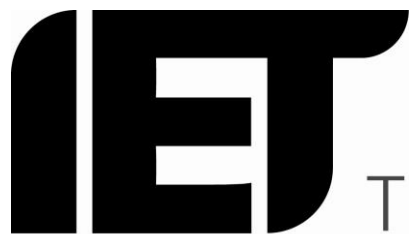


# ‘Brexit and the Irish Border’

*Wednesday 21st March, 2018*

*08.30am – 5.00 pm*

*Drawing Office One, Titanic Hotel, Belfast*



The Institution of  
Engineering and Technology

ENGINEERING POLICY GROUP FOR NORTHERN  
IRELAND (EPGNI)

**engage - Instant Report**



# engage

This 'engagement' real-time e-participation engage event is facilitated by Professor Jonathan Wallace, Dr Michaela Black and Brian Cleland from Ulster University.

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While all comments and votes stored in the engage system are anonymised, the final report from the event will be distributed to all participants, and may be passed to colleagues within the participating organisations, and other interested groups.

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## The engagement

### What is an ‘engagement’?

An ‘engagement’ has evolved out of the concept of a Town Meeting. A Town Meeting is a form of participation in local government practiced in the U.S. region of New England since colonial times, when an entire community was invited by government officials to gather in a public place to formulate suggestions or provide feedback on policy actions.

In its modern version, the electronic Town Meeting (eTM) and now an ‘engagement’, the most fundamental features are that information on the discussion topics are provided thanks to electronic means and the stakeholders can participate in debates and express themselves individually on those issues.

### The main features

The method combines the live aspect of small-scale discussion with information and communication technologies: on one hand it allows rapid transmission of work-group results to a plenary assembly; while on the other it permits surveys of individual participants’ opinions through a polling system.

The ‘engagement’ consists of four different work steps, all aimed at facilitating the participants’ discussion of the themes at issue:

- Information and in-depth investigation, allowing the participants to gain confidence with the topics of discussion;
- Discussion in small groups, allowing reciprocal listening and the confrontation between different perspectives;
- Reflection, during which the results of group work are sent back to the whole assembly; and
- An optional polling step, in which participants may be asked to individually answer questions generated during discussion.

## Contents of the engagement

### Context - Setting the Scene – why was the workshop important?

Next year the Irish border will become the only land frontier between the UK and a member of the European Union. Since 1993, goods have crossed the border without control; there has long been free movement of people and; a common base in regulations and standards within the EU have facilitated the development of both services and supply chains on an all-island basis.

The Northern Ireland border is 310 miles long with over 200 formal crossing points and probably the same number again of informal crossing points. The report of the Northern Ireland Affairs Committee “The land border between Northern Ireland and Ireland”<sup>1</sup> documents the long standing “porous” nature of the border, the large numbers who cross it on a daily basis, and the dominance of small businesses and agriculture in cross border trading. It also notes that the border “has unique political significance due to the history of Ireland”.

The decision of the UK to leave the Single Market and the Customs Union will profoundly affect the Northern Ireland economy. Every business judgement ranging from energy costs through to data transfer will be shaped by policies adopted in the next few months and the issue of the border is still the object of considerable political controversy. The Joint Report of 8 December 2017, which allowed talks to proceed to the next stage, contained suggested solutions for resolving border arrangements, which are not mutually compatible. Recently the draft withdrawal agreement set out by the EU Commission was rejected by the Prime Minister on political grounds. This uncertainty has profound consequences for business. While everyone aspires to fiction-less solutions how can these be achieved on a practical level?

The purpose of this workshop was to address the major challenges and opportunities which withdrawal from the Single Market and the Customs Union will bring for Northern Ireland in general and the border region in particular. Questions which the workshop addressed include: what do the engineering, technology and manufacturing sectors in Northern Ireland need from Brexit? What effect will Brexit have on border communities and how might a future border operate in practice?

The Institution of Engineering and Technology (IET), which spearheads the Engineering Policy Group Northern Ireland, is Europe’s largest professional engineering and technology organisation. Engineering, whether in manufacturing industry, information technology, construction or energy, underpins vital sectors of the Northern Irish economy and provides the platform for innovation in which that economy can grow and create jobs to compete with the rest of the world. IET is not just interested in technical measures, which can ease border interactions, but in the broader picture of promoting a standards regime and a regulatory framework, which provides the bedrock for engineering and business to flourish not just nationally but throughout the world.

