

# DfE Economic Commentary

Winter 2017/18

Since our last edition, the NI economy has continued to post increases in key indicators, although growth has slowed more recently. The main sectors of the economy posted mixed results but goods and services exported from Northern Ireland continue to be in demand. The latest labour market statistics show falls in both unemployment and employment, coupled with a rise in inactivity.

## Overview

The Economic Commentary reviews each of the key elements that contribute to economic growth:

### The Economy

Over the medium term the economy has recorded solid growth in output and jobs, which has been robustly underpinned by the private sector. However, recent output and employment statistics point to a slowing of growth.

### Business

The construction and services sector saw an annual rise in growth but manufacturing reported a decline in output. Turnover by non-financial businesses in NI rose to almost £70bn in 2016.

### Rest of World

The latest BESES figures show that our goods and services exports continue to be in demand, growing by over 7% in 2016. The tourism sector continues to grow, with visitors spending over £900m locally.

### Households

The labour market continues to post mixed results with both the unemployment and employment rate falling and economic inactivity rising. Inflation has risen steadily over the year to its highest rate (3.1%) since March 2012 and well above the Bank of England 2% target.

### Government

While generally on a downward trend over the past eight years, public sector jobs have risen slightly over the latest year. The NICS again registered a fall in employment numbers.

## Research Highlights

- The World Economic Forum (WEF) has published **The Global Competitiveness Report 2017-18**, identifying Switzerland as the most globally competitive country.
- The Legatum Institute published its **Prosperity Index 2017**, highlighting that global prosperity now sits at its highest level since the Index was first published in 2007.
- The Office for National Statistics published its latest bulletin on **Personal Well Being** in the UK, highlighting that Northern Ireland reported the highest levels of personal well-being when compared with the UK average.
- The Global Entrepreneurship Monitor published its **UK 2016 Monitoring Report**, highlighting that Total early-stage Entrepreneurial Activity (TEA) in Northern Ireland was 6.3%, significantly lower than in England (9.2%) and the UK average (8.8%).
- NESTA published an **update** on its **Prototype Skills Map**, which identified the skill that has shown the fastest growth in demand from employers between 2012-14 and 2014-16 was in the area of big data.

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# The Economy

The local economy has continued to experience growth in both output and jobs, although this has been slowing in recent times. The private sector continues to take the lead on both measures, having grown by almost 5% and added over 67,000 jobs to the local economy since the start of 2012.

<b>-1.0%</b> <small>quarterly change in economic activity</small>	<b>+1.7%</b> <small>annual change in economic activity</small>	<b>+2,460</b> <small>quarterly change in employee jobs</small>	<b>+11,600</b> <small>annual change in employee jobs</small>	<b>1.1%</b> <small>GVA growth in 'real' terms</small>
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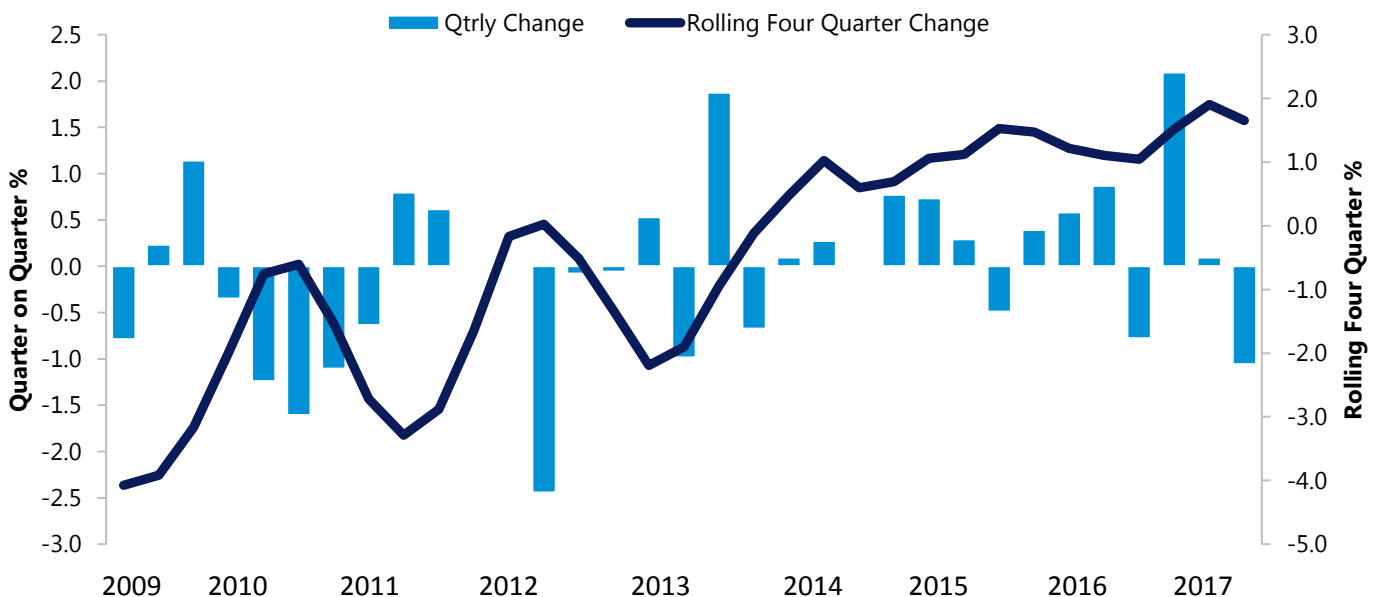
## Economic Activity

According to the latest results from the Northern Ireland Composite Economic Index (NICEI), local economic activity has decreased by 1.0% in Q2 2017 compared to the previous quarter, driven largely by a 1.2% decline in private sector activity. However, NI economic activity is estimated to have increased by 1.7% over the year on a rolling four quarter basis with growth in the private sector more than offsetting the decline in the public sector index. This overall increase was a combination of improvements in both the Construction and Services sectors and minimal growth in the Production sector.

