

Survey of business links on the island of Ireland

SUMMARY REPORT

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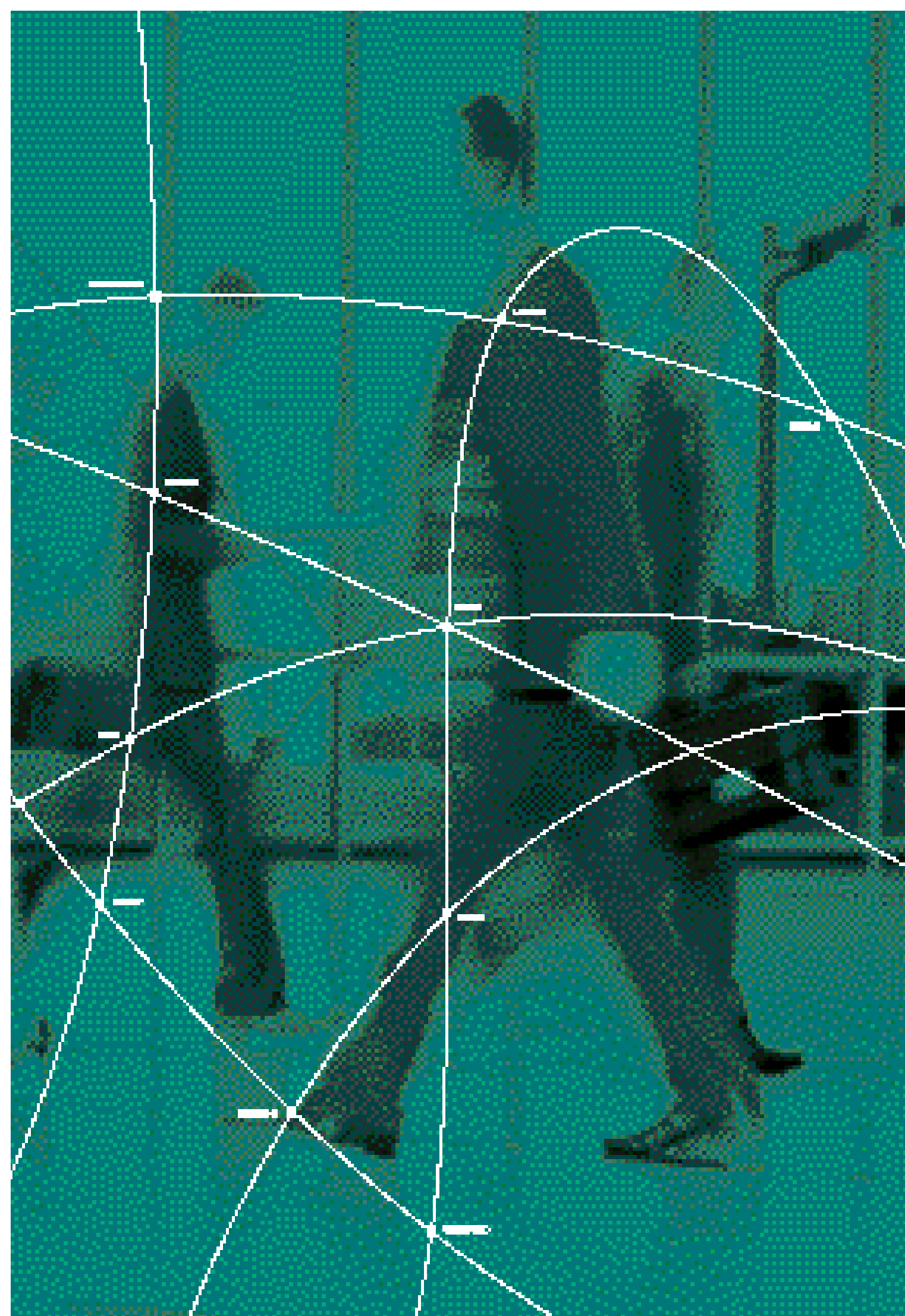
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Note: Figures throughout this report have been rounded up or down (i.e. 1.5 rounded up to 2).