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<sup>1</sup><https://publications.parliament.uk/pa/cm201719/cmselect/cmniaf/329/32902.htm>

## **Engagement Topics**

The engagement discussions were divided up into 8 main topics:

**How is Brexit likely to impact the wider business environment in NI?**

**How is Brexit likely to specifically impact your business?**

**What challenges is Brexit likely to create for manufacturing in NI?**

**What opportunities are Brexit likely to create for manufacturing in NI?**

**How much does your business currently depend on the all-island / EU economy?**

**What plans are you making for dealing with Brexit?**

**How might technology help reduce the impact of Brexit on your sector in NI?**

**What is the key message that your sector should deliver to policy-makers?**

## Format of the Engagement

The topics described above formed the basis for planned discussion on the day. The overall planned structure was as follows:

Part 1 What do the engineering, technology and manufacturing sectors in NI need from Brexit?	
08.30	Opening – tea and coffee
09:00	Introduction by Chair – Welcome as Chair
09:15	<b>The Post-Brexit Border: What We Know So Far – Dr Katy Hayward/Maurice Campbell (QUB)</b>
09.45	Introduction to the engage e-participation tool and initial polling questions - Professor Jonathan Wallace, Mr Brian Cleland (Ulster University)
09.55	<b>Discussion 1: How is Brexit likely to impact the wider business environment in NI?</b>
10.10	<b>Discussion 1: Table Ranking Top 3 Issues</b>
10.15	<b>Discussion 1: Feedback</b>
10.20	<b>Discussion 2: How is Brexit likely to specifically impact your business?</b>
10.35	<b>Discussion 2: Table Ranking Top 3 Issues</b>
10.40	<b>Discussion 2: Feedback</b>
10.45	<b>Brexit: A Challenge or an Opportunity for NI? – Mr Stephen Kelly (Manufacturing NI)</b>
11.15	Tea and coffee
11.30	<b>Discussion 3: What challenges is Brexit likely to create for manufacturing in NI?</b>
11.50	<b>Discussion 3: Table Ranking Top 3 Challenges</b>
11.55	<b>Discussion 3: Feedback</b>
12:00	<b>Discussion 4: What opportunities is Brexit likely to create for manufacturing in NI?</b>
12.20	<b>Discussion 4: Table Ranking Top 3 Opportunities</b>
12.25	<b>Discussion 4: Feedback</b>
12.30	Morning Session Wrap-Up – Jamie Delargy
12.45	Lunch
Part 2 What might be the future shape of the border?	
13.30	Introduction by Chair
13.45	<b>Brexit and the Border Corridor – Dr Eoin Magennis (Ulster University)</b>
14.15	Reintroduction to the engage e-participation tool and polling questions for any new participants - Professor Jonathan Wallace, Mr Brian Cleland (Ulster University)
14.20	<b>Discussion 5: How does your business currently depend on the all-island / EU economy?</b>
14.35	<b>Discussion 5: Table Ranking Top 3 Dependencies</b>
14.40	<b>Discussion 5: Feedback</b>
14.45	<b>Discussion 6: What plans are you making for dealing with Brexit?</b>
15.05	<b>Discussion 6: Table Ranking Top 3 Strategic Plans</b>
15.10	<b>Discussion 6: Feedback</b>















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15.15	Tea and coffee
15.30	<b>Can we Have a Smart Border? – Allie Renison (Institute of Directors)</b>
16.00	<b>Discussion 7: How might technology help reduce the impact of Brexit on your sector in NI?</b>
16.20	<b>Discussion 7: Table Ranking Top 3 Impact Reductions</b>
16.25	<b>Discussion 7: Feedback</b>
16.30	<b>Discussion 8: What is the key message that your sector should deliver to policy-makers?</b>
16.50	<b>Discussion 8: Table Ranking Key Message</b>
16.55	<b>Discussion 8: Feedback</b>
17.00	Summary and conclusions – Jamie Delargy
17.15	Close

## Engagement Audience Demographics

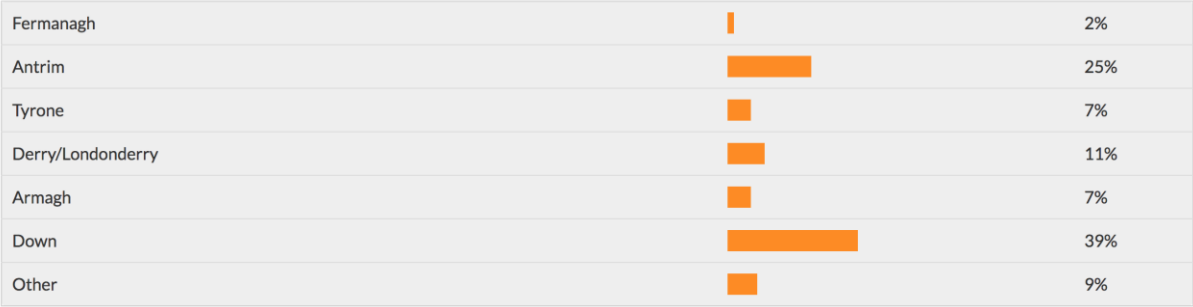
### Which of the following best describes your sector?