Annualised average growth over the last four quarters (1.7%) was higher than the annual increase over the previous two year period (1.1%), indicating some evidence that the NI growth rate has improved over the medium/longer term. Despite this positive performance, the NICEI is currently 6.1% below its Q4 2006 peak.

While the measures are not produced on a fully equivalent basis, the annual average growth rate in UK GDP for the four quarters to Q2 2017 is the same as the NI growth rate (both 1.7%) over the same period.

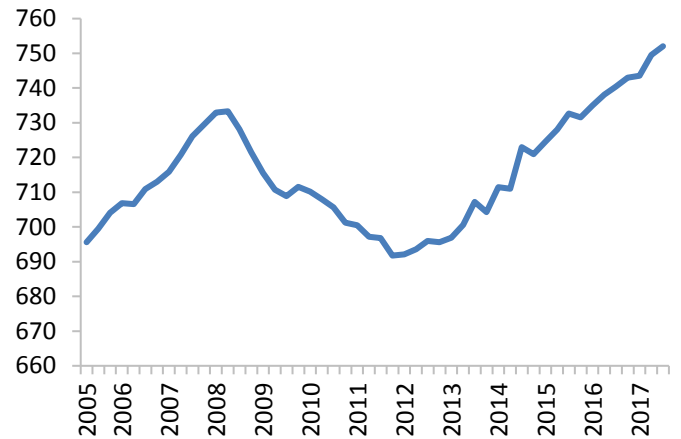
Figure 1 - NI Composite Economic Index



## Employee Jobs

The latest figures from NISRA show that the number of employee jobs in the local economy over the quarter and the year increased to a series high of 752,040 in September 2017. Whilst there have been quarter on quarter increases since December 2015, growth in employee jobs has been slowing since June 2016. Nonetheless, the latest estimates show that quarterly employee jobs have been above their pre-downturn peak for seven consecutive quarters since March 2016. Increases over the year were experienced in the manufacturing, construction and services sectors, with the total increase in employee jobs over the year (11,600 jobs or 1.6%) driven by the services sector, which accounted for the majority of growth (71%).

Figure 2 - Employee Jobs (000's)



## Private Sector

Over the latest year, jobs growth has continued to be led by the private sector, with increases over both the quarter and the year to its highest level since records began 1974. Since the low point in total employee jobs in the first quarter of 2012, the private sector has expanded by over 67,000 jobs.

The private sector is also leading in terms of activity, with output up by 0.7% compared to Q2 2016 and a rolling annual average growth in the sector of 2.6% to Q2 2017.

Meanwhile, the latest Ulster Bank PMI survey for November 2017 shows business activity in Northern Ireland's private sector continuing to rise solidly, with output having now risen in each of the past 14 months. The survey also noted that companies remain optimistic that output will rise over the coming 12 months.

Figure 3 - Economic Activity (four quarters to Q2 2017)

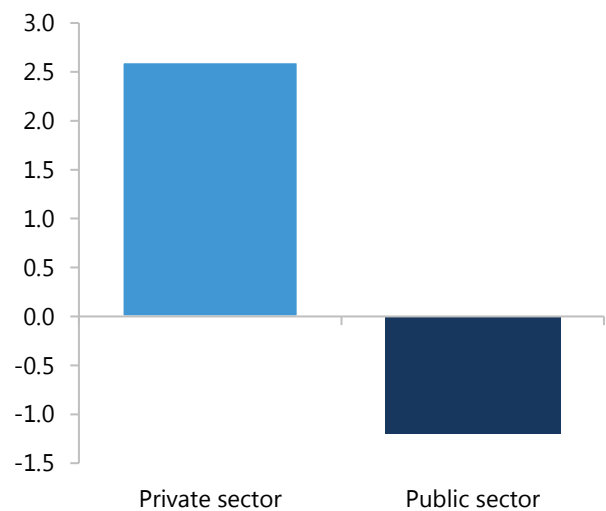
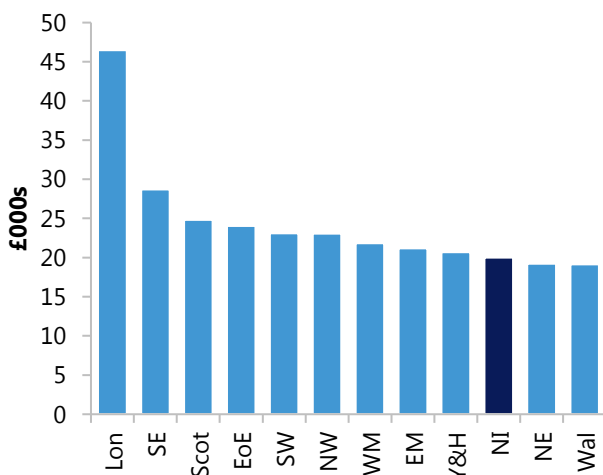


