 'work mainly at or from home' as an option. In Northern Ireland overall, 22.6% of those who responded to this question said they work mainly from home. In the five border region LGDs, the percentage working at home were all well below the national average with Newry, Mourne and Down having the highest percentage at 17.6% and Mid Ulster the lowest at 15.9%.

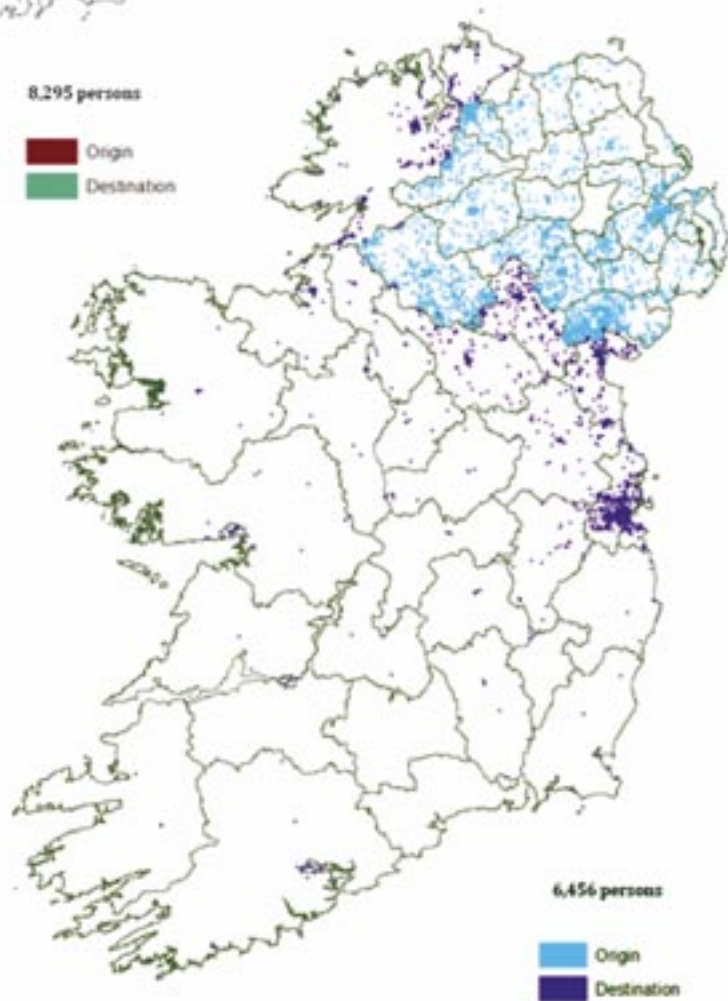
Cross-border mobility in the Northern Ireland-Ireland border region

Although, as noted earlier, residents cross the border between the two jurisdictions on the island of Ireland for a variety of purposes, and crossings are 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, 'Census 2011, Ireland and Northern Ireland', the CSO and NISRA noted that the "majority of those [from Ireland] who commuted to Northern Ireland were resident in the border areas of Donegal, Cavan, Monaghan and Louth", and while the residence of those commuting in the opposite direction "was more widely spread across Northern Ireland", "much of the activity is in border areas". However, bearing in mind that cross-border commuting for the purpose of education is included in this data, it is worth noting how the destinations of these cross-border commuters is not restricted to the Northern Ireland-Ireland border region, as the same report points out. In respect of commuters from Ireland, "Their destinations [...] were mainly concentrated in the Belfast and Derry LGDs, with further clusters in Newry, Armagh, Craigavon, Dungannon, Enniskillen, Omagh, Limavady, Strabane and Coleraine". The destination of those commuting from Northern Ireland "is concentrated in Dublin, with further clusters in the towns of Letterkenny, Drogheda, Dundalk, Cavan and Monaghan".¹⁰⁴ It is worthwhile reproducing here two maps included in the CSO and NISRA report to better illustrate the geography of these flows of cross-border commuters, bearing in mind, of course, that the strength of these flows will have been affected by the Coronavirus pandemic and the increased rates of working from home.