KEY FINDINGS

The main findings of the first ever survey of cross-border business linkages are:

- The most important business linkages between firms in the 2 jurisdictions were import or export linkages;
- Just over 20 per cent of Irish companies have imported from Northern Ireland, and 10 per cent of companies located in Northern Ireland have imported from Ireland in 2001-2002;
- A total of 28 per cent of companies in Ireland were engaged in some level of export activity to Northern Ireland, while 34 per cent of companies in Northern Ireland were engaged in some degree of export activity to Ireland;
- Other *Formal* business linkages¹ with enterprises in the other jurisdiction were a much more commonly occurring phenomenon among companies in Northern Ireland than in Ireland;
- *Informal* linkages² only, were more characteristic of companies located in Ireland than in Northern Ireland;
- Less than one half of companies in both jurisdictions had no business linkage with their counterparts in the other jurisdiction;
- In both jurisdictions, the numbers reporting increases in cross-border exports between 2000-2002 were greater than those reporting decreases;
- In both Northern Ireland and Ireland, the pattern of positive increases in cross-border imports between 2000-2002 were stronger among companies located relatively close to the border;
- A quarter of surveyed companies in both Ireland and Northern Ireland, felt that barriers of some sort exist, which hinder the development of business links between the two jurisdictions;
- More than half of all surveyed companies, North and South, mentioned currency as a perceived barrier to both exports and imports;
- Around 40 per cent of surveyed companies, both North and South, outlined that they would seriously try to develop cross-border business activity between 2002-2005. The expansion of cross-border business linkages was more widely expressed by companies located in the border counties.

1. Other formal linkages include the purchase of raw materials, services or equipment as part of a larger group; collaboration in the form of joint marketing; bidding on contracts or preparation of joint tenders; sharing of technical capabilities; joint staff training programmes; collaboration to meet design or quality requirements; participation in joint distribution networks and co-operation in the production of goods or services.

2. Informal linkages include general business meetings, visits to production facilities or offices, dinners/lunches with senior executives to discuss business, etc.



1. THE OBJECTIVES OF THE REPORT

This report provides an overview of the extent, nature and intensity of cross-border business linkages among companies on the island in 2002. In Ireland, 824 companies were surveyed with 595 in Northern Ireland. The findings were drawn from the cross-border survey of companies carried out on behalf of *InterTradelreland* by the Economic and Social Research Institute (ESRI) in Dublin. The main objectives of the survey were to:

- Define business activities within the island;
- Define business operating problems on the island;
- Define a perception of business problems;
- Provide a quantitative analysis of the:
 - Export linkages;
 - Import linkages;
 - Other formal business linkages; and
 - Informal linkages.
- Define business activities and synergies which could derive from cross-border trade;
- Define perceived barriers to cross-border trade; and
- Define the intention to develop cross-border future business activities.

The output of this report will act as both an indicator where organisations on the island stand in developing trade and business synergies, and a baseline from which any future *InterTradelreland* policy intervention might be judged.

The target group of enterprises under consideration consisted of non-agricultural, private sector companies employing 10 or more persons. The focus of the survey was cross-border inter-firm trading and collaboration, arising from links of a formal and informal nature. The types of formal co-operative cross-border business activity under consideration include:

- Import and export links;
- Joint purchasing of raw materials, services or equipment;
- Collaborative business links in the form of joint marketing;
- Preparation of joint tenders for contracts;
- Joint staff training programmes;
- Sharing of technical capabilities;

- Collaboration to meet the design or quality requirements of a customer;
- Participation in joint distribution networks; and
- Collaboration to produce goods or services.

Less formal links included business contacts between companies in the two jurisdictions but which need not, of themselves, result in a concrete business relationship.

2. METHODOLOGY

A questionnaire was developed by the ESRI in conjunction with InterTradeIreland. All questionnaires were completed on a personally administered basis. This involved an interviewer visiting each respondent and completing the survey on site. The same questionnaire was used in both jurisdictions. In addition, details were recorded in respect of background classificatory variables, including changes in the volume and value of business over the 2 years preceding the survey (2000-2002).

Returned completed questionnaires were edited, checked and entered onto a computer system prior to analysis. The method of analysis used was the Statistical Package of the Social Sciences (SPSS). The unit of data recording and analysis was the business enterprise. The statistical data were “re-weighted” prior to analysis, so that the completed questionnaires are representative of the totality of the population from which they have been selected.