Figure 4 - GVA Per Head 2016



## GVA

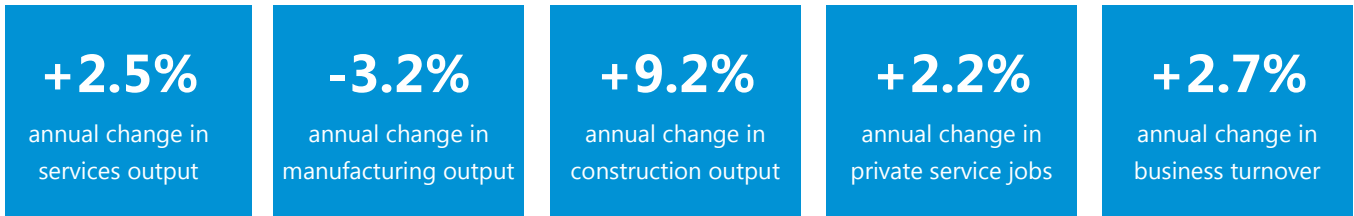
In December 2017, ONS released a "balanced estimate" of regional Gross Value Added (GVA(B)), which "balances" the income and production approaches to measure the economy into a single estimate at a regional level.

The latest figures show that, in 2016 NI GVA(B) was estimated to be worth just over £37bn, up by 1.1% in 'real' terms on 2015. GVA per head grew by 2.8% to almost £20,000. NI is tenth out of the twelve UK regions and remains at just over three quarters of the UK average estimate.

The sectors that contributed the most in terms of GVA were manufacturing and wholesale and retail trade, which accounted for 14.4% and 13.9% respectively.

# Businesses

Over the year the construction sector recorded significant growth in output to its highest level in five years. The services sector also reported solid growth while the manufacturing sector saw a fall in output. The services sector has driven employment growth over the past five years.

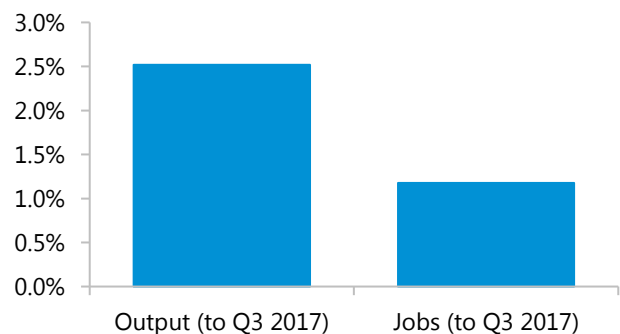


## Services

Services sector output grew over the last quarter by 1.0% and over the year by 2.5% in real terms. The index has now recovered by 9.0% since the recent minimum value recorded in Q2 2012 but remains almost 5% below the peak output level recorded in Q4 2006.

The services sector grew by just over 1,700 jobs, reaching its recent peak (+0.3%) over the quarter to September 2017 and recorded jobs growth of 1.4% over the year. Over the last five years, services sector output has increased by 8.0% and contributed almost 43,000 jobs to the NI economy.

Figure 4 - Rolling four quarter change in Services output and jobs



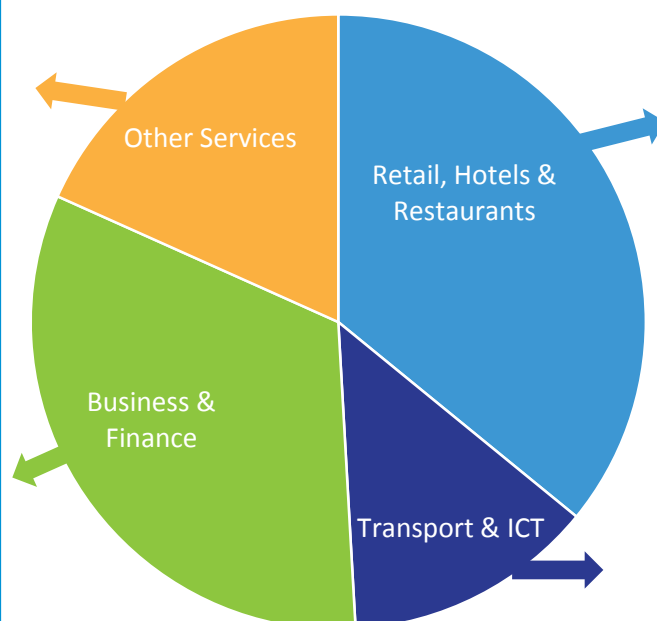
### Other services

Output increased by 3.8% over the latest year and employment grew by almost 400 jobs, largely driven once again by the Sports & Recreation sub-sector.

### Business and Finance

Output rose by 3.6% over the year. The sub sector saw jobs growth of over 6,300 over the period with Landscaping and Building services making the largest contribution to jobs growth.

Figure 5 - Relative Size of private services



### Retail, Hotel & Restaurants

Output increased by 1.2% over the year but employee jobs fell by almost 2,000. This was driven by a large fall in Retail jobs, partially offset by employment growth in Food Service activities.

### Transport and ICT

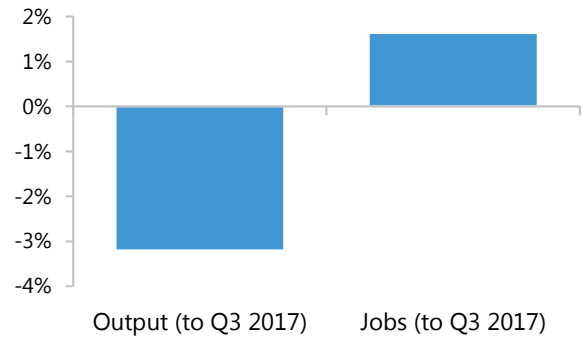
This sub sector reported the largest relative increase in output with annual growth of 5.7%. Sectoral employment increased by over 3,000 jobs driven largely by increases in the Computer programming sub sector.