¹⁰⁴ CSO and NISRA, "Census 2011: Ireland and Northern Ireland" (June 2014), p.60.



Map 5: Origin and destination of cross-border commuters from Ireland to work or study in Northern Ireland.¹⁰⁵



Map 6: Origin and destination of cross-border commuters from Northern Ireland to work or study in Ireland.¹⁰⁶

¹⁰⁵ CSO and NISRA, "Census 2011: Ireland and Northern Ireland", p.61.

¹⁰⁶ CSO and NISRA "Census 2011: Ireland and Northern Ireland", p.62.

A more recent report (2018) by Northern Ireland’s Department for the Economy suggested that “commuter patterns indicate ‘hotspots’ between Derry-Londonderry and Donegal and between Newry and Dundalk (located on the Dublin-Belfast axis)”, and that “Other noteworthy interactions include Cavan and Enniskillen, Lifford and Strabane and Monaghan and Armagh”.¹⁰⁷ It also reflected on engagement it undertook with stakeholders in the North West of the island of Ireland, which “highlighted the importance of cross border workers”, and how “over the past 10-15 years there has been a large number of people from Derry-Londonderry who have moved to live in the towns and villages in Donegal in close proximity to the border while continuing to work in [Northern Ireland]” (p.19).

According to the data from the latest Censuses for both jurisdictions, just over 15,000 people based in the Northern Ireland-Ireland Border region cross the border to work. The Northern Ireland-Ireland Border region therefore accounts for 83% or more than 8 in 10 cross-border workers across the island of Ireland.

Table 20: Cross-Border Workers in the Northern Ireland-Ireland Border region

	Ireland	Northern Ireland	Total	% of Cross-Border Workers
Working cross-border	7,777	10,540	18,317	
Northern Ireland – Ireland border region	6,229	9,004	15,233	83%

Source: NISRA Census 2021, CSO Census 2022

Analysis of the Irish 2022 Census shows that there were approximately 7,777 people who crossed the border into Northern Ireland for work, an increase of more than 700 or 10.5% from the 7,037 reported in the 2016 Census. As stated in previous reports, it is important to note that this will likely 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 in their home jurisdiction but may have to cross the border regularly for work reasons. Nevertheless, using the data from the 2022 Census, Table 21 shows the counties of origin and destination of people travelling from Ireland to Northern Ireland to work.

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

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 (2022)

	Working in Northern Ireland	Antrim	Armagh	Down	Derry	Fermanagh	Tyrone
Ireland	7,777	1,134	1,052	867	2,979	762	983
% of Cross Border workers	100%	15%	14%	11%	38%	10%	13%
Ireland Border Region	6,229	538	813	482	2,861	658	833
Rest of Ireland	1,548	596	239	385	118	104	150
<i>Border region including:</i>							
Donegal	4,054	303	81	90	2,821	109	650
Monaghan	813	75	383	84	21	109	141
Louth	720	101	310	275	8	6	20
Cavan	436	31	39	25	<6	316	<25
Leitrim	139	9	<6	8	<6	105	11
Sligo	67	19	<6	<10	11	13	11

Source: CSO Census 2022

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. According to the 2022 Census 4,054 people from Donegal crossed the border to work in Northern Ireland. Overall, Derry was the most common place to travel cross-border for work with 38% of all cross-border workers working here. Derry being the most significant destination, representing 2,821 of these workers. Residents in Donegal account for almost 95% of the total cross-border workers in Derry. Monaghan had a total of 813 cross-border workers with the majority (48%) travelling to Armagh for work. Only 67 residents from Sligo travelled cross-border for work.

Data from the Northern Ireland Census 2021 shows that there were 10,541 residents in Northern Ireland who work in the Republic of Ireland. As presented in Table 22, the five Northern Ireland LGDs abutting the border occupied the top five positions in terms of numbers of their residents working in the Republic of Ireland, with Belfast coming sixth. Newry, Mourne & Down had the highest number (3,159) which accounts for 30% of the total cross border workers followed by Derry City & Strabane (1,966 or 18.7%) and Fermanagh & Omagh (1,883 or 17.9%). In 2011, Newry, Mourne and Down also had the highest number of cross border workers although the number has increased by almost 81% in the ten years since the last Census.