3. PROFILE OF THE TARGET POPULATION

The surveyed companies were broken down according to 5 different categories:

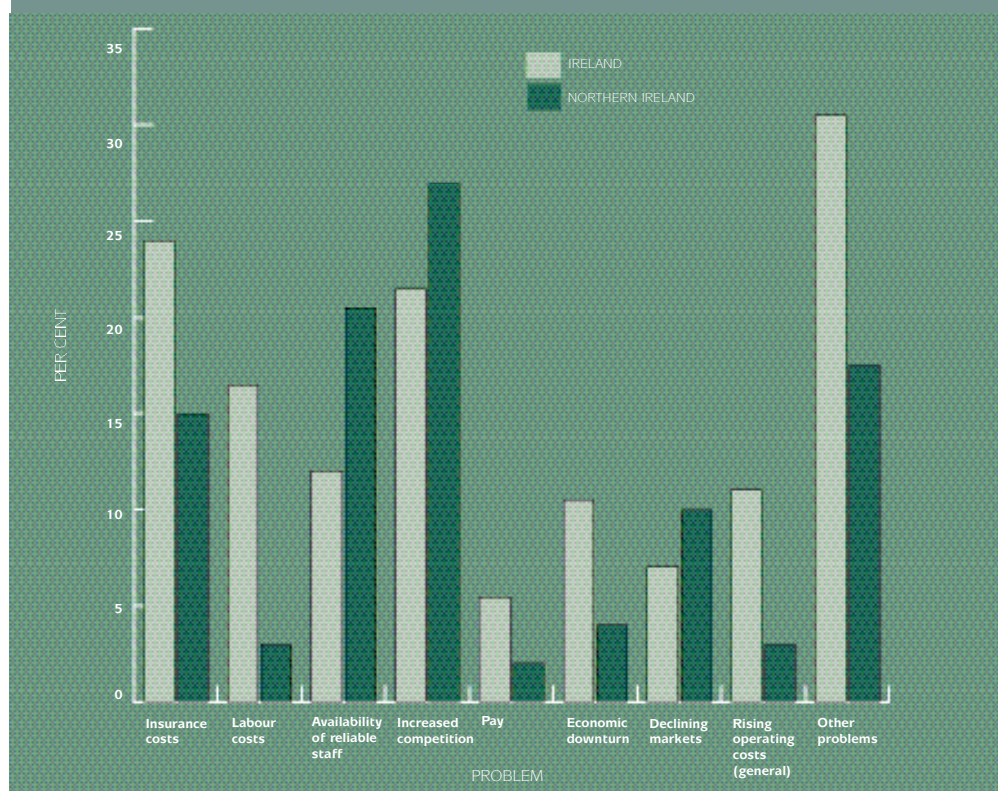
- Economic sector;
- Size;
- Region;
- Distance to border; and
- Nationality.

An aggregate average of 8 per cent of companies recorded having at least one Northern Ireland branch or outlet, which is similar to the percentage of companies in Northern Ireland that have branches or outlets in Ireland (just under 9 per cent). A clear and strong relationship between size of enterprise and incidence of branches or outlets in both Ireland and Northern Ireland was found.

4. THE BUSINESS ENVIRONMENT

To set the context for the question on business linkages a series of questions on the current business environment were asked. Respondents were presented with a set of problems that currently face a business operating within the island environment. Respondents were encouraged to add to this list to ensure the development of a complete environmental picture. For respondents in Ireland, the most significant business problem was insurance costs, which was cited by 29 per cent of companies, compared with 15 per cent of companies in Northern Ireland. An operating problem highlighted both North and South was increased competition, cited by 27 per cent of companies in the North and by 21 per cent of companies in the South. In Ireland companies regarded labour costs (17 per cent) and rising operational costs (11 per cent) as problematic, in contrast to Northern Ireland companies, which viewed these issues as less of a difficulty (4 per cent and 3 per cent respectively). Issues in relation to staff shortages or the lack of adequately skilled labour was cited more frequently by companies located in Northern Ireland (20 per cent) than by companies located in Ireland (12 per cent). Figure 1 outlines the main problems identified. To some extent, these findings may reflect differences in stages of the business cycles in both jurisdictions; or at least differences in exposure to the international economic downturn.

FIGURE 1: PROBLEMS SPONTANEOUSLY RECORDED BY RESPONDENTS IN BOTH JURISDICTIONS



Source: InterTradeIreland/ ESRI survey, 2003

Respondents were then asked to assess a further set of 4 pre-coded problems: commercial/ industrial rates; technological changes; forms and red tape; and the availability of equity/capital. A total of 45 per cent of companies in Northern Ireland cited commercial/industrial rates as a major problem compared with 34 per cent in Ireland. Forms and red tape were seen in Northern Ireland to represent a considerably greater problem than in Ireland (46 per cent and 24 per cent respectively). Companies operating within both jurisdictions cited similar levels of difficulty posed by technological changes and availability of equity/capital (between 13 and 19 per cent).