Financial Services		5%
Other Professional Services		14%
Agri-Food		0%
Life Sciences		3%
Healthcare		0%
Construction		5%
ICT/Digital		11%
Manufacturing		14%
Creative Industries		0%
Energy		8%
Academia/Research		11%
Regional College		3%
Local Government		3%
Regional Government		5%
Other		19%

### How many people are employed in your organisation?

1-10		22%
11-20		0%
21-50		33%
51-250		0%
251-500		11%
Over 500		33%

### Which county are you from?



Fermanagh	2%
Antrim	25%
Tyrone	7%
Derry/Londonderry	11%
Armagh	7%
Down	39%
Other	9%



- Cost implications - administration etc. – mounting extra costs
- NI does what it is told - can't think like that now!
- Minority government in UK driving something that needs a majority to make it happen effectively.
- NI is behind Republic in economy are we going to be happy with a fudge? If / As economies of NI and Ireland are so interrelated we need to find a fudge to allow it continue
- Have to find an arrangement! - This is about prosperity - What happens if no solution?
- Rol is doing well and we are building on a shaky platform
- Could end up fudging everything
- Have to find a workable solution that is not a train wreck!
- Indecision and uncertainty is current status - we are terrified!
- Give us the bad news so we can get on with it.
- Must find a solution for all
- Border in Irish sea is practical but deeply political - it is one good solution - but government says no - may have to swallow it
- The trade off is key in relation to what the referendum was all about i.e. freedom of movement trade off is what to do to protect it. NI does not really feature on that. How will the other 26 support them?
- 11 percent of trade goes to NI
- Maintaining the UK - that is the brick wall
- Are we well positioned to ensure that NI is protected?
- Will South East England power block allow tripling the Barnett formula to maintain NI equilibrium?
- Engineering growth since Good Friday agreement jeopardised by any lack of stable trading agreement. Need to try to get those in place and in time!
- Cost of energy - single electricity market will introduce more competition. Cheaper prices could benefit energy intensive business
- Loss of migrant workers due to uncertainty and weaker pound
- Many businesses already looking at Dublin offices to retain ability to sell into Europe
- Conversely Rol companies setting up in NI or GB to maintain access to the market
- Ability to trade goods originating in NI under whichever trade agreement was most favourable could make NI a great place to do your final product manufacturing / assembly.

## Question 1: Ranked Impacts

### Table 2

1. Skills
2. Costs
3. Radical change will always be a factor of business - unlike politics - change to survive

### Table 4

1. Existing businesses will have reduced turnover
2. Uncertainty over future arrangements
3. Restrictions on cross border transport

### Table 5

1. Uncertainty
2. Cost addition
3. Supply chain disruption

### Table 7

1. Concerned about train wreck
2. Must work to find a solution
3. Must be economically viable

### Table 8

1. Huge distraction from running a business and time / money in hedging bets
2. Disincentive for foreign investment both due to uncertainty and eventual outcome
3. Agrifood disrupted the most



- Think about shareholder interests
- Even in England the companies in South East are moving to Benelux
- No advantage perhaps to put offices in RoI if not trading in RoI
- Positively speaking if a soft border then NI could do well
- There are sectors that do well on an all-Ireland basis like energy.
- Need to avoid the political baggage that will impede NI
- NI punches above its weight - integrating NI to RoI will be hard.
- Current political minority government makes it tough.
- Continued access to skills - need more certainty on that
- Opportunities - will NI agrifood take a share in GB that they did not have before.
- Perhaps NI would become a preferred supplier than GB as of the EU link
- Also opportunities for low cost support to non EU - ROI have done well
- Would be good if we could adopt what Irish have done - every trick - that is the deal we want
- NI researchers could piggyback on the research links in RoI
- Impact on Larne for east west border
- Compound recent losses in manufacturing sector - employment and rates
- SMEs are less mobile - can't relocate to avoid the problems
- Difficult to find the opportunities because of the uncertainty
- Consultancy businesses not directly affected
- Some businesses in a specific supply chain may no longer be viable - so indirect effect on businesses that rely on those that will become non viable after Brexit
- Events planned for next year, huge uncertainty - does it make sense to plan events/conferences etc. for sectors such as manufacturing to be held in NI
- Spending held back by uncertainty
- Shortage of software engineers exacerbated by reluctance to relocate from other countries
- Loss of interest in NI as place to do business e.g. power generation.
- IET local perspective is big growth over last few years. Don't want to see it stall.



