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- inspire future talent,
- support IT professionals,
- increase digital capability.

Delivery on these strategic objectives is underpinned by employer engagement across the sector, authoritative research, a continually developing sector qualifications and learning strategy and effective strategic partnerships.

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An e-skills UK publication

For further information please contact:

e-skills UK
1 Castle Lane
London
SW1E 6DR
Tel: 020 7963 8920
Fax: 020 7592 9138
info@e-skills.com
www.e-skills.com
Proprietor: e-skills UK Sector Skills Council Ltd
Registered in England no. 4019051

The National Skills Academy for IT
1 Castle Lane
London
SW1E 6DR
Tel: 020 7963 0420
info@itskillsacademy.ac.uk
www.itskillsacademy.ac.uk
Proprietor: The National Skills Academy for IT
Registered in England no. 7223753

Registered office: Victoria House, 39 Winchester Street, Basingstoke, Hampshire RG21 7EQ
The National Skills Academy for IT is wholly owned by e-skills UK
The ICT Labour Market in Northern Ireland

Introduction

Welcome to the sixth ICT Snapshot, a dedicated source of information about ICT labour and skills in Northern Ireland. This publication presents the very latest labour market data available together with the results from a survey of 300 employers of ICT specialists in Northern Ireland undertaken in November 2013. A profile of respondents to the survey and of the sector as a whole can be found on page 7.

Industry data is weighted to reflect the business population and vacancies are weighted by employment to reflect the workforce. All the sources, definitions and terminology used in this summary can be found on pages 8 and 9.

Summary of Labour Market Indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Status</th>
<th>2009</th>
<th>2010</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
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<td>Companies recruiting over past 5 months</td>
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<td>▼</td>
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<td>▼</td>
<td>▼</td>
</tr>
<tr>
<td>Companies currently recruiting</td>
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<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
</tr>
<tr>
<td>Advertised demand (vacancies)</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
</tr>
<tr>
<td>Balance of business optimism</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
</tr>
<tr>
<td>Companies planning to recruit (next 6 months)</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
<td>▲</td>
</tr>
<tr>
<td>Anticipated recruitment difficulties</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
<td>▼</td>
</tr>
</tbody>
</table>

* Status refers to change in indicator in comparison to the previous Snapshot survey or dataset. Amber indicates a worsening and green an improvement in the labour market position.

Recent recruitment

Though a similar proportion of companies recruited an ICT professional over the last six months; those recruiting are doing so in greater volumes.

○ 27% of ICT companies have recruited ICT specialists over the past 6 months (28% in 2013).

○ New recruits numbered over 447 in the six month period, a 37% increase on the previous survey.

○ Advertised demand for ICT specialists averaged 360 vacancies each quarter in Northern Ireland throughout 2013, with permanent (-26%) and contractor (-9%) adverts both down on 2012 levels.

Current recruitment and skills requirements

Fewer companies have current vacancies; but those that do, have more.

○ Though just 13% (compared with 16% in 2013) of companies had current vacancies for ICT specialists, the number of vacancies being recruited for by firms had increased by 11%.

○ Developer roles comprise more than a third (36%) of advertised vacancies.

○ SQL, Microsoft, SQL Server, .NET, Java and C# are the most commonly sought technical skills.

Recruitment outlook

Almost half of all companies and 58% of ICT firms are expecting to recruit ICT specialists over the next six months.

○ 48% of businesses planning to recruit an ICT professional expect to hire into Software Development roles.

○ Planned recruitment equates to approximately 496 ICT specialists being taken on in the next six months, with ICT and large companies taking on the majority of people.

○ However, a quarter (26%) of companies predict recruitment problems in the near future. ICT companies (34%) are most likely to be affected.

Business outlook

Business optimism is positive, and at an all time high.

○ However, top concerns for businesses are:

    ○ The state of the global economy.

    ○ Change in corporation tax.

    ○ National/Government debt.

    ○ Despite these issues, an increasing proportion of all companies expected sales (70%) and turnover (72%) to increase over the course of 2014.

The NI ICT Snapshot provides robust labour market intelligence in Northern Ireland in order to generate an ongoing understanding of the current and future dynamics of the sector and to help ensure that employers will have access to the ICT skills they require. This publication and