5. EXPORT LINKS

Table 1 outlines a summary of the incidence and intensity of export activity on the island. Approximately 60 per cent of companies in both jurisdictions operated only within their respective domestic market with no export activity at all. A total of 28 per cent of companies in Ireland were engaged in some level of export activity to Northern Ireland while 34 per cent of companies in Northern Ireland were engaged in some degree of export activity to Ireland. Of those companies located in Ireland, 13 per cent who export, do not export to Northern Ireland. Similar figures recorded for Northern Ireland highlighted that of those who export only 3 per cent do not export to Ireland. Only a small percentage of companies in Ireland (1 per cent) and Northern Ireland (5 per cent) are reliant on the market in the other jurisdiction for more than 50 per cent of their sales.

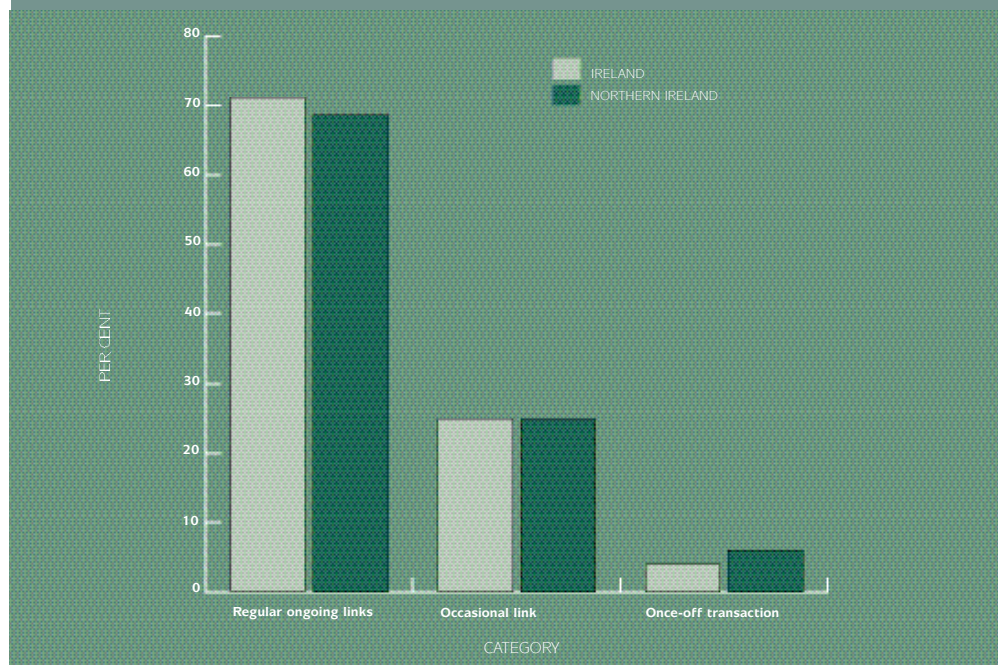
TABLE 1: INCIDENCE AND INTENSITY OF CROSS-BORDER EXPORT ACTIVITY

Firms located in:	Selling to domestic market only	Has exports but not to other jurisdiction	Percentage of output exported to other jurisdiction:			
			0-10	10-25	25-50	50+
Ireland	59.0	13.3	16.7	7.6	2.0	1.4
Northern Ireland	62.8	3.3	11.2	10.9	6.4	5.3

Source: InterTradeIreland/ ESRI survey, 2003

In assessing the strength or intensity of an export business linkage, the questionnaire attempted to identify whether or not the business in question was part of a regular ongoing link, an occasional link or a once-off transaction. Figure 2 shows that approximately 70 per cent of companies that exported cross-border regarded the exporting activity as part of a regular ongoing linkage. Relatively small percentages regarded it as being a once-off transaction – Ireland (4 per cent) and Northern Ireland (6 per cent).

FIGURE 2: REGULARITY OF EXPORT BUSINESS LINKS WITH OTHER JURISDICTION IN 2002



Source: InterTradeIreland/ ESRI survey, 2003

6. IMPORT LINKS

A further aspect of cross-border business linkages is the incidence of cross-border importing activity. Table 2 outlines the incidence of importing activity and the associated value of cross-border imports. 47 per cent of companies located in Ireland and 63 per cent of those in Northern Ireland recorded that they did not import any goods or services from outside their domestic market. A further 33 per cent of companies in Ireland said that although they did import goods or services, they did not import anything from Northern Ireland. Just over 20 per cent of importing companies in Ireland recorded imports from Northern Ireland. In contrast, just over 10 per cent of companies located in Northern Ireland recorded importing goods or services from elsewhere but not from Ireland while just over 27 per cent of companies in Northern Ireland recorded having imports from Ireland.