## Question 2: Ranked Impacts

### Table 2

1. Increased black market
2. One survival strategy being considered is open a business model in ROI
3. Lack of clarity is hindering scenario planning for survival

### Table 4

1. Difficulty attracting and retaining European employees
2. Reduction in business income
3. Divergence in sector standards

### Table 5

1. Time disruption and the implication on J.I.T. delivery
2. Burden of bureaucracy
3. Tariff uncertainty and reversion to World Trade Organisation (WTO) rules

### Table 7

1. Potential to capitalise on unique position
2. Could NI now become preferred supplier for goods e.g. agrifood to EU etc.?
3. Concerns that politics could slow down the positive opportunities - must not happen!

### Table 8

1. Uncertainty, holding back on investments, projects commitments etc.
2. Lack of access to EU projects Horizon 2020, etc. - many projects/companies supported by this
3. Common Agricultural Policy uncertainty - cash flow - delays in payments could kill many small farmers and other businesses

### Question 3: What challenges is Brexit likely to create for manufacturing in NI?



- Raw material input costs
- Skilled labour - wage inflation
- No longer attractive to international people skill set in to work in NI
- Manufacturing skills training is not in curriculum currently - Department for the Economy working to address this
- More apprenticeships in industry model needed like South West College
- Leadership in all areas are needed
- Willingness for partnership on developing skills is there
- Business leadership is also needed to drive solutions to all challenges - education
- Innovation in needed - needs HE/FE sector and industry to work closely together to make NI a winner
- Companies - need to innovate more and differentiate more to survive all challenges including Brexit
- Knowledge on tariffs is vital
- Import of materials
- Slowdown in import procedures
- Admin burden or working within the customs regulations
- Speed of response to business changes
- Extended supply chain issue
- Movement of staff across border to work
- Not competitive on cost with added administrative burden
- Additional standards compliance
- Divergence risks access to EU markets
- Duplication of patent applications
- Divergence of contract law
- Cross border legal disputes
- Renegotiation of existing cross border contracts
- Payment of VAT and excise duty
- Supply chain delays
- Increased downtime costs
- Persisting confusion
- Meeting and exploiting opportunities
- Remaining competitive

- Preserving profit margins particularly in small businesses
- Viability of border infrastructure and delays or prejudice caused to business by sabotage
- Ranked choices
- Good engagement happening with CBI and government - see appreciation - can't be adversaries
- Two teams in government looking at Brexit - looking at Trade with EU and otherwise trying to promote unique aspects. No unique insights there yet!
- See that the growth in RoI will be many times more than in NI - what should we do for NI economically to get a balance?
- We need to stop making it up as we go along
- Food manufacturers have issues attracting people to come on-board so will need to use more automation and for agriculture that could be hard to do - need hands not machinery.
- N.B. that migrant workers are returning home as their own home economies are doing ok - need migrant work / support but it is leaving. We need people to fill the jobs.
- Is hard to get investment unless you make the right amount of money. Think of agrifood - margins are low as it is so hard to attract the right investment.
- Profit centres are easier to protect than cost centres in the changed environment.
- Cost centres still contribute to the economy - need to see the necessary conditions of a robust NI economy - this needs to integrate with RoI
- Beware the catch up issue where the RoI will adjust to stay more attractive as an economy
- Challenge - doing manufacturing here, a lot, a challenge is to
- Do more or just to defend what we have.
- Could be an opportunity cost and remember the Brexit situation and the political situation causing paralysis.
- If border is hard then we have big challenges.
- Weak pound, expensive imports
- Customs costs money, wastes time, delays goods/materials
- Tariff increases transform the economics of a complex product with a long tail
- Will our products including agrifoods be acceptable into EU market
- Insufficient time to put things in place
- Which regulations will exist independently of EU membership CE mark, etc.?
- Recalls of products?
- Need clarity on where regulations may diverge
- Don't know what we don't know
- Non-tariff barriers
- Will approval bodies reach agreement on equivalence
- If your supply chains are GB or outside EU you are ok
- It will all just cost more to do business.

