

A higher skills ambition for Northern Ireland

**A revised skills outlook for Northern Ireland
for 2035**

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The Open College Network Northern Ireland (OCN NI) is a UK recognised Awarding Organisation based in Northern Ireland. We are regulated by CCEA Regulation to develop and award regulated professional and technical (vocational) qualifications from Entry Level up to and including Level 5 across all sector areas. In addition, OCN NI are also regulated by Ofqual to award similar qualifications in England.

We are an educational charity and an Awarding Organisation that advances education by developing nationally recognised qualifications and recognising the achievements of adults and young people. We work with centres such as Further Education Colleges, Private Training Organisations, Voluntary & Community Organisations, Schools, SME's and Public Sector bodies to provide learners with opportunities to progress into further learning and/or employment.

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Foreword

I am pleased to introduce this important report, commissioned by OCN NI and developed by Learning and Work Institute, which offers a timely and evidence-driven analysis of Northern Ireland's current and future skills landscape. Its findings are both encouraging and challenging. They reaffirm the progress we have made as a region, while also highlighting the scale of the work still required to ensure that every learner, regardless of background, age or circumstance, has the opportunity to develop the skills needed to thrive in a modern, dynamic economy.

Skills are at the heart of Northern Ireland's long-term prosperity. They influence productivity, employment, health, social mobility and community cohesion. Yet, as this report clearly illustrates, our skills profile continues to lag behind that of many comparator countries, particularly in relation to low and intermediate-level qualifications. While the proportion of adults educated to Level 4 and above is set to grow significantly by 2035, Northern Ireland is projected to have a comparatively large cohort of people with low or no formal qualifications, and a persistent shortfall in intermediate skills. These gaps shape the opportunities available to individuals and limit the capacity of our economy to adapt to technological change and shifting labour market demands.

As Northern Ireland's leading awarding organisation for vocational and technical qualifications, OCN NI remains committed to addressing these challenges head-on. We believe deeply in the power of accessible, inclusive and high-quality learning. Our qualifications are designed with and for employers, educators and communities, ensuring that learners can progress into good jobs, meaningful careers and lifelong learning pathways.

This research also offers a clear message for policymakers, employers and the wider skills ecosystem: progress is possible, but it requires sustained investment, coordinated action and a long-term commitment to lifelong learning.

On behalf of OCN NI, I extend my thanks to Learning and Work Institute for their rigorous analysis and partnership. I hope this report prompts renewed dialogue, sharper focus and collective ambition across our education, economic and civic systems.



Martin Flynn,
Chief Executive, OCN NI

Executive summary

Improved learning outcomes drive development in economic growth, social inclusion and community cohesion. Northern Ireland has experienced consistently weaker economic growth and lower productivity than the UK average, with lower levels of employment and higher rates of economic inactivity. There also continue to be significant disparities in income, educational attainment, health outcomes and life expectancy within Northern Ireland.

Widening access to learning and skills is a necessity to meet these challenges and to harness the opportunities of the 21st century. The good news is that Northern Ireland is making progress, particularly at higher education level. Yet despite increased strategic focus, Northern Ireland continues to lag behind the UK average and Ireland in terms of adult skills and qualifications, particularly at intermediate qualification level.

In 2021 we published our report on a higher skills ambition for Northern Ireland, which analysed the qualifications profile of Northern Ireland and projected it forward to 2030. This report updates our previous work, by projecting Northern Ireland's qualification profile to 2035, exploring Northern Ireland's potential progress over the next decade.

By 2035, more than one in two 25-64 year olds in Northern Ireland (55%) is projected to have a higher education qualification, broadly in line with the UK as a whole (56%). This is relatively strong growth (from 46% in 2021), comparable with other nations and regions of the UK. Northern Ireland is projected to remain ahead of Liverpool City Region (53%), Greater Manchester (52%) and Wales (50%). Although it is likely to remain behind London (71%), the gap is expected to narrow.

The figures for lower-level qualifications show a different story. The good news is that the projections continue to show a decline, with the proportion of people with no qualifications projected to drop from 12% to 8%, and the proportion with below Level 2 qualifications to drop from 12% to 10%. However, this means that by 2035 close to one in five (18%) of 25-64 year olds in Northern Ireland still won't have qualifications at GCSE or equivalent level. Northern Ireland would continue to lag the UK as a whole (16%), and areas such as London (14%), Scotland (16%) and Liverpool City Region (17%).

Northern Ireland is also projected to experience a small decline in medium-level qualifications, since progression from lower to medium qualifications is expected to be slower than progression from medium to high. The limited size of the workforce qualified to level 2 or level 3 may have implications for progression and the supply of technical skills.

International comparisons show a similar story. Northern Ireland is relatively well positioned internationally in terms of high-level qualifications, above the OECD, EU and G7 average in both 2022 and 2035 – although its relative ranking is expected to decline

slightly over time due to faster improvements in other countries, and it is projected to remain behind the Republic of Ireland. However, it is projected to continue to rank poorly for the proportion of the population with low-level qualifications, with a higher proportion than the OECD, EU or G7 and most of its peers. In contrast, the Republic of Ireland is expected to remain at the top of the rankings.

The results show a mixed picture, with strength in higher education qualifications alongside persistent weaknesses at intermediate and lower levels. Although qualification profiles are improving, Northern Ireland is running to stand still as others improve too and often from a higher base. It is clear that more work is needed to ensure Northern Ireland's workforce have the skills needed to meet its full economic potential.

Recommendations

1. **Aim for world-class learning and skills.** Northern Ireland's qualification profile continues to improve, but is projected to lag internationally in the high proportion of its workforce with low level qualifications, and the low proportion with medium level qualifications. There should be renewed focus on supporting increased attainment for people with qualifications at lower levels. The NI Executive should consider aiming for 75% of adults to be qualified to level 3+. Progress should also be maintained in increasing higher level qualifications.
2. **Whole government approach to skills.** Lifelong learning is of increasing importance in meeting long-term economic challenges. There has been an increased skills policy focus in Northern Ireland, and this should be maintained. However, more work is needed on building a whole government approach, with greater coordination between different departments and tiers of government. Lifelong learning should become a golden thread across all public services.
3. **There should be greater investment in learning and skills.** Improvements can only be delivered if investment rises. Extra public investment is needed, which also needs to be matched by increased investment by employers in workforce training and by individuals in their own development.
4. **Monitor progress.** Collection and analysis of detailed monitoring data is essential to keep track of progress and the effectiveness of skills provision. There should be greater focus on ensuring that programme data is collected and published, with explicit linking to wider policy objectives.
5. **There should be greater skills policy cooperation** with the Republic of Ireland and with the other nations and regions of the UK, to learn from existing good practice in promoting lifelong learning and skills development, and in how government and third-sector organisations can more effectively work together.