## Manufacturing

Provisional results for Q3 2017 showed that manufacturing output fell by 3.6% over the quarter and by 6.5% over the year. Despite this recent fall, output remains 6.9% above its low point in Q3 2009. In the latest quarter four of six manufacturing subsectors saw a decrease in their output, with the Food, Beverages and Tobacco sub sector recording a substantial decline (-18.1%).

In terms of jobs, the sector grew by almost 2%, adding 1,540 jobs over the last year and bringing the total number of jobs in the sector to 84,120.

Figure 6 - Rolling four quarter change in manufacturing output and jobs

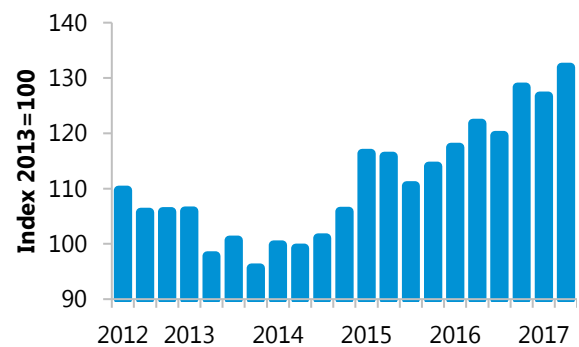


## Construction

The latest Northern Ireland Construction Bulletin shows that the total volume of construction output in Q2 2017 is at its highest level in five years, having increased by 4.1% compared with Q1 2017 and by 8.3% compared to the same quarter in 2016. This follows the general upward trend in construction output seen since late 2014.

Over the latest quarter, employment in the Construction sector is estimated to have contracted by 0.6% (200 jobs) however over the year employee jobs have expanded by 6.7% (around 2,100 jobs). Furthermore, the sector has added over 4,600 jobs since the low point in December 2014.

Figure 7 - Volume of Construction Output in NI



## Annual Business Inquiry

The latest figures from the Annual Business Inquiry show that turnover (the value of total sales and work by non-financial businesses in NI) was estimated to be worth £68,881 million in 2016; an increase of 2.7% compared to 2015.

This translated to £21,540 million in terms of approximate Gross Value Added (aGVA), up by 5.4% (£1,108 million) over the year, with growth driven by the production sector (increasing by over £400m between 2015 and 2016).

A number of positive announcements have been made recently regarding the provision of Invest NI support to local businesses, some of which are highlighted below:

Table 2 – Selected Indigenous Investments

January – December 2017	Assistance Offered	Jobs
Neueda	£2.3m	165
Global Equipment Spares	£396k	61
Woodland	£472k	57

## Other Business Surveys

Some key points from independent surveys monitored by the Department are included below:

### Ulster Bank PMI

- Results over the past number of months have generally shown solid growth in the local private sector despite ongoing inflationary pressures.

### InterTradeIreland Quarterly Business Monitor

- Results from Q3 2017 indicate that 96% of businesses in NI and RoI were stable or growing. Around two in five exporters have reported that EU Exit is having a negative impact on business but less than 10% have made plans to deal with potential outcomes.

### NI Chamber Quarterly Economic Survey

- Results from the latest Survey showed continued growth with almost all key balances remaining positive during Q3 2017. However, there were some signs of growth softening despite export markets showing a positive performance.

# Engagement with the Rest of the World

Local performance remains robust with the total value of external sales and exports of goods and services increasing to markets outside Northern Ireland. As the tourism sector grows, the local economy continues to benefit from increased visitor expenditure.



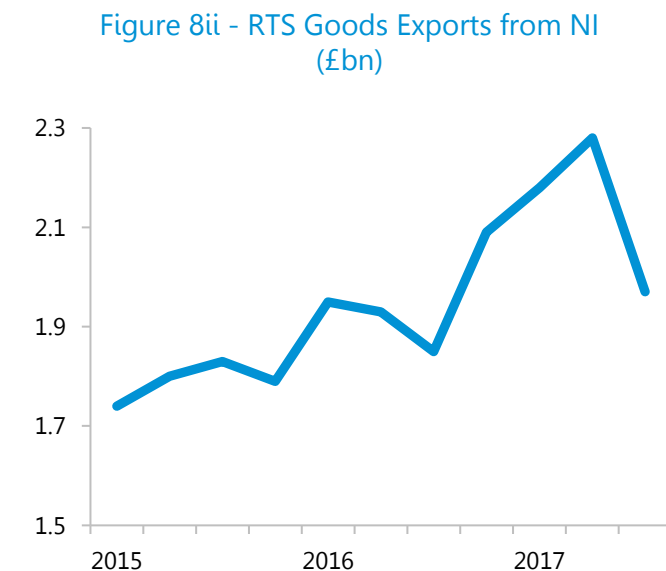
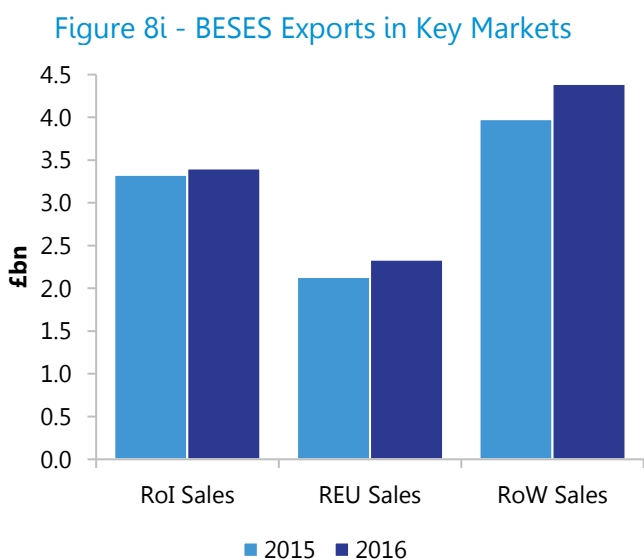
## Exports

The latest Broad Economy Sales and Exports Statistics (BESES) from NISRA provides a comprehensive measure of local businesses' sales of both goods and services to markets outside Northern Ireland. Results from the latest BESES cover the period up to 2016 and include sales within NI, sales outside NI but including GB (classed as external sales) and sales made outside the UK (defined as exports).