### Question 3: Ranked Challenges

#### Table 2

1. Knowledge on tariffs is vital
1. Labour costs inflation
2. Political and industrial leadership

#### Table 4

1. Additional import costs
2. Divergence of standards, laws, etc.
3. No longer competitive with EU competitions

#### Table 5

1. Competitiveness of small margin businesses
2. Viability of border infrastructure and prejudice caused by security closures
3. Redline goods. J.I.T. no longer viable.

#### Table 7

1. We see growing workforce issues with migrants
2. Need to stay attractive for investors
3. Need to defend our patch and to better align with RoI - that is challenging

#### Table 8

1. Regulations - uncertainty, burden
2. Costs of importing goods (weaker pound, potential tariffs)
3. Non-tariff barriers

#### Question 4: What opportunities are Brexit likely to create for manufacturing in NI?



- December agreement details will drive this
- Being that bridge and building upon all opportunities will be vital
- Joint ventures with Europe and potential opportunities - strategic alliance - visas etc.
- Increased InvestNI strategic support to look for opportunities outside EU
- Young entrepreneurs growth
- Intrapreneurs - can grow existing companies looking for new opportunities
- Strategic negotiations - getting out there and build partnerships for UK market - become the bridge for Europe and UK
- Tougher UK migration rules - restricted skill force - where else could NI companies recruit from?
- A special arrangement for NI acting as a bridge between UK and EU
- Firms will be forced to explore export markets outside the EU
- NI will be forced to shift its focus to other sectors, manufacturing
- Opportunities to establish joint ventures with EU businesses
- May drive innovation in companies, e.g. automation.
- More competitive in GB market
- Possible new markets if business has the required time and resources necessary - and tolerance of a long timescale before any benefits
- Opportunity to develop skills locally
- Look beyond the EU - look at the export percentages. 6% of export goes outside EU. Could be Intellectual Property export.
- If soft border then only land border with EU is NI. Could see new ferry routes from NI or Ireland. Or even a train to Scotland!
- Competitive disadvantage of being island off an island is not that big a concern, need to question this
- Need to look at the other markets like Canada, China etc. Potential to grow opportunities.
- Creates specialism in logistics and distribution - opportunities too for automation as migrants leaving / gone.
- Adversity is the mother of invention - will need to reset. Will drive invention - there is always opportunity, we always come through things
- Opportunity for companies to start thinking differently - need to nudge to try different things to simply do business. Need business people to make decisions and keep things moving.

- People to consider opportunities that were ignored before - just tailed onto London before, not now. We are not the first - learn from New Zealand, etc.
- We have to remember that there were genuine gripes with the EU and it could have changed anyway - nothing is pickled in formaldehyde.
- Brexit has been distorted by the big data / analytics - don't let it be.
- Aviation industry is strong and not based on an EU supply chain
- Manufacturing companies interested in serving UK market will set up here
- Government can offer deals to RoI companies to set up in NI similarly for companies from other EU countries
- Forensic analysis of suppliers needed to understand this
- M&A to acquire presence in NI
- Needs strong financial incentives to bring this to NI rather GB
- Focus on strong clusters e.g. 'Renewables', try to soak up losses in other sectors
- Retraining needed, bring in experts to lead
- Target suppliers to current big employers and persuade them to set up operations here
- Galvanizing people to re-establish connections with others rather than rely on status quo
- Showcase events
- Lobby government to establish right linkages/relationships
- Redirect InvestNI on to right problems
- NI free trade zone. Freedom to trade both to EU and under any UK Trade Agreements. Pulls companies to NI to set up final stage in their product manufacturing.

## Question 4: Ranked Opportunities

### Table 2

1. Being that bridge and building upon all opportunities will be vital
2. Strategic negotiations - getting out there and build partnerships for UK market - become the bridge for Europe and UK
3. More scholarships opportunities for current students to stay in NI firms and get Industry backing

### Table 4

1. Firms may be forced to look outside RoI and EU for business
2. Opportunities to establish Joint Ventures with EU companies
3. Challenge may focus government and education on Manufacturing sector as wealth generator

### Table 5

1. High potential mark-ups but requires long time scales to develop
2. Opportunity to reverse or address skill shortages in local economy
3. Capitalize on bridge to both markets [if NI still in Customs Union or Single Market]

### Table 7

1. New trade links - we should learn from others who have done this
2. New chances to specialise in logistics.
3. Opportunities for back office functions - we are highly skilled workforce with English language as first language
4. Consolidate the existing links to EU countries too – i.e. low hanging fruit opportunities.