Introduction

Improved learning outcomes drive development in economic growth, social inclusion and community cohesion. These areas are linked to education and skills and are a precursor to fostering a strong learning culture in modern economies. Yet for decades, Northern Ireland and the UK as a whole have lagged behind comparator countries, particularly for intermediate skills. Recent research found that Northern Ireland consistently lags behind the Republic of Ireland in relation to qualifications, with knock-on impacts to economy activity and productivity.¹ Economic, educational and health inequalities are prevalent in Northern Ireland with relative poverty and lower life expectancy in deprived areas being an ongoing concern.²

For many of the main challenges of the 21st century, learning and skills will be crucial. They are an engine of growth and driver of social justice. Long-term solutions must be provided to promote economic prosperity and social inclusion.

In 2021 we published our report on a higher skills ambition for Northern Ireland.³ This report analysed the qualifications profile of Northern Ireland, projecting it forward to 2030, comparing this to projections for other countries. We found the key challenge faced by Northern Ireland to be a high proportion of people with no or low qualifications and a relatively low proportion of people with higher level qualifications. On both metrics, Northern Ireland performed comparatively worse than the UK as a whole and was behind many other countries.

Why learning and skills matter?

Learning and skills are fundamental to Northern Ireland's capacity to achieve sustainable economic growth, social inclusion and long-term resilience. While the relationship between skills and prosperity is well established across advanced economies, its significance is particularly acute in Northern Ireland due to a combination of historically lower skill levels, weaker productivity performance, high economic inactivity and persistent social and health inequalities. In this context, learning and skills are not solely an education or labour market issue but a core determinant of wider social, economic and well-being outcomes.

Skills, productivity and economic growth

Northern Ireland has experienced consistently weaker economic growth and lower productivity than the UK average. Productivity per hour worked remains significantly below the UK level, reflecting both industrial structure and workforce skills. Data from the Office for National Statistics suggests that in 2023, Northern Ireland was 12.4% less

¹ Department for the Economy (2025) [Research Bulletins 2025](#)

² Department of Health (2025) [Life Expectancy in Northern Ireland 2022-24](#)

³ Learning and Work Institute (2021) [A higher skills ambition for Northern Ireland](#)

productive that the UK average in terms of output per hour worked.⁴ A strong body of evidence shows that skills contribute directly to productivity growth by enabling innovation, technology adoption, improved management practices and more effective use of capital and infrastructure.⁵ International evidence, including from the OECD, highlights skills as a central driver of competitiveness and growth, particularly in small, open economies.⁶

Despite improvements in qualification levels, Northern Ireland continues to have a higher-than-average share of adults with low or no qualifications and a lower proportion with higher-level qualifications compared with the UK average, the Republic of Ireland and many OECD comparators.⁷ These gaps constrain productivity growth and limit the economy's ability to move into higher-value, more resilient activities. This is particularly concerning given labour market projections showing rising demand for higher-level and transferable skills alongside declining demand for low-qualified labour.⁸

Employment, participation and economic inactivity

Learning and skills strongly shape employment outcomes and labour market participation. The employment rate in Northern Ireland for the period of September-November 2025 was estimated to be 72.0% while the UK average was 75.1% in the same period, almost three percentage points lower.^{9 10} In Northern Ireland, the relationship between qualification level and employment is especially pronounced. Individuals with higher level qualifications are significantly more likely to be in work, while those with low or no qualifications face much higher risks of unemployment and economic inactivity.¹¹ Northern Ireland also has persistently higher economic inactivity than other UK regions. Data from 2021 shows that Northern Ireland had an estimated economic inactivity rate of 29% compared to 21% in the UK. This is likely driven by long term sickness, caring responsibilities, demographic change- and the legacy of past conflict.¹²

Adult learning therefore plays a vital role in supporting people to enter work, progress in employment, retrain following job loss and remain economically active for longer. However, UK -wide evidence shows that participation in adult learning has fallen sharply over the past decade, with the largest declines among adults with lower

⁴ Office for National Statistics (2025) [Regional and subregional labour productivity, UK: 2023](#)

⁵ Department for Business, Innovation and Skill (2013) [The relationship between graduates and economic growth across countries](#)

⁶ OECD (2012) [Skills for Competitiveness: A Synthesis Report](#)

⁷ Learning and Work Institute (2021) [A higher skills ambition for Northern Ireland](#)

⁸ Department for the Economy (2025) [Skills Barometer 2023 - 2033 | Department for the Economy](#)

⁹ Department for the Economy (2026) [Labour Market Statistics – January 2026](#)

¹⁰ Office for National Statistics (2026) [Employment in the UK: January 2026](#)

¹¹ Department for the Economy (2025) [Skills Barometer 2023 - 2033 | Department for the Economy](#)

¹² Devlin et al. (2023) [Economic Inactivity in Northern Ireland - Report 1 | Queen's University Belfast](#)

qualifications and those in more deprived areas.^{13,14} For Northern Ireland, where reliance on adult upskilling is particularly high, this trend risks reinforcing economic inactivity and limiting inclusive labour market recovery.¹⁵

Social inclusion, inequality and wellbeing

Learning and skills are also critical to reducing inequality and supporting social inclusion, both longstanding priorities in Northern Ireland. The region continues to experience significant disparities in income, educational attainment, health outcomes and life expectancy between more and less deprived communities.¹⁶ Skills influence these outcomes through multiple channels: higher skills are associated with higher earnings and greater employment security, while essential skills such as literacy, numeracy, digital and financial capability support everyday participation in society and are linked to improved wellbeing.¹⁷

In the Northern Ireland context, learning has an additional role in supporting community cohesion and confidence-building. Participation in education and training is associated with greater civic engagement and social participation, reinforcing the role of learning as a form of social infrastructure that underpins inclusion and shared prosperity.¹⁸

Changing policy context

Our 2021 report outlined the importance of setting a higher ambition for skills in Northern Ireland. Since then, there has been a welcome strategic focus in Northern Ireland on skills development.

In March 2022, the Department for the Economy published its skills strategy for Northern Ireland - Skills for a 10x economy.¹⁹ The aim of the strategy was to set a strategic framework for the development of the skills system to 2030, with the goal of increasing the proportion of STEM (Science, Technology, Engineering, and Mathematics) graduates, and increasing the proportion of working age adults with qualifications at level 2 and above and at level 3 and above. This was followed by the Digital Skills Action Plan in September 2024,²⁰ which aims to develop alternative pathways into the digital sector.