Table 22: Northern Ireland residents (aged 16-74, excluding students) working in the Republic of Ireland (2021)

	Work outside Northern Ireland: Republic of Ireland	% of Cross-Border Workers
Antrim and Newtownabbey	142	1.3%
Armagh City, Banbridge and Craigavon	1,323	12.6%
Belfast	574	5.4%
Causeway Coast and Glens	255	2.4%
Derry City and Strabane	1,966	18.7%
Fermanagh and Omagh	1,883	17.9%
Lisburn and Castlereagh	275	2.6%
Mid and East Antrim	122	1.2%
Mid Ulster	673	6.4%
Newry, Mourne and Down	3,159	30.0%
Ards and North Down	169	1.6%
Northern Ireland	10,541	100%

The Northern Ireland Census also asked respondents about their mode of travel to work and the results for those Northern Ireland to Ireland cross-border workers are presented in the table below. As we might expect, driving a car or van is the most common mode of travel for cross border workers with an average 86% of workers travelling this way. This is above the average for all workers in Northern Ireland where 77% of workers overall travel to work by driving a car or van. In Fermanagh & Omagh, 92% of cross border workers drive to work, this is higher than any other LGD. Unsurprisingly, cross border workers from Belfast were least reliant on cars. Perhaps surprisingly, 7% of cross border workers from Lisburn and Castlereagh LGD travelled to work on foot.

Table 23: Mode of Travel to work for Northern Ireland to Ireland cross border workers (2021)

	Driving a car or van	Passenger in a car or van	Bus, minibus or coach (public or private)	On foot	Other method
Antrim and Newtownabbey	76%	3%	7%	3%	11%
Armagh City, Banbridge and Craigavon	86%	6%	1%	1%	6%
Belfast	70%	4%	8%	7%	11%
Causeway Coast and Glens	89%	4%	2%	2%	4%
Derry City and Strabane	89%	6%	1%	1%	2%
Fermanagh and Omagh	92%	4%	1%	1%	2%
Lisburn and Castlereagh	80%	3%	2%	7%	8%
Mid and East Antrim	79%	9%	2%	5%	5%
Mid Ulster	86%	6%	2%	2%	4%
Newry, Mourne and Down	85%	6%	2%	1%	6%
Ards and North Down	79%	2%	5%	3%	11%
Cross-Border Workers	86%	5%	2%	2%	5%
All NI Workers	77%	6%	4%	9%	5%

While there is currently no updated information available on cross border workers by industry or occupation, the 2014 joint report by the CSO and NISRA analysing the data from the 2011 censuses in both jurisdictions noted that in terms of employment, “the most important industry for cross-border commuters was wholesale and retail, accounting for 16 per cent of persons travelling to Ireland from Northern Ireland and 14 per cent commuting in the opposite direction” (p.64). It also highlighted the importance of education and health services, which together accounted for 28 per cent of those commuting from Ireland to Northern Ireland, and 22 per cent of those commuting in the opposite direction. However, the report does not comment on the fact that approximately 14% of those commuting from Ireland to Northern Ireland and 12.5% of those commuting in the opposite direction did so to work in the manufacturing (including mining) sector.

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

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

However, it also noted how,

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

The Results

Analysis of the most recent data confirms several long-standing patterns in cross-border labour mobility and highlights emerging demographic, educational, and economic trends in the Northern Ireland–Ireland border region.