Overall, it would appear that a substantially smaller percentage of companies in Northern Ireland than in Ireland recorded having any imports from outside their domestic market. A higher proportion of companies in the North, however, recorded having imports from the other jurisdiction than do their counterparts located in the South.

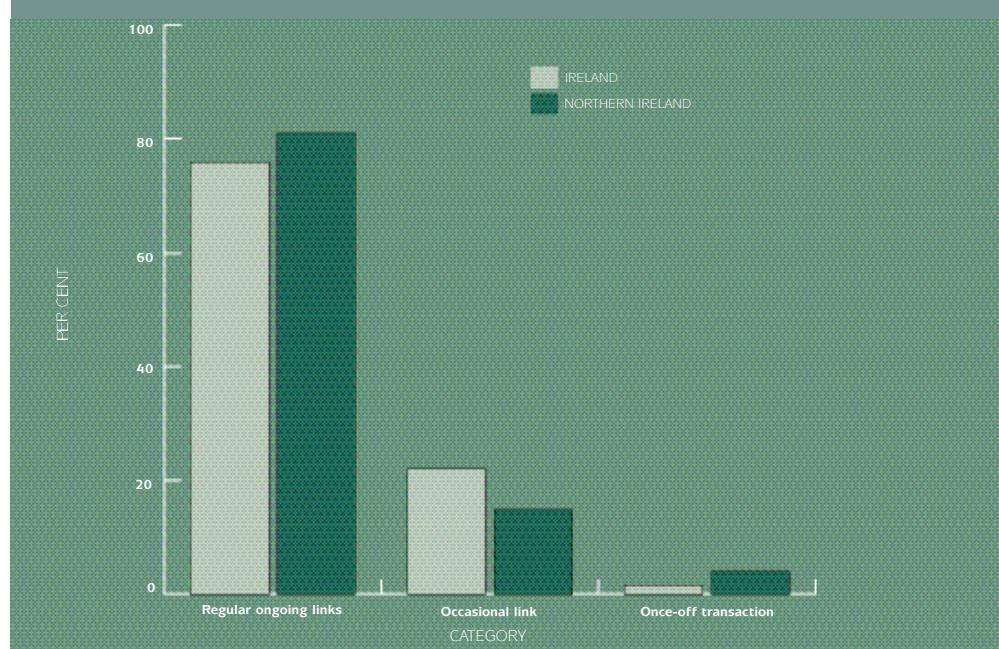
TABLE 2: INCIDENCE OF IMPORTING AMONG COMPANIES IN BOTH JURISDICTIONS

Companies located in:	Selling to domestic market only	Has imports but not from other jurisdiction	Value of Imports from other jurisdiction: Ireland (Euro €)/Northern Ireland (Stg £)			
			Less than 10,000	10,000-100,000	100,000-500,000	More than 500,000
Ireland (Euro)	46.6	33.2	5.6	7.6	3.9	3.2
Northern Ireland (Stg £)	63.4	10.1	19.5	6.1	1.0	-

Source: InterTradeIreland / ESRI Survey, 2003

Figure 3 presents details on the percentage of companies that considered the importing activity as part of a regular ongoing link, an occasional link, or a once-off transaction. A substantial number of companies in both jurisdictions described the relevant business relationship as being a regular ongoing link – Ireland (76 per cent) of companies and Northern Ireland (81 per cent).

FIGURE 3: REGULARITY OF IMPORTS FROM OTHER JURISDICTION IN 2002



Source: InterTradeIreland/ ESRI survey, 2003

7. OTHER FORMAL BUSINESS LINKS³

In addition to export and import links, the questionnaire identified other formal business links that exist between companies in Northern Ireland and Ireland, for example joint purchasing and marketing or co-operative staff training. The results are illustrated in Table 3. 15 per cent of companies in Ireland recorded having participated in group purchasing activities with another enterprise, which could have been located in Ireland, Northern Ireland or elsewhere in the world. The comparable figure for companies located in Northern Ireland was 18 per cent. 3 per cent of all companies in Ireland co-operated with companies in Northern Ireland in the purchasing of raw materials, services or equipment. The comparable figure for companies located in Northern Ireland was 6 per cent. It is clear that a higher percentage of companies located in Northern Ireland participated in all eight types of other formal linkages with enterprises located across the border, than was the corresponding case for companies located in Ireland.