¹³ Learning and Work Institute (2025) [The workforce learning slowdown?](#)

¹⁴ Learning and Work Institute (2024) [The great skills divide: how learning inequalities risk holding the UK back](#)

¹⁵ Learning and Work Institute (2017) [Healthy, Wealthy and Wise: The impact of adult learning across the UK](#)

¹⁶ Department for Communities (2021) [Households Below Average Income: Northern Ireland 2019/20](#)

¹⁷ Learning and Work Institute (2021) [A higher skills ambition for Northern Ireland](#)

¹⁸ Learning and Work Institute (2017) [Healthy, Wealthy and Wise: The impact of adult learning across the UK](#)

¹⁹ Department for the Economy (2022) [Skills for a 10x economy - Skills Strategy for Northern Ireland](#)

²⁰ Department for the Economy (2024) [Digital Skills Action Plan 2024 - 2034](#)

In February 2024, the Economy Minister's Economic Vision was published, setting out four key policy objectives for the Northern Ireland economy: good jobs; raising productivity; decarbonisation; and regional balance.²¹ The Department for the Economy's Business Plan 2024-25 outlined a focus on skills as a key component of delivering the Economic Vision.²² To support this, a Skills Action Plan was published in October 2025, setting out agreed actions for the Department in relation to skills over the next three years and including a dedicated skills fund.²³

Support for skills and learning is the largest part of the Department for the Economy's budget, with £470 million spent in 2023-24.²⁴ Funding is available for a wide array of skills programmes, such as Step Up,²⁵ which supports young people and women returners into employment, and Skill Up,²⁶ which provides a wide range of free accredited courses for adults. There has also been an increasing focus on apprenticeships, with apprenticeship starts increasing by 70% between 2019-20 and 2023-24.²⁷ However, the Northern Ireland Audit Office reports that annual skills spending by the Department had reduced by 7%, or £170 million, between 2019 and 2024.²⁸ Since spending on apprenticeships increased by 36% during this period (albeit peaking in 2021-22), there have been larger drops in other parts of the budget. For example, spending on Skills for Life and Work dropped by 40% over this period; although this may have been mitigated by the introduction of skills programmes (as described above). Employer investment in training has also continued to decline: the 2024 Employer Skills Survey shows that employers in Northern Ireland are investing 28% less per employee compared to 2011; this is similar to the equivalent figure of 29% for the UK as a whole.²⁹ There are also concerns about the impact of the end of the UK Shared Prosperity Fund on skills support provided by voluntary and community sector organisations.³⁰

Despite this strategic focus, adult participation in learning in Northern Ireland has remained relatively flat since 2016. Labour Force Survey data shows that in 2024 18.7% of 25- to 64-year-olds had participated in education or training; a slight increase since 2021 (17.3%), but broadly comparable to levels pre- and post-pandemic. This is substantially lower than the equivalent UK figure of 26.0%.³¹ Geographical analysis of

²¹ Department for the Economy (n.d.) [Minister's Economic Vision](#)

²² Department for the Economy (2024) [Delivering the Economic Vision: A three year forward look & 2024/25 Action Plan](#)

²³ Department for the Economy (2025) [Skills Action Plan](#)

²⁴ Northern Ireland Audit Office (2024) [Developing the Skills for NI's Future](#)

²⁵ nidirect (n.d.) [Step Up – the person-centred skills project](#)

²⁶ nidirect (n.d.) [Skill Up](#)

²⁷ Youth Training Statistics and Research Branch and Department for the Economy (2025) [ApprenticeshipsNI Statistical Bulletin](#)

²⁸ Northern Ireland Audit Office (2024) [Developing the Skills for NI's Future](#)

²⁹ Department for Education (2026) ['Investment in training' from 'Employer Skills Survey'](#)

³⁰ NICVA (2025) [NICVA's #NICantWait Campaign - A Future Worth Funding](#)

³¹ NISRA (2025) [Highest qualification and participation in education and training 2024](#)

L&W's 2023 Adult Participation in Learning Survey found that respondents in Northern Ireland were more likely than those in the UK to report multiple barriers to participating in learning. As in the UK, the most common barriers to participation relate to cost, feeling too old for learning and time pressures.³²

A report by the Northern Ireland Audit Office highlighted a lack of progress against strategic goals, with concerns about monitoring of targets and of a lack of a joined up whole-government approach.³³ Similar concerns were raised by the Public Accounts Committee of the Northern Ireland Assembly, which highlighted a need for more effective governance arrangements and better use of monitoring data. It also highlighted a lack of evidence of impact from skills programmes, and a lack of alignment between funding, programmes and the overall skills strategy goals.³⁴ Both reports highlighted the need for a renewed focus to meet Northern Ireland's adult skills goals.

Looking to the future, the Northern Ireland Skills Barometer projects that between 2023 and 2033 there will be an undersupply of the skills needed across the Northern Irish economy³⁵. In particular, they project a shortage of mid-tier skills (level 3 to 5) and of graduates (level 6 to 8), with an oversupply of workers with low-level qualifications (level 2 and below).

This report

The evidence is clear that learning and skills are a strategic necessity for Northern Ireland. Skills underpin productivity, employment, social inclusion, health outcomes and long-term resilience. Yet despite increased strategic focus, there has been limited concrete progress, with Northern Ireland still lagging behind the UK average and Ireland in terms of adult skills and qualifications.

This report updates our previous work, by projecting Northern Ireland's qualification profile to 2035 in order to explore Northern Ireland's potential progress over the next decade.

³² Learning and Work Institute (2024) [Adult Participation in Learning Survey 2023: Northern Ireland](#)

³³ Northern Ireland Audit Office (2024) [Developing the Skills for NI's Future](#)

³⁴ Northern Ireland Assembly (2025) [Report on Developing the skills for Northern Ireland's future](#)

³⁵ Department for the Economy (2025) [Skills Barometer 2023 - 2033 | Department for the Economy](#)

Projecting Northern Ireland's qualification profile

More than one in two 25-64 year olds in Northern Ireland is projected to have a higher education qualification by 2035, broadly in line with the UK as a whole. The proportion of 25-64 year olds with a level 2 or lower as their highest qualification is projected to fall from 24% to 18%, but remain higher than the UK average and international comparators. Qualification profiles are improving, but Northern Ireland is running to stand still as others improve too and often from a higher base.

The qualifications profile of the population has generally improved over time. This is largely a product of the higher qualifications of young people entering the labour force compared to those of older people leaving it, as well as qualifications gained by people as adults.

This report projects forward Northern Ireland's qualification profile for the 25- to 64-year-old population using trends over the last 14 years (2007 to 2021) for different age groups from the Labour Force Survey (LFS) within the population and applying these to the Office for National Statistics (ONS) population projections (except for people aged 25-29, who are assumed to have the same qualification profile as 25-29 year olds today).³⁶

Qualifications are grouped into:

- No qualifications
- Below level 2 (including 'other' qualifications)
- Level 2, five GCSEs at grades A*-C or equivalent
- Level 3, three A levels or equivalent (including trade apprenticeships)
- Level 4+, higher education.

To support comparisons between time periods and geographical areas, we have also further grouped qualifications based on OECD definitions into:

- Low qualifications (no qualifications and below level 2 qualifications, including other qualifications)
- Medium qualifications (level 2 and level 3 qualifications)
- High qualifications (level 4 qualifications and above)

The projections set a floor of 5% of people having no qualifications and a ceiling of 65% of people having higher education qualifications. These are intended to be reasonable

³⁶ This age group has a relatively higher proportion of people with high qualifications, thus limiting the room for further improvement.

benchmarks to prevent extreme results (e.g. fewer than zero people having no qualifications).