The total value of external sales in 2016 was £24.1bn, an increase of 4.2% over the year. Sales to GB have grown by 2.0% to £14.0bn over the year and exports for the same period were also up by 7.3% to £10.1bn. Exports to the RoI increased by 2.2% to £3.4bn, while exports to the Rest of the EU (excluding RoI) rose by 9.4% to £2.3bn and to the Rest of the World by 10.4% to £4.4bn.

The latest HMRC Regional Trade Statistics (which cover goods only), show that NI exports fell by almost 14% to £1.97bn over the third quarter of 2017 but increased by over 13% on a rolling annual basis. All other UK countries (including all regions in England) saw an increase in exports over the year. Scotland saw an increase of 20%, Wales 19% and England 14%.

The Republic of Ireland remains Northern Ireland's largest trading partner accounting for over a third of NI exports. Exports to the RoI declined by 1.0% in Q3 2017 but increased over the year by 16.3%. Compared to the same quarter a year previously, the markets where we have seen the largest value increases for NI exports are the RoI (up £93.5 million), Canada (up £28 million) and Thailand (up £25 million).



## Inward Investment

Invest NI has continued its role in providing support to businesses to help them grow and stimulate further investment in the economy.

This year Invest NI attracted 22 new externally-owned investors, its highest number ever, promoting over 2,200 new jobs, well over its target of 1,000 new first-time investor jobs.

Most recently, in December 2017, Invest NI welcomed US technology firm Cayan's reinvestment in Northern Ireland, creating 170 jobs and generating over £3.2m in annual salaries.

Invest NI also worked with Canadian-owned McCloskey International, who completed a £17million investment in Tyrone, building a new manufacturing facility. This secured 117 jobs over the last three years, doubling the company's workforce and generating almost £2.6m annually in additional salaries.

Reward is establishing a new software engineering team in Belfast, creating up to 60 new jobs over the next three years and delivering over £2.1m per year in salaries into the economy.

Over the year a number of locally owned businesses have also worked with Invest NI.

Strabane-based Fabplus is planning to expand and recruit 83 additional staff as part of a £7million investment. Technology firm MetaCompliance is tripling its workforce by recruiting 69 new jobs over the next three years to help develop its worldwide sales and market presence. Woodland, a manufacturing company, is creating 57 jobs as part of its plans aimed at doubling its turnover. These 57 new jobs are expected to generate over £1.1m annually in additional salaries in the local economy.

Table 3 – Selected Inward Investments

July – December 2018	Assistance	Investment	Jobs
Cayan	£624k	£4.9m	170
McCloskey International	£1.8m	£17m	117
Reward	£567k	£2.9m	60

## Tourism

In the year to June 2017 there were 4.8 million domestic and external overnight trips in NI, generating £907m visitor spend. Furthermore, the latest air passenger flow statistics reveal evidence of continued growth at NI airports. In total there were almost 8.5 million air passengers flowing through local airports in the year to June 2017, which now exceeds the peak reached in 2008.

Figure 9 - NI Trips and Expenditure (Over the year to June)

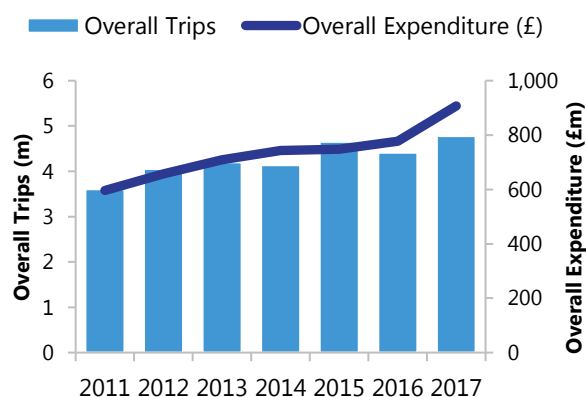


Table 4 – Key Market Growth Forecasts (OECD)

GDP	2018	2019
UK	1.2%	1.1%
Eurozone	2.1%	1.9%
US	2.5%	2.1%
Canada	2.1%	1.9%
China	6.6%	6.4%

## Key Markets Outlook

The latest Global Economic Outlook from the OECD notes that the world economy has strengthened, with monetary and fiscal stimuli underpinning a broad improvement in growth rates across most countries. The organisation expects global growth of 3.6% this year and 3.7% in 2018, representing modest upward revisions from previous estimates. While the OECD indicates a positive short-term outlook, weaknesses and vulnerabilities remain. Improved investment intention and business confidence are positive signs, however, projected investment rates remain too low to sustain acceleration of activity in the longer term.

# Households

The local labour market continues to show a mixed picture with falls in unemployment and benefit claimants over the year, with the unemployment rate now at its lowest level since 2007. However, there has also been a decrease in employment coupled with an increase in economic inactivity. In addition, price inflation has increased and remains above the Bank of England target of 2.0%.