TABLE 3: INCIDENCE OF 8 DIFFERENT TYPES OF BUSINESS CO-OPERATION

ACTIVITY	COMPANIES IN IRELAND		COMPANIES IN NORTHERN IRELAND	
	Per cent participating	Per cent participating with firms in Northern Ireland	Per cent participating	Per cent participating with firms in Northern Ireland
Joint purchase of raw materials/services	15.4	2.5	17.9	5.9
Joint marketing	16.9	2.0	11.5	3.5
Joint bidding or tendering	10.1	1.1	11.2	4.0
Sharing technical capabilities	11.1	2.1	12.1	2.9
Co-operative links to meet customers' design standards	18.5	2.4	16.5	3.6
Co-operative staff training	15.9	0.9	17.7	2.4
Joint distribution networks	6.1	0.9	8.1	2.8
Co-operative links in producing companies' output	14.2	2.5	15.0	5.2

Source: InterTradeIreland/ ESRI survey, 2003

3. Other formal linkages include the purchase of raw materials, services or equipment as part of a larger group; collaboration in the form of joint marketing; bidding on contracts or preparation of joint tenders; sharing of technical capabilities; joint staff training programmes; collaboration to meet design or quality requirements; participation in joint distribution networks and co-operation in the production of goods or services.



8. INFORMAL LINKS

Besides *formal* business links, the analysis is presented on *informal* links that existed between companies, North and South during 2002. These *informal* links include general business meetings, visits to production facilities or offices, dinners/lunches with senior executives to discuss business, etc. 7 per cent of companies located in Ireland recorded having participated in informal business activity with their counterparts in Northern Ireland in 2002. The comparable figure for companies located in Northern Ireland was 4 per cent. To obtain a measure of additional business contact or networking not yet covered in the questionnaire, those companies that had recorded more *formal* cross-border business links were excluded from this analysis.

9. PERCEIVED BARRIERS

Respondents were asked whether or not they felt that any barriers existed which hindered the development of cross-border business links in the areas of imports, exports or business co-operation. 25 per cent of all companies in Ireland and 23 per cent of those in Northern Ireland (employing 10 or more persons) felt that some such barriers to the development of business links between the two jurisdictions exist. Among companies in Ireland, the perception of barriers appears highest in the traditional manufacturing sector and lowest in the personnel services and other services sectors. In Northern Ireland, the perception of barriers appears highest in the traditional manufacturing sector and in the banking/business services sector. However, it is quite low in the other services sector. The survey analysis also presented that in both jurisdictions, distance from the border or geographical location are not major drivers of variation in perceived barriers to cross-border trade and business development⁴. In regard to perceived barriers to exports from Ireland to Northern Ireland, Table 4 illustrates that currency was most frequently cited (fluctuations in exchange rates, difficulties of dealing with a different currency, etc). This issue was raised by 46 per cent of companies who perceived barriers to exporting to Northern Ireland. This issue was reinforced when considering perceived import barriers. 67 per cent of companies in Ireland cited currency as a barrier to importing from Northern Ireland.

A total of 23 per cent of all companies in Northern Ireland felt that barriers of some sort impede business links between the two jurisdictions. This figure is similar to that of Ireland. In Northern Ireland, the perception of barriers appears highest in the traditional manufacturing sector and in the banking/business services sector. However, it is quite low in the other services sector.

4. Although the survey did show evidence of a "distance decay effect", whereby companies further from the border were less likely to trade cross-border.

TABLE 4: NATURE OF BARRIERS CITED BY COMPANIES IN IRELAND IN AREAS OF EXPORTS, IMPORTS AND GENERAL BUSINESS CO-OPERATION

Export barriers		Import barriers		General business barriers to co-operation	
Per cent		Per cent		Per cent	
Currency	45.6	Currency	66.5	Currency	42.3
Lack of co-operation	2.1	Lack of supplies	3.8	Lack of co-operation	22.5
Unable to compete	7.4	Distance	4.9	Cultural difficulties/ generally difficult to conduct business	8.7
Cultural difficulties/ generally difficult to conduct business	10.6	Costs/labour costs	4.4	Distance	8.0
Distance	11.0	Regulation/legislation	4.6	Access to information	7.5
Regulations/legislation	2.4	Access to information	2.7	Regulation/legislation	14.2
Labour costs more favourable in NI	3.6	Supplier Established	2.6	Transport costs	4.2
Access to information	1.5	Difficult to conduct business	5.7	Other	7.2
Limited market in NI	4.5	Transport costs	5.2		
Transport costs	7.2	Other	6.9		
Markets established	8.4				
Other	5.0				

Source: InterTradeIreland/ESRI survey, 2003

Note: Because companies were able to give more than 1 response, totals sum to more than 100 per cent.