The projections use 2021 as a baseline year, projecting Northern Ireland's skills profile to 2035.³⁷ In 2021, almost 12% of 25 – 64 year olds had no qualifications, 12.4% had qualifications below level 2 and 46.1% had qualifications at level 4 and above.

The projections show a strong upward shift towards higher education

The proportion of the population with high level qualifications (Level 4 and above) are predicted to rise from 46.1% in 2021 to 55.3% in 2035, almost a nine-percentage point increase. This signals a major uplift in high-skilled labour in Northern Ireland across all age groups.³⁸

There is a projected decline in lower-level qualifications

Simultaneously, the proportion of the population with low and medium-level qualifications is projected to decline.

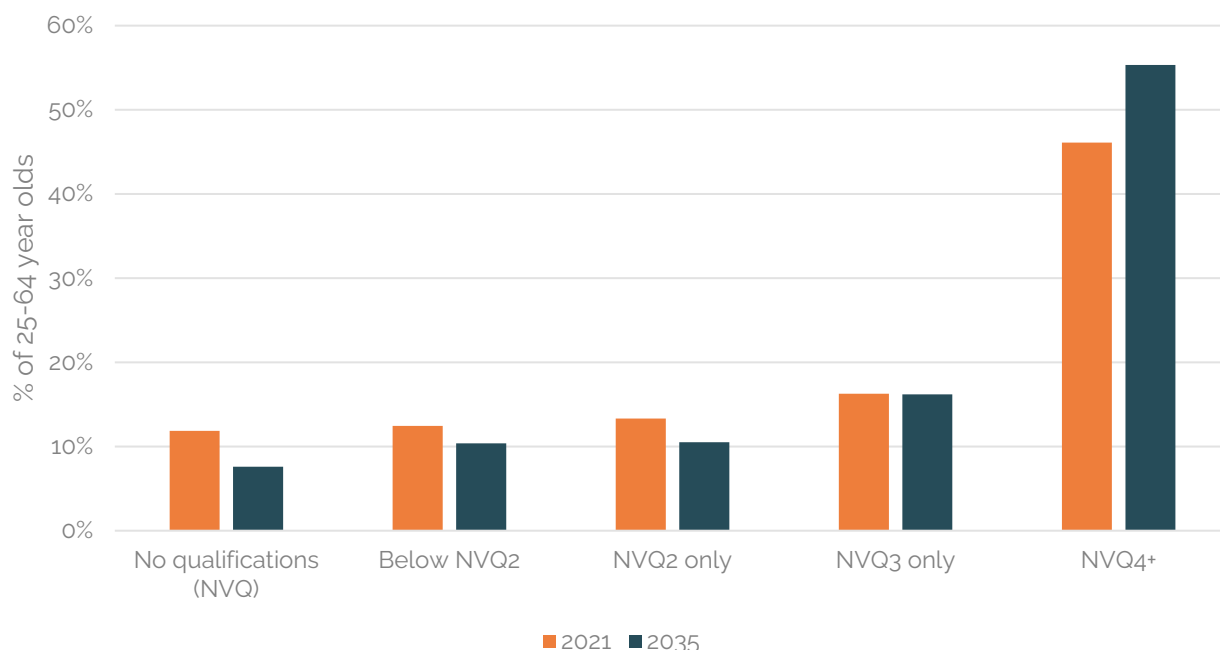
The proportion of people with no qualifications is projected to drop from 11.9% to 7.6%, and the proportion with below Level 2 qualifications to drop from 12.4% to 10.4%. When combined, these results indicate a projected 6.3 percentage point decline in the proportion of the population with low or no qualifications from 2021 to 2035.

Additionally, as the decline in lower-level qualifications is not as big as the increase in higher-level qualifications, the proportion of those with medium qualifications are also projected to see a decrease, albeit to a lesser extent. The percentage of the population with level 2 qualifications only is projected to decrease by 2.8 percentage points (13.3% to 10.5%), while the proportion with level 3 qualifications is projected to remain stable (dropping slightly from 16.3% to 16.2%).

³⁷ 2021 data was used as a baseline for consistency with our previous UK skills projections - Learning and Work Institute (2024) [The great skills divide: how learning inequalities risk holding the UK back](#)

³⁸ The NVQ4+ projections may have been slightly impacted by a post-covid bump in the proportion of the population with L4+ qualifications. However, based on comparisons between NI and UK data from 2020 onwards, this was not considered to impact the broad level of projections

Figure 1: Projected highest qualifications change 2021-2035



Source: ONS, L&W analysis

Northern Ireland and the rest of the UK

In order to better contextualise Northern Ireland's skill profile, we compare its projections to that of the UK overall, as well as to other UK nations and regions. In addition to comparison with London, Wales and Scotland, we have also included the qualification profile of the Liverpool City Region and Greater Manchester due to the similarity of their current qualification profile with Northern Ireland.

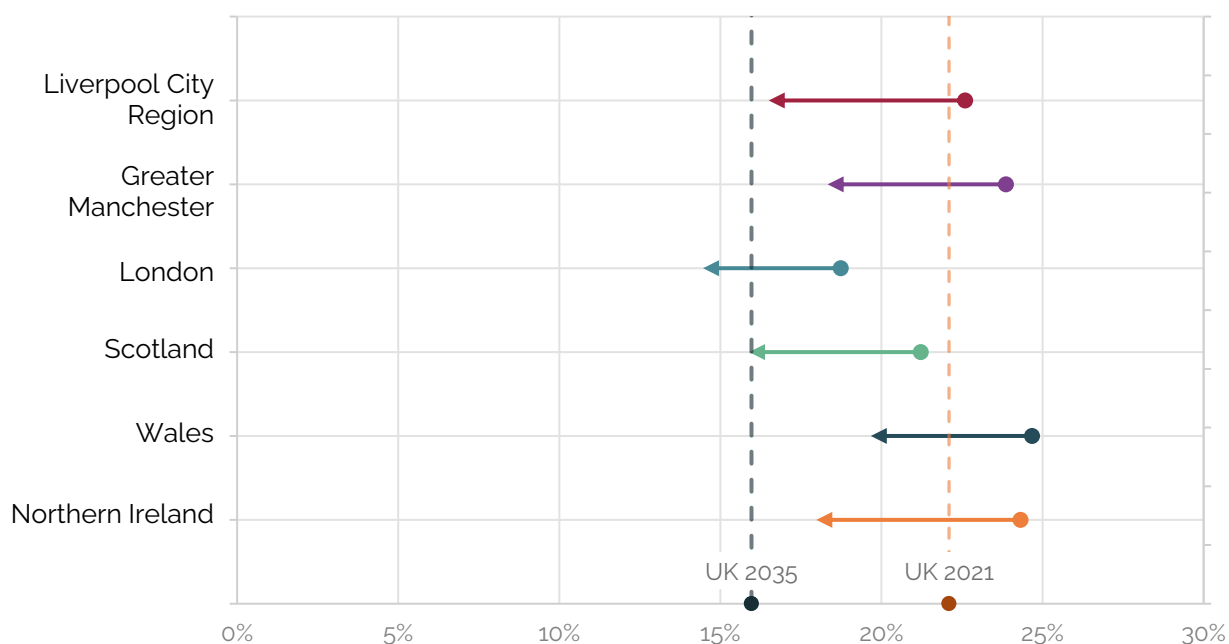
Northern Ireland holds steady in reducing low qualifications

Figure 2 depicts the change in the proportion of the population with low qualifications in Northern Ireland alongside other nations and key regions in the UK.