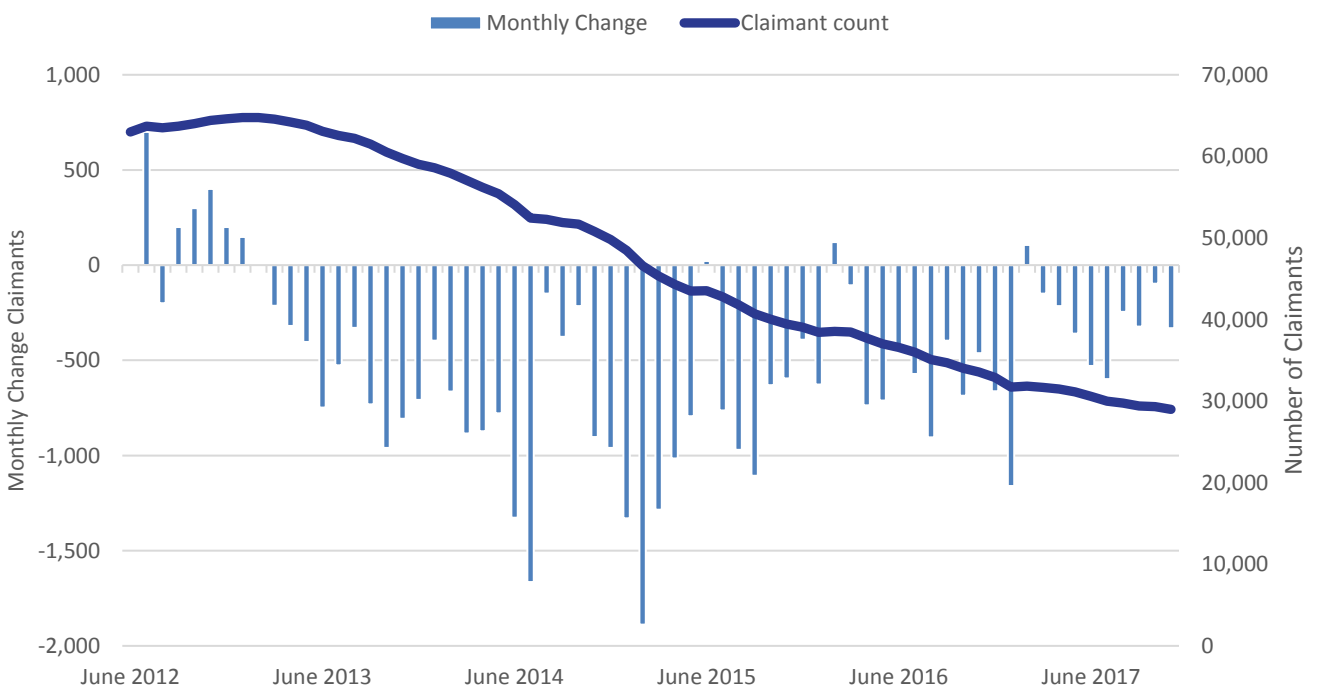
## Unemployment

The number of people claiming unemployment benefits has fallen in almost every month since its peak in February 2013, increasing in just three months when it rose marginally (by less than 250 in total). Over the past year the claimant count tally has fallen by 4,500, however the annual rate of decrease has been slowing since 2014. The claimant count remains over 20% higher than its low in September 2007 but in this regard there are reasons to remain positive. For instance, youth claimants have fallen by 21.7% over the year and long term claimants have fallen by 19.2% over the same period.

The LFS unemployment rate for the August-October 2017 period was 3.9%. The LFS rate has been trending downwards following its peak in November-January 2013 (when the rate was 8.3%). The equivalent UK rate decreased over the quarter and the year to 4.3%. This is the first quarter since May-July 2013 that the NI unemployment rate has been below the UK. The NI unemployment rate was below the European Union rate (7.5%) and Republic of Ireland rate (6.1%) for September 2017

The long term unemployment rate (percentage of unemployed who have been unemployed for 1 year or more) was up 4.2pps over the year and at 48.0% remains markedly higher than the UK average rate of 25.1%.

Figure 10 - Unemployment Benefit Claimants





## Employment and Activity

The number of persons in employment in the period August -October 2017 was estimated at 824,000, a decrease of 13,000 over the year. The overall employment rate currently sits at 68.1%, a decrease both over the last quarter (0.1pps) and the last year (1.3pps). Both the male and female employment rates decreased over the year by 1.0pps and 1.6pps respectively.

At 68.1% the NI employment rate remains below the UK average (75.1%) and the lowest of the twelve UK regions.

Figure 11 - Participation rates (annual percentage change)

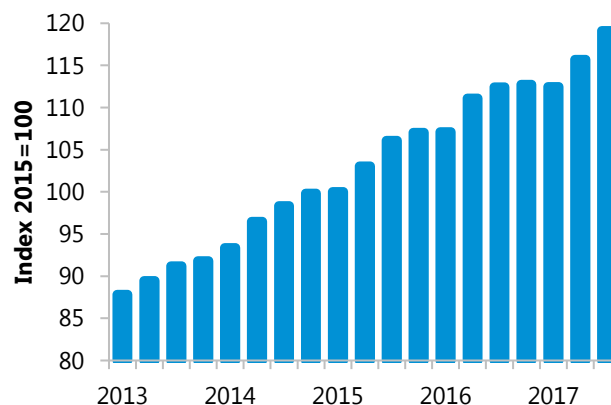


## Housing Market

According to the latest Northern Ireland House Price Index (HPI), house prices increased by 3.0% in Q3 2017 and by 6.0% compared to Q3 2016. The Index currently stands 35.7% higher than the low point in Q1 2013. All council areas in NI reported both quarterly and annual increases in house prices.