Cross-Border Labour Mobility

- The Derry City & Strabane–Donegal route remains the most intensive corridor for cross-border commuting, with a stronger flow from Donegal into Derry City & Strabane.
- All five Northern Ireland border LGDs (Armagh City, Banbridge & Craigavon; Newry, Mourne & Down; Fermanagh & Omagh; Derry City & Strabane; and Mid Ulster) are significant destinations for workers from the Republic of Ireland.
- On the Republic’s side, Donegal, Monaghan, Louth, and Cavan are key origins for commuting into Northern Ireland, while Sligo and Leitrim are less prominent in south–north flows.
- Republic of Ireland → Northern Ireland: The Irish Census 2022 recorded 7,777 residents commuting to Northern Ireland for work, an increase of over 700 (10.5%) since 2016. This represents around 42% of all cross-border workers

on the island. The largest single flow is from Donegal to Derry City & Strabane (4,054 workers, almost 95% into Derry), followed by notable flows from Monaghan, Louth, and Cavan into Newry, Mourne & Down, Armagh City, Banbridge & Craigavon, and Fermanagh & Omagh respectively.

- Northern Ireland → Republic of Ireland: The NI Census 2021 found 10,541 residents working in the Republic of Ireland, making up around 58% of all cross-border workers. These flows are concentrated in Newry, Mourne & Down (3,159 workers), Derry City & Strabane (1,966), and Fermanagh & Omagh (1,883), which together account for roughly two-thirds of all NI–ROI cross-border commuting.
- Across both directions, 83% of all cross-border workers live in the Northern Ireland–Ireland border region – underscoring the region’s central role in island-wide cross-border labour mobility.
- Mobility patterns also reflect broader transport trends, with car or van travel dominating cross-border commuting (86% of cross-border workers in Northern Ireland use this mode).

Demographic Profile

- The border region houses almost one-fifth of the island’s population and continues to grow steadily, with a younger-than-average population compared to each jurisdiction.
- At the same time, the proportion aged 65+ is rising across all border counties and LGDs, with some areas (e.g., Fermanagh & Omagh) exceeding the national averages.
- Northern Ireland’s older population is projected to outnumber its 0–15 age group by 2028, signalling future labour supply pressures.

Education and Skills

- Educational attainment in the border region lags national averages in both jurisdictions.
- On the Northern Ireland side, all LGDs (except Armagh City, Banbridge & Craigavon and Derry City & Strabane) have higher-than-average proportions of people with no qualifications, and lower proportions with degree-level qualifications or above.
- In the Republic’s Border region, fewer residents hold third-level qualifications and more have only primary education compared to national figures, with Donegal recording the weakest profile.
- This skills gap continues to drive cross-border recruitment, as employers seek qualified workers from the neighbouring jurisdiction.

Labour Market Participation and Unemployment

- Northern Ireland’s ILO unemployment rate remains very low (around 2%), partly due to higher economic inactivity rates, while the Republic’s stands at around 4–5%.
- In the Republic’s Border region, the participation rate is the lowest of all NUTS 3 regions (62.3%), well below the national average of 66%.
- At county level, all border counties except Monaghan have higher unemployment rates than the national figure, with Louth at 10.9% in 2022.

Economic Output and Income

- GVA per head in most Northern Ireland border LGDs is below the NI average (£26,119 in 2022), with Mid Ulster the exception. Newry, Mourne & Down ranks lowest within the border region.
- In the Republic, the Border region has the lowest GVA per head (€24,228 in 2021) and the lowest disposable income (€20,445), with Donegal notably at the bottom of all counties.
- All NI border LGDs have lower disposable incomes per head than the NI average.

Business Landscape

- Agriculture, forestry, and fishing dominate in NI's border LGDs (especially Fermanagh & Omagh at 44.6% of businesses), alongside strong representation in construction.
- The Republic's border counties also show higher-than-average shares of construction and wholesale/retail enterprises.
- Across the island's border region, micro-enterprises (fewer than 10 employees) overwhelmingly predominate, constraining the scale of local employment growth.

Conclusion

The Northern Ireland–Ireland border region remains a highly interconnected labour market, but persistent structural challenges—skills gaps, lower productivity, lower incomes, and demographic ageing—continue to shape both the scale and the direction of cross-border mobility. While transport links and commuting flows remain strong, disparities in educational attainment, labour force participation, and economic output present ongoing policy and investment priorities for both jurisdictions.

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