Northern Ireland's position relative to the UK average is projected to remain broadly unchanged. In 2021, it was two percentage points above the UK average for low qualifications (24% vs 22%), a gap expected to persist to 2035 (18% vs 16%) despite overall declines in both.

Liverpool City Region and Greater Manchester start from similar levels to Northern Ireland and are projected to follow comparable trajectories. Northern Ireland is forecast to see a six-percentage-point reduction between 2021 and 2035, similar to Scotland and London but from a lower baseline. Wales is also expected to follow a similar trend, though it is projected to remain around two percentage points behind Northern Ireland in 2035 (20% vs 18%).

Figure 2: 25–64-year-olds with low qualifications, 2022 and 2035, %



Source: ONS, L&W analysis

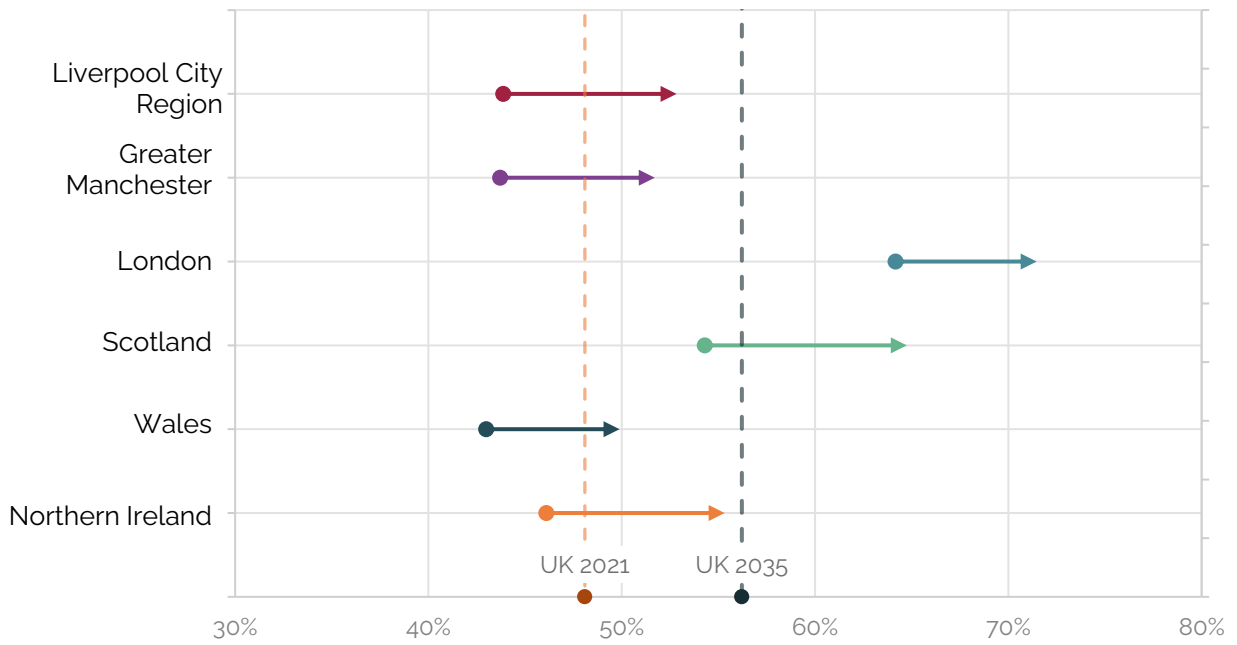
High qualifications grow strongly across all nations and regions – with Northern Ireland being one of the top performers

Figure 3 depicts the change in the proportion of the population with high qualifications in Northern Ireland alongside other key nations and regions in the UK.

As was the case with low qualifications, Northern Ireland's position relative to the UK average remains more or less the same. In 2021, Northern Ireland was two percentage points behind the UK average (46% vs 48%). This gap is projected to slightly lessen with an increase projected in both regions (to 55% vs 56% respectively) in 2035.

Out of the comparator nations and regions, Northern Ireland is projected to show a relatively strong increase in the share of the population who hold high-level qualifications (nine percentage points), with Scotland and Liverpool City Region showing similar increases (albeit from a higher starting point for Scotland). Northern Ireland is projected to show a bigger improvement than London (six percentage points), although London starts with a substantially bigger proportion of people with high qualifications.

Figure 3: 25-64 year olds with high qualifications, 2022 and 2035, %



Source: ONS, L&W analysis

International comparisons

Comparing qualifications across countries can be challenging. However, the OECD groups qualifications by level, allowing a comparison of high (level 4+ in Northern Ireland), medium (levels 2 and 3 in the Northern Ireland), and low (below level 2 in the Northern Ireland) qualifications.

It should be noted that comparisons are based on a 2022 baseline, rather than 2021 as per the Northern Ireland only analysis in the previous chapter.³⁹

Methodology

The International Standard Classification of Education (ISCED) data for 25- to 64-year-olds was used to project qualification profiles. This data classifies qualifications by level by country. The rate of change for 2012 to 2022 for low, intermediate and high qualifications was assumed to continue until 2035. As in the Northern Ireland projections, we set a ceiling of 65% for high qualifications and a floor of 5% for low qualifications to reflect potential natural limits in qualification attainment. This provides an indicative picture but does not account for potential policy and demographic change by country.

For Northern Ireland and the UK, ISCED data was used as a baseline and the rate of change calculated in each country's projections applied to this. As ISCED data is not available for Northern Ireland, UK ISCED data was used to approximate Northern Ireland data based on the difference between their Labour Force Survey skill profiles. UK data has been included for comparative purposes, but due to the different methodology required for international projections, the previous section should be referred to for detailed Northern Ireland/UK comparisons.

Northern Ireland's 2022 international profile

In 2022, Northern Ireland ranked 10th out of 38 countries in the OECD for higher qualifications, 33rd for medium qualifications, and 30th for low (see Figures 4-6). The particularly low ranking for medium qualifications partly results from the combination of a higher proportion of people with both high and low qualifications. Northern Ireland has:

- A higher proportion (20.4%) of people with low level qualifications than the EU (16.6%) and G7 (15.5%) averages and is roughly in line with the OECD average (19.8%). It starts at a similar baseline to the UK (18.6%) but has a substantially higher proportion of low level qualifications than the Republic of Ireland (12.4%).