ONS estimates that UK house prices increased by 4.5% in the year to October 2017. All UK nations recorded growth in house prices with Northern Ireland recording the largest relative increase of 6.0%.

Figure 12 - House Prices in NI (Index)



## Consumer Spending

There have been mixed signals across some household indicators recently, as illustrated below:

### Spending Power

- The latest regional ASDA income tracker shows that family spending power in NI decreased by 1.8% year on year in the third quarter of 2017 but this is up from a 3.2% decrease in the previous quarter.
- NI has the lowest discretionary income in the UK (£100 per week). That said, NI was second behind London in terms of gross income growth (2.2%) in Q3 2017.

### Consumer confidence

- According to Danske Bank, consumer confidence fell by four points in Q3 2017 and two points over the year.
- Consumers' expectations of their financial position and how much they expect to spend on high value items has also deteriorated over the quarter.

### Tourism Spend

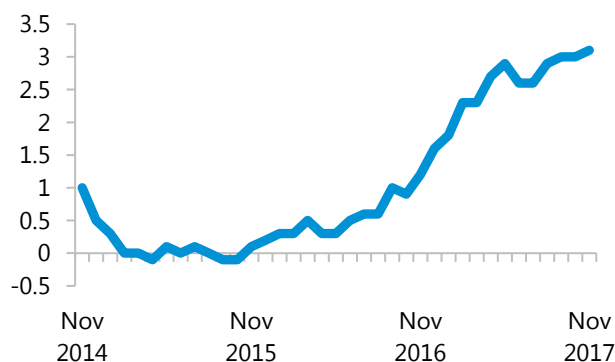
- In the year to June 2017, expenditure associated with all overnight trips was estimated at £907m, an increase of almost 17% on the previous four quarters.

## Prices

In November 2017 inflation increased by 0.1% to 3.1% the highest it's been since March 2012 and above the Bank of England (BoE) target of 2%, prompting a letter from the Governor of the BoE to the Chancellor.

The letter explained that two fifths of the increase was due to increases in food and energy prices. However, inflation is expected to fall towards the BoE's 2% target over the next 2 years.

Figure 13 - CPI Annual Inflation rate (%)



# Government

While jobs within the local public sector have generally been trending downwards over the past eight years, more recent figures show a slight rise in public sector employment, with the rate of expansion matching that in the UK over the year. The Northern Ireland Civil Service has continued to experience a fall in jobs over the year.

<b>+859</b> annual change in number of public sector jobs	<b>+0.4%</b> annual change in number of public sector jobs	<b>-1.5%</b> annual change in NICS jobs	<b>+2.1%</b> annual jobs change in local government	<b>+1.3%</b> annual jobs change in NHS Trusts
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## Jobs

Jobs within the local public sector have broadly been trending downwards since September 2009 with the sector now almost 10% smaller and with approximately 22,000 fewer jobs. In contrast, the private sector has grown by over 13% and by almost 64,000 jobs with most of these being within the services sector.

Over the same time period the UK public sector has contracted at a faster pace than Northern Ireland, falling by almost 15%.

However, more recently figures show a rise in public sector jobs, with both NI and UK public sector employment rising by 0.4% from Q3 2016 to Q3 2017.

Employment in local NHS Trusts rose by 1.3% while jobs in the NICS fell by 1.5%.

Table 5 – NI Selected Public Sector Jobs Breakdown

	Jobs Sept 17	Annual Change	
		No.	%
Total Public Sector Jobs	203,635	859	0.4%
NI Central Government*	106,058	365	0.3%
Northern Ireland Civil Service (NICS)	23,182	-349	-1.5%
UK Central Government	3,830	241	6.7%
Local Government	11,869	249	2.1%
NHS Trusts	69,683	924	1.3%

\*totals include NICS, Health and Education etc.

Figure 14 - NI Public Sector Jobs (000's)

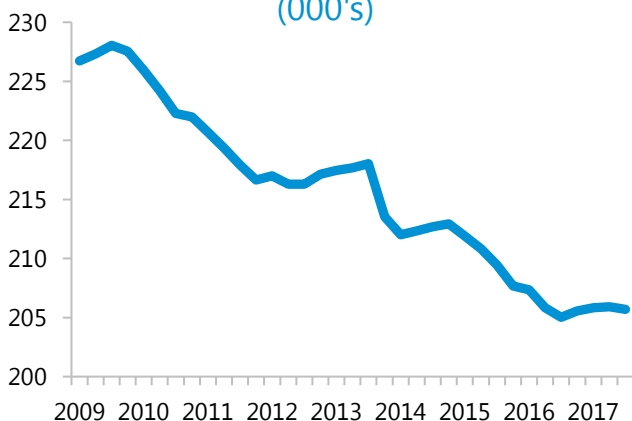
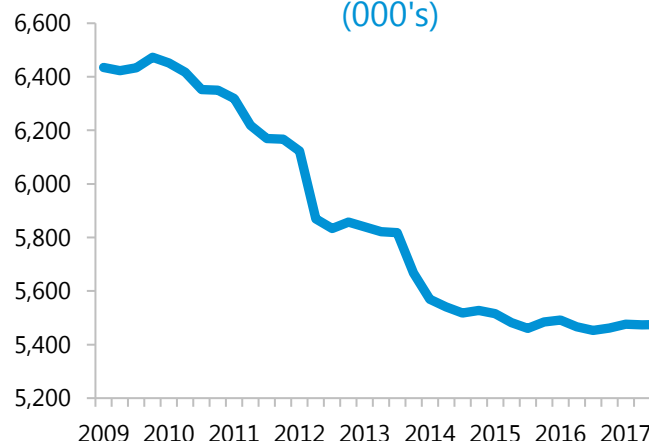


Figure 15 - UK Public Sector Jobs (000's)



# Research Highlights

This section highlights recent publications in key economic policy areas over the period June 2017 to December 2017 that will be of interest to readers. Links to each report (where available) can be found by clicking on the highlighted title.