Table 5 highlights the perceived export, import and general business co-operation barriers that exist from the point of view of firms in Northern Ireland. In regard to perceived barriers to exports from North to South, the most frequently cited barrier is currency – mentioned by 57 per cent of northern companies which perceived barriers existed. Other issues raised included cultural difficulties/general difficulties in doing business with Ireland (11 per cent) and legislative or regulatory difficulties (23 per cent).

Correspondingly, perceived barriers to importing North to South, again highlighted currency as a barrier. In Northern Ireland, 62 per cent of companies that cited a barrier to importing from Ireland, mentioned aspects of currency.

TABLE 5: NATURE OF BARRIERS CITED BY COMPANIES IN NORTHERN IRELAND IN AREAS OF EXPORTS, IMPORTS AND GENERAL BUSINESS CO-OPERATION

Export barriers		Import barriers		General business barriers to co-operation	
Per cent		Per cent		Per cent	
Currency	56.7	Currency	62.0	Currency	31.6
Lack of co-operation	0.8	Lack of supplies	2.0	Lack of co-operation	6.1
Unable to compete	4.6	Distance	2.0	Cultural difficulties/ generally difficult to conduct business	12.6
Cultural difficulties/ generally difficult to do business	11.2	Costs/labour costs	9.8	Distance	1.3
Regulations/legislation	23.1	Regulation/legislation	8.9	Access to information	13.0
Labour costs	1.1	Access to information	2.9	Regulation/legislation	20.2
Access to information	1.9	Supplier Established	3.8	Transport costs	8.6
Markets established	1.0	Difficult to conduct business	8.2	Other	5.9
Transport costs	4.9	Transport costs	3.8		
Other	1.7	Other	2.4		

Source: InterTradeIreland/ESRI survey, 2003

Note: Because companies were able to give more than 1 response, totals sum to more than 100 per cent.

10. INTENTIONS TO DEVELOP CROSS-BORDER BUSINESS ACTIVITY IN THE FUTURE

Respondents were asked whether or not they felt that they would seriously try to develop their cross-border business activity or links between 2002 and 2005.

A total of 39 per cent of businesses in Ireland employing 10 or more persons said that they would try to do so. The comparable number for business in Northern Ireland was 41 per cent. In both Northern Ireland and Ireland, this view was shared by quite a large percentage of companies across all sectors. This positive outlook for expansion of business links in both jurisdictions was more widely expressed by companies located in the border counties.

Companies which recorded that they had no intention of developing cross-border business activity were asked to give a reason for not doing so. 34 per cent of companies in Ireland felt that it was not necessary for them to develop their business links with Northern Ireland, while 14 per cent reported that they were not interested in doing so, and 10 per cent cited the local nature of their business as the reason for not planning to expand it into Northern Ireland.

Companies in Northern Ireland were also asked why they would not consider developing their business activity or links with Ireland between 2002- 2005. A total of 38 per cent of relevant companies simply said that they were not interested in doing so; 27 per cent said that it was not necessary to do so; and 14 per cent cited the local nature of their business as the reason for not planning to develop business links with Ireland. Finally, respondents were asked whether and why their companies' attitude towards doing business with the other jurisdiction on the island had changed over the last 3 years. A total of 18 per cent of companies in Ireland felt that their attitude had become more positive to doing business with companies in Northern Ireland.

Table 6 presents details on the nature of the change in attitude to cross-border business activities by companies located in Ireland. 47 per cent of companies outlined increased political stability in Northern Ireland as a reason to explain their change in attitude. Other responses were much less common, including easier access to the Northern Ireland market (4 per cent), development of contacts in Northern Ireland (6 per cent), increased business opportunities (6 per cent), and increased potential to develop business relationships (9 per cent).