³⁹ 2022 data was used as a baseline for consistency with our previous international projections for the UK - Learning and Work Institute (2024) [The great skills divide: how learning inequalities risk holding the UK back](#)

- A substantially lower proportion (29.9%) of people with medium level qualifications than the EU (45.7%), G7 (39.5%) and the OECD average (40.2%). It starts at a similar baseline to the UK (30.1%). It has a lower proportion than that of the Republic of Ireland (33.2%), although the Republic of Ireland is closer to Northern Ireland than to the OECD average.
- A higher proportion (49.2%) of people with high level qualifications than the EU (37.7%), G7 (45.0%) and the OECD average (40.4%). However, compared to the UK and the Republic of Ireland, Northern Ireland has a lower proportion of people with high level qualifications (51.3% and 54.4% respectively).

Countries with a smaller proportion of the population with low qualifications include Japan, Czechia, Slovak Republic, Poland, and Canada who have an average of 6.1% (14.3 percentage points lower than Northern Ireland). While Northern Ireland's low qualification rate is better than some Southern European countries, it is worse than top performers in Northern/Eastern Europe and some parts of Asia.

Countries with substantially higher medium qualification shares include Germany, Hungary, Poland, Slovak Republic and Czechia with an average of 60% (just over 30 percentage points greater than Northern Ireland). Northern Ireland's qualification distribution is characterised by an under-representation of a medium qualified population relative to most OECD countries.

Countries with larger high qualification shares include Australia, Korea, Ireland, Japan and Canada with an average of 55.5% (approximately six percentage points higher than Northern Ireland). Northern Ireland performs relatively strongly in terms of high-level qualifications compared with international benchmarks.

Figure 4: Low qualifications OECD, 2022

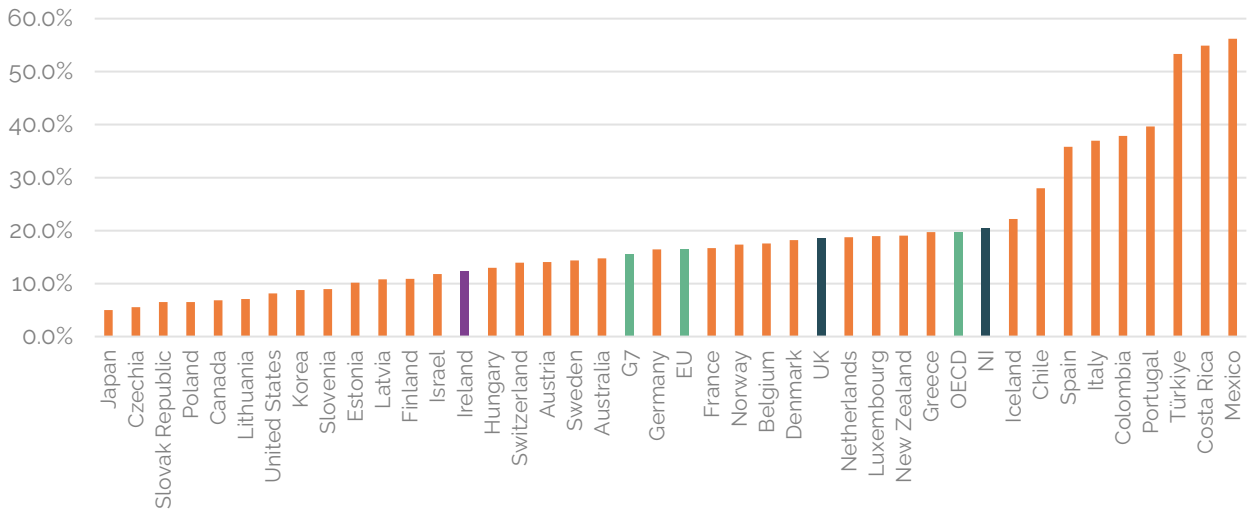


Figure 5: Medium qualifications OECD, 2022

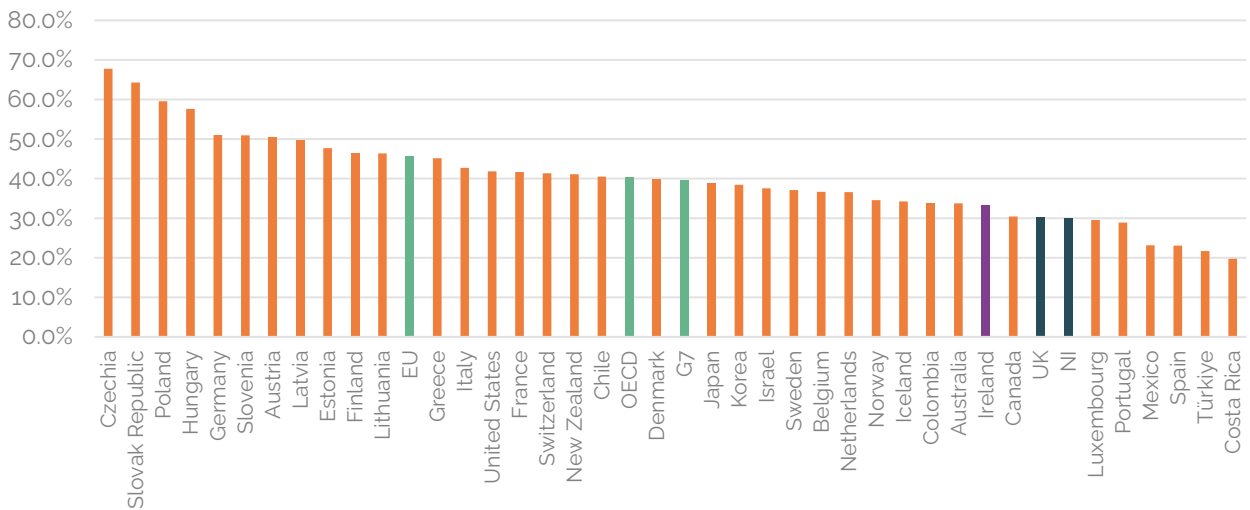
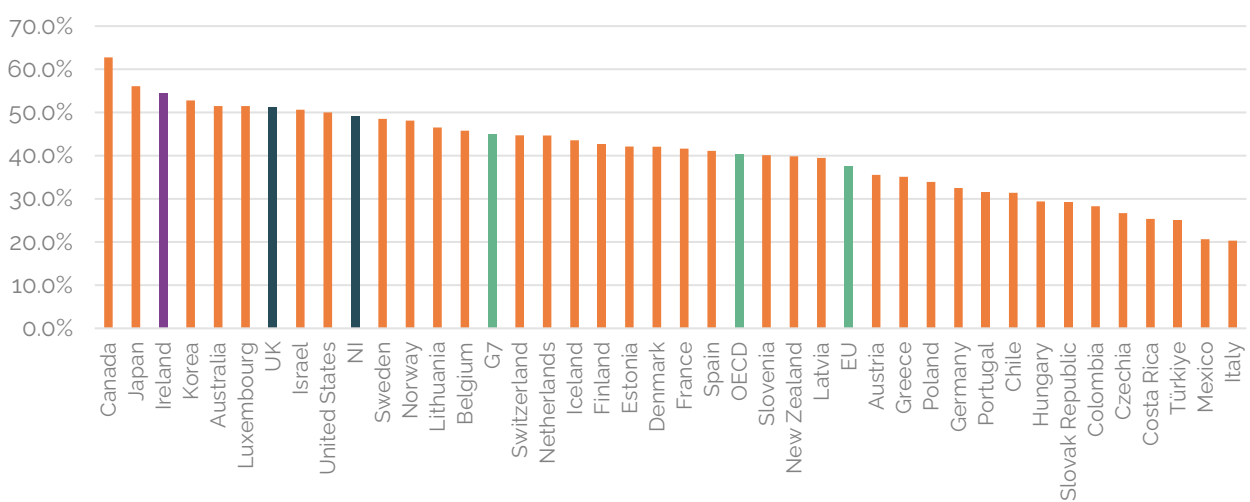