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## Competitiveness

The World Economic Forum's [Global Competitiveness Report 2017-18](#) identified Switzerland as the most globally competitive country for the second year running, with six of the top ten countries listed from Europe. The UK (8<sup>th</sup>) dropped one spot (although this drop does not yet reflect the outcome of the EU Exit negotiations). RoI also fell one spot to 24<sup>th</sup> in this year's edition.

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## Entrepreneurship

The [Global Entrepreneurship Monitor](#) published its UK Monitoring Report for 2016 highlighting that Total early-stage Entrepreneurial Activity (TEA) in the UK in 2016 was 8.8%. This compares favourably to France (5.3%) and Germany (4.6%) but is lower than that of the US (12.6%). The gap with the US is due largely to differences in the nascent entrepreneurship rate rather than the new business owner rate. TEA rates in 2016 were similar across the home nations of England (9.2%), Wales (7.6%) and Scotland (7.3%). The rate in Northern Ireland at 6.3% was significantly lower than in England and the UK average.

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## EU Exit

A plethora of research reports continue to be released on EU Exit; two with specific reference to NI include the [paper](#) from the Nevin Economic Research Institute (NERI) and the [position paper](#) from the Department for Exiting the European Union (DExEU). The NERI paper looks at the impacts on trade of the UK leaving the Customs Union on the island of Ireland and navigating the various policy options available. The DExEU paper outlines the UK's intention to address the unique circumstances of NI and the RoI in aiming to uphold the Good Friday Agreement in all its parts; maintain the Common Travel Area and associated rights; avoid a hard border for the movement of goods; and preserve North-South East-West co-operation in all areas, including for energy.

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## Prosperity and Wellbeing

The [Legatum Prosperity Index](#) highlighted that world prosperity increased in 2017 and is now 2.6% higher than it was in 2007. However, the gap between the highest and lowest scores has increased for the fifth year, indicating that although prosperity may be increasing not all countries are benefitting from the increase. Elsewhere, the ONS bulletin on [Personal Wellbeing](#) in the UK reflected that people in Northern Ireland report the highest levels of personal wellbeing when compared with the UK average.

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## Tourism

Cut Tourism VAT has released a report [assessing the impact of a tourism VAT cut in NI](#). Over five years reducing the rate from 20% to 5% is estimated to result in 2,094 new jobs in the visitor accommodation and attractions sector alone.

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## Skills Gaps & Shortages

NESTA provided an [update](#) on its [prototype skills map](#), aiming to build a detailed picture of the latest skills demanded from online job adverts. The top ten skills demanded in 2014-16 were: communication; organisational; planning; customer service; Microsoft Excel; business management; teamwork/collaboration; writing; detail-orientated; and sales.

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## Higher Education

[The Destinations of Leavers from Higher Education Longitudinal survey](#) was released by the Higher Education Statistics Agency. Amongst those graduates from 2012/13 from higher education providers in NI: 80.9% were in work; 6.3% were in further study; 6.6% were in work and further study; 1.8% were assumed to be unemployed; and 3.1% were unavailable for work.

# Notes and Sources

## Notes:

Statistical publications often refer to an annual change when referring to the latest reference period compared with the same period one year earlier. However, results for individual quarters are often highly volatile, and looking at changes just within this specific reference period across years can give a misleading picture as to what trend performance actually is. We generally prefer to look at the latest four quarters compared with the previous four quarters for many variables to give a better overview of actual trend performance, which is particularly relevant when looking at output/activity as this is what annual GDP/GVA relates to. For ease of reference we have used the term 'annual change' to represent a four quarter change for some indicators. However, for indicators such as job numbers, annual change continues to refer to the latest quarter compared to the same quarter one year earlier. To avoid confusion, our references to annual change may therefore differ from those in published statistics relating to:

- Economic activity
- Production output
- Services output
- Construction output
- Exports of goods
- Tourism statistics

## Sources:

Sources	
<b>The Economy</b>	NI Composite Economic Index (NISRA); Quarterly Employment Survey (NISRA); Regional Gross Value Added (Balanced) (ONS)
<b>Businesses</b>	Index of Services (NISRA); Index of Production (NISRA); NI Construction Bulletin (NISRA); Annual Business Inquiry (NISRA); Invest NI; Purchasing Managers Index (Ulster Bank); Business Monitor (InterTradeIreland); Quarterly Economic Survey (NI Chamber of Commerce and Industry)
<b>Engagement with the Rest of the World</b>	Regional Trade Statistics (HMRC); Broad Economy Sales and Exports Statistics (BESES); Invest NI; Tourism Statistics (NISRA); Air Passenger Flow Statistics (NISRA); Global Economic Outlook (OECD)
<b>Households</b>	Claimant Count (NISRA); Labour Force Survey (NISRA); NI Residential Property Price Index (NISRA); House Price Index (NISRA); Quarterly Employment Survey (NISRA); Income Tracker (ASDA); Tourism Statistics (NISRA); Consumer Confidence Index (Danske Bank); Consumer Prices Index (ONS)
<b>Government</b>	Quarterly Employment Survey (NISRA); Public Sector Employment (ONS)

## Contact:

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