### Table 8

1. Push trading relationship elsewhere - we have products they will buy
2. Bridge not wall - free trade zone for NI originated goods
3. Invest in sectors where the market is global and we have skills

## Question 5: How much does your business currently depend on the all-island / EU economy?

It was decided not to discuss Question 5 in order to let attendees away earlier in the afternoon.

## Question 6: What plans are you making for dealing with Brexit?



- Plan how to grow your business - Brexit just one part of it
- Communication with workers as you know
- Positive messages moving forward - avoid negative potential impact - e.g. recession
- Part of plan remember energy needs - plan renewables - minerals - plan where will we get these
- An Assembly in place would help
- Joint academic appoints between NI and Rol
- Maintaining closer contact with supply chain
- Watch issues as they develop
- Attend events like this
- Uncertainty prevails. Planning highly contingent,
- Requirement in any event for a starting point
- Proposed planning in relation to modified regulatory requirements
- Need to consider impact on the Brexit corridor - plan not to hurt
- Not really have plans in place!
- Believe that few have plans in place - need a list to prepare for Brexit - so is hard to plan for it. Is it just to open a base in Dublin?
- How exposed are you to some of the potential impacts - need to think about that rather than plan for it.
- Need to think of showstoppers, what-ifs. Hard to plan for something that is so unknown is hard – e.g. supply chain issues and how exposed we are - these need to be thought through and composition of workforce in terms of key workers - both need to be thought out.
- As a service industry people rely on us for advice but how can we provide this in this unique situation?
- Very informal planning - councils looking at day one readiness operating in a vacuum haven't yet done formal scenario planning.



- Consultancy firms working with clients on multi-level scenario planning - it's always worst case planning, with people now thinking World Trade Organisation is default i.e. more likely than alignment
- No UK suppliers for a lot of stuff so not possible to restructure supply chain so that Brexit is non-event
- Companies selling to UK will not walk away from their customers
- Setting up Dublin office
- Dublin office isn't to avoid tariffs, (it's a service) - it's to have a face in that locale.

**Question 7: How might technology help reduce the impact of Brexit on your sector in NI?**

As Allie Renison's presentation (as included in the appendices to this Instant Report) discussed many aspects of the potential for technology for a SMART Border and also resulted in a thorough Q&A with the audience, it was decided to move directly to Question 8 in the interest of the audience getting away after a long day's interactive discussion.

### Question 8: What is the key message that your sector should deliver to policy-makers?

#### Table 2

Grasp whatever opportunity there is from Brexit for NI - we're being offered a chance to enjoy best of both worlds!

#### Table 4

Realise that a hard Brexit isn't compatible with a soft border.

#### Table 5

Stay in the Customs Union!!!!

#### Table 7

Longer transition period needed for NI and UK?

#### Table 8

Hurry up. Give us clarity. What's changing and what's staying the same? If we know what stays the same we know whether we need to react or not!

### Final End of Workshop Poll

After today's event, how confident are you that a solution can be found that accommodates everyone?

Very confident		4%
Quite confident		21%
Not sure		14%
Less confident		14%
Not confident at all		46%















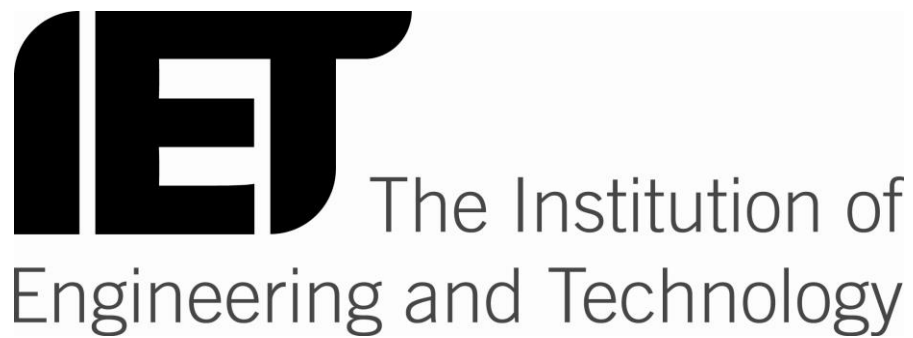












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