Figure 6: High qualifications OECD, 2022



Source: OECD, L&W analysis

Northern Ireland's projected 2035 international profile

The projections for 2035 suggest little to no improvement in Northern Ireland's relative position (Figures 7-9). It would remain 30th for low qualifications, 33rd for medium qualifications and fall from 10th to 12th for high qualifications.

By 2035, Northern Ireland would:

- Continue to have a higher proportion (15.1%) of people with low qualifications compared to the EU (11.8%), G7 (10.8%) and the OECD average (12.6%). It is projected to perform similarly internationally to the UK (13.4%), while continuing to lag behind it, but to fall further behind the Republic of Ireland which would be among the countries with the smallest proportion of low qualifications (5.0%).
- A substantially lower proportion (27.0%) of people with medium qualifications compared to the EU (38.4%), G7 (36.8%) and the OECD average (35.4%). It is projected to perform similarly internationally to the UK (28.1%), but to narrow the gap with the Republic of Ireland (30.0%)
- A higher proportion (59.0%) of people with high qualifications compared to the EU (49.8%), the G7 (52.6%) and the OECD average (50.4%). It is projected to perform similarly internationally to the UK (60.0%), which would also have a slight drop in the rankings, and remain lower than that of the Republic of Ireland (65.0%).

Projections for 2035 indicate that there is a substantial reduction in low qualifications and a slight narrowing of the gap with countries that currently have a much smaller level of low qualifications than Northern Ireland. While it is not an outlier internationally, it is not among the world leaders in reducing the proportion of low qualifications. Additionally, although the proportion of medium qualified individuals declines across all comparator countries, Northern Ireland continues to lag behind its peers, indicating a persisting gap in the middle-skilled workforce.

The projections indicate that Northern Ireland will continue to perform reasonably well internationally in terms of the proportion of high qualifications. However, this should be considered alongside the relatively high proportion of the population with low qualifications.