TABLE 6: NATURE OF THE CHANGE IN ATTITUDE BY COMPANIES IN IRELAND TOWARDS DOING BUSINESS WITH NORTHERN IRELAND OVER THE LAST 3 YEARS

	Per cent
POSITIVE RESPONSES	
Increased political stability in Northern Ireland	46.9
Easier access	3.9
Developed contact in recent years	5.8
Northern Ireland market now a business opportunity	6.3
Ireland now all-island market	5.0
Potential to develop business in Northern Ireland	8.8
NEGATIVE RESPONSES	
Did not meet business expectations	3.8
Currency difficulties	4.4
Not keen to visit Northern Ireland for business	1.5
Company's business links to Northern Ireland have ceased	1.6
Other	13.4

Source: InterTradeIreland/ ESRI survey, 2003

Note: Because respondents were able to give more than 1 response, the total sums to more than 100 per cent.

Table 7 presents details on the nature of the change among companies in Northern Ireland over the last 3 years. This indicates that, for the most part, a more positive attitude had developed towards doing business with Ireland. Thus, 25 per cent said that they now regarded Ireland as a business opportunity; 22 per cent said that there is potential to develop business there; and 13 per cent have a more positive attitude due to the greater political stability.

TABLE 7: NATURE OF THE CHANGE IN ATTITUDE BY NORTHERN IRELAND COMPANIES TOWARDS DOING BUSINESS WITH IRELAND OVER THE LAST 3 YEARS

	Per cent
POSITIVE RESPONSES	
Increased political stability in Northern Ireland	13.3
Easier access	4.6
Developed contact in recent years	4.5
Ireland market now a business opportunity	25.3
Ireland now all-island market	4.2
Potential to develop business in Ireland	21.8
NEGATIVE RESPONSES	
Did not meet business expectations	10.5
Currency difficulties	12.2
Company's business links to Ireland have ceased	1.0
Other	4.6

Source: InterTradeIreland/ ESRI Survey, 2003

Note: Because respondents were able to give more than 1 response, the total sums to more than 100 per cent.

The table also shows that for some Northern Ireland companies sentiment has moved in a more negative direction. Approximately 11 per cent of respondents mentioned that business contact with the South did not meet their expectations, and 12 per cent recorded difficulties with the currency. Another one per cent said that their business links with Ireland had ceased over recent years.

11. CONCLUSION

In consideration of InterTradeIreland's policies and practices in setting performance measurements, InterTradeIreland conducted a survey to act as an indicator of where organisations on the island stand in developing trade and business synergies.

The summary report presents the results of the first ever harmonised survey of business links of companies based in the North and South of the island. In the sections above, individual types of cross-border business linkages engaged in by companies in each jurisdiction are outlined. To provide an overall view of the aggregate or composite level of cross-border business activities in their totality, combinations of these collaborative activities are summarised in the table overleaf:

TABLE 8: INCIDENCE OF COMBINED FORMAL AND INFORMAL CROSS-BORDER BUSINESS ACTIVITY AMONG COMPANIES IN BOTH JURISDICTIONS

Export Links	Import Links	Formal Business Co-operative (8 activities) ⁵	Informal Business Links	Companies Located in:	
				Ireland	Northern Ireland
Participate in this type of link?				(per cent of companies)	
No	No	No	No	49.3	46.7
Yes	No	No	No	19.1	14.1
No	Yes	No	No	11.6	9.0
Yes	Yes	No	No	4.5	10.7
Yes	Yes	Yes	No	2.7	3.7
No	No	Yes	No	2.5	3.4
No	No	No	Yes	7.4	4.2
Yes	No	Yes	No	1.4	5.2
No	Yes	Yes	No	1.5	3.0

Source: InterTradelreland/ESRI Survey 2003

The cross-border export and import linkages referred to in the table are self-explanatory. The formal business co-operation refers to the 8 business links outlined in Table 3. These range from joint purchase of raw materials, services or equipment to co-operative links in producing the company's output. As outlined above the informal links refer to informal visits to plants, offices, business lunches, etc. – general networking activity outside the scope of direct formal business activity.

The figures show that less than one half of companies in both jurisdictions had none of the defined business linkages with their counterparts in the other jurisdiction. The most important linkages were clearly import or export links (with or without some combination of the other linkages outlined.) Informal linkages in isolation (i.e. not combined with some of the more formal cross-border business activities) are more characteristic of companies located in Ireland than in Northern Ireland (7 per cent compared with 4 per cent) respectively. In contrast, "other" general business links or business co-operative ventures with enterprises in the other jurisdiction are a much more common feature among companies in Northern Ireland than in Ireland.

InterTradelreland plan to undertake a similar study on cross-border linkages later this year. The outputs of the second study will be utilised for comparative purposes and will measure the dynamic import, export, other formal linkages and informal linkages on the island of Ireland.

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