Figure 7: Low qualifications OECD, 2035

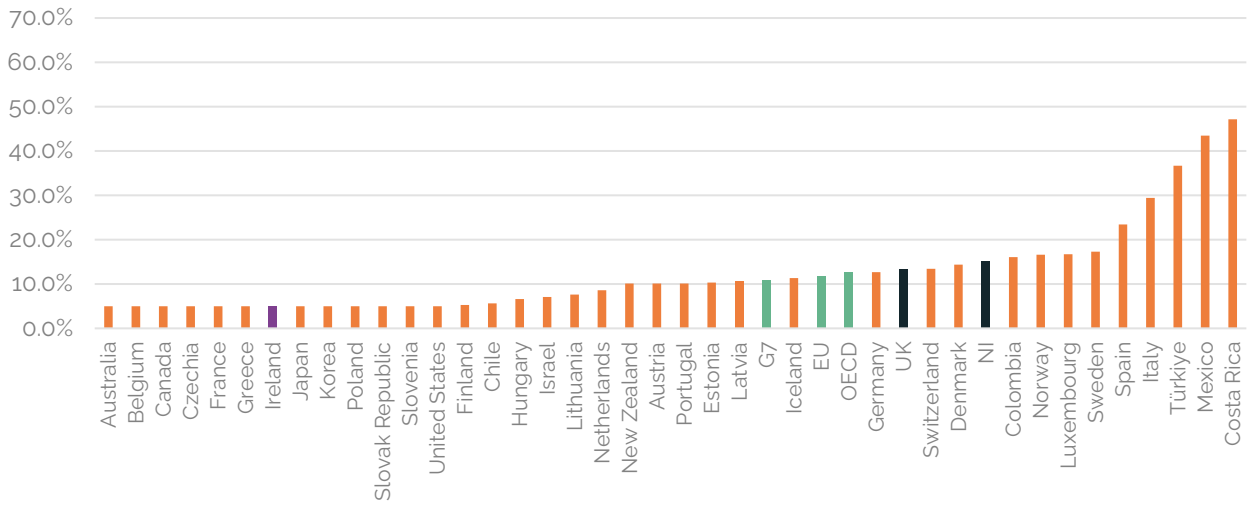


Figure 8: Medium qualifications OECD, 2035

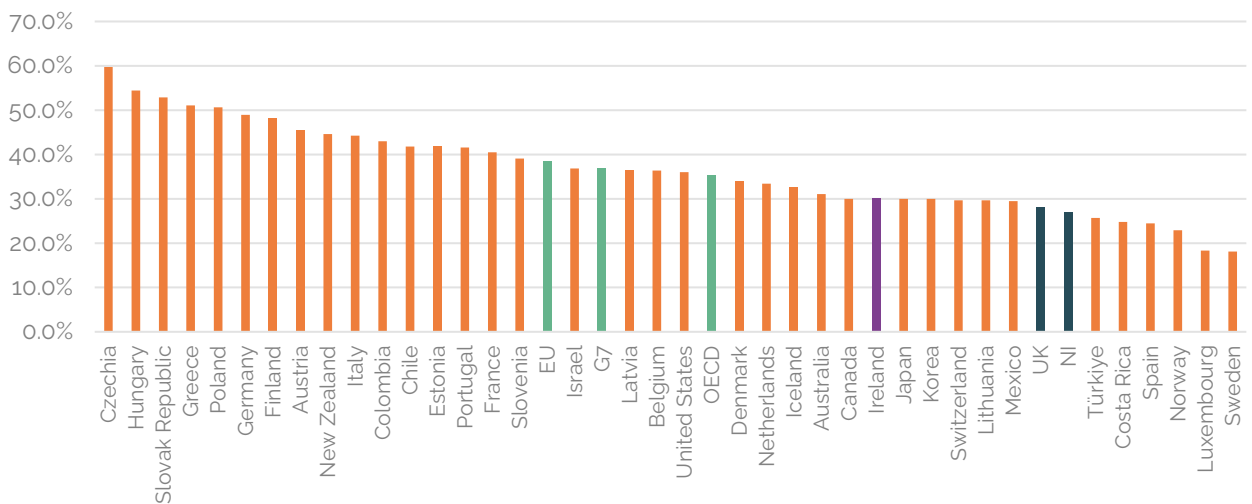
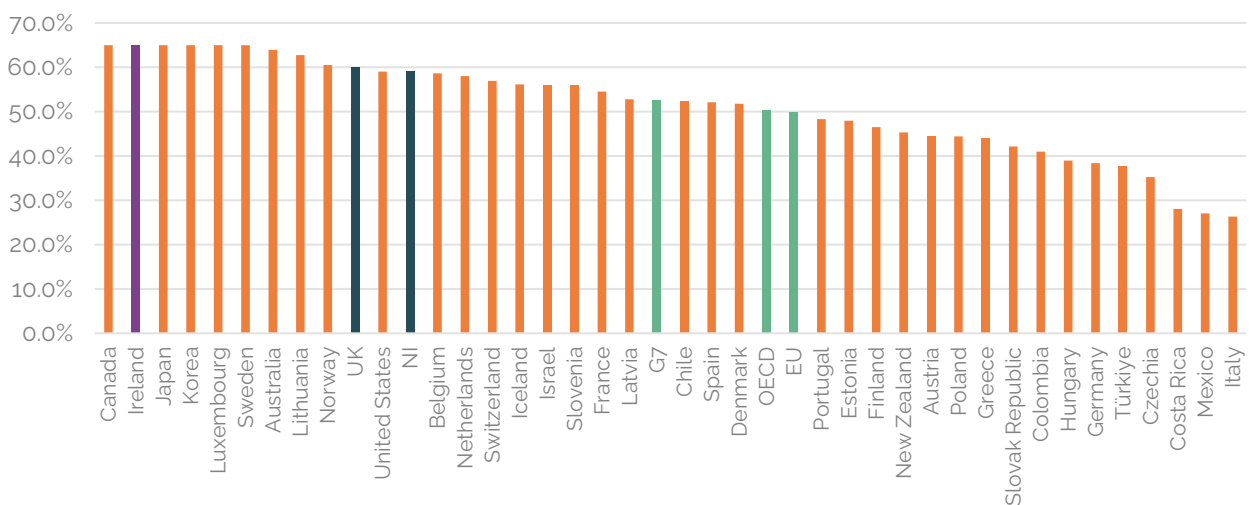


Figure 9: High qualifications OECD, 2035



Source: OECD, L&W analysis

Summary

Qualifications are a crucial determinant of economic performance, labour market resilience and long-term inclusivity. The composition and level of qualifications within the workforce influences productivity, earnings, investment and the ability of the economy to adapt to technological changes and shifting sectoral demand. An imbalance in the qualification profile, particularly one with a higher share of low qualifications, can limit progression pathways and limit productivity growth. Northern Ireland's qualification profile indicates that a growing proportion of the population has higher level qualifications. There is also a concurrent, projected decline in the proportion of the population with low qualifications. As individuals move from low to middle qualifications and middle to high qualifications, this will likely cause a decline in the proportion of middle level qualification holders as well.

Northern Ireland's qualification profile closely mirrors that of the UK, if slightly lagging it. However, when benchmarked against the wider set of OECD countries, Northern Ireland displays a distinct qualification mix, characterised by strengths at the upper end of the qualification distribution alongside persistent weaknesses in intermediate qualifications.

Northern Ireland is relatively strongly positioned in terms of high-level qualifications in 2022 and 2035, holding a ranking well above the OECD, EU and G7 average. However, its relative ranking is expected to decline slightly over time due to faster improvements in other countries.

By contrast, a key challenge for Northern Ireland is the relatively high proportion of the population with low qualification levels. Although its share of low qualifications is projected to fall by 2035, Northern Ireland is projected to remain in the upper half of countries in this measure, indicating slower progress compared to its peers. The persistence of a comparatively large low-qualified group highlights an ongoing challenge in improving baseline qualifications and reducing inequality in attainment. Northern Ireland has a comparatively smaller intermediate-skilled workforce with this gap expecting to persist to 2035 as well. The limited size of the medium qualified workforce may constrain progression pathways and the supply of technical and associate skills

Taking these comparisons together, Northern Ireland's projected improvements in overall qualification levels are being driven primarily by growth in the proportion of the population with high qualifications rather than the broad strengthening of intermediate qualifications or the rapid reduction in low qualifications. An increase in high level qualifications is good news, but without larger reductions in low level qualifications and increased mid-level qualifications, there is a risk of an increasingly uneven distribution which may impact economic growth, social inclusion and cohesion.

Recommendations

- 1. Aim for world-class learning and skills.** Northern Ireland's qualification profile continues to improve, but is projected to lag internationally in the high proportion of its workforce with low level qualifications, and the low proportion with medium level qualifications. To close this gap, there should be a renewed focus on supporting increased attainment for people at these levels. The Northern Ireland Executive should consider setting a target for 75% of adults to be qualified to level 3+, as set out for Wales in its 2050 [national milestones](#) and as we have [recommended for England](#) by 2035. Northern Ireland should also continue its progress in increasing the proportion of its workforce with higher level qualifications, and should encourage this through vocational routes for all age groups, alongside traditional higher education.
- 2. Whole government approach to skills.** Lifelong learning is of increasing importance in meeting long-term economic challenges such as an ageing population, rising prevalence of long-term health conditions and longer working lives. It can help to improve health and wellbeing, ensure people can upskill with a changing economy, build community cohesion and support wider government ambitions such as building more homes and transitioning to net zero. Over the past four years there has been a welcome increased skills policy focus in Northern Ireland. This focus should be maintained, and lifelong learning should be promoted through the development of an action plan. However, more work is needed on building a whole government approach to skills, with greater coordination between different departments and tiers of government. The eventual aim should be for lifelong learning to become a golden thread across all public services. After the recent rapid changes in skills policy, there is also need for a period of stability moving forward to give a chance for policy to bed in.
- 3. There should be greater investment in learning and skills.** Improvements can only be delivered if investment rises, but both government and employer investment in skills in Northern Ireland have fallen in recent years. Extra public investment is needed, which also needs to be matched by increased investment by employers in workforce training and by individuals in their own development.
- 4. Monitor progress.** Collection and analysis of detailed monitoring data is essential to keep track of progress and the effectiveness of skills provision. There should be greater focus on ensuring that data on programme participation and outcomes is collected and published, with explicit linking to [the wider skills strategy wider policy objectives](#). To support this, the Northern

Ireland Executive could review models for publishing data used in the other parts of the UK and internationally.

5. **There should be greater skills policy cooperation** with the Republic of Ireland and with the other nations and regions of the UK, to learn from existing good practice in promoting lifelong learning and skills development, and in how government and third-sector organisations can more effectively work together to tackle skill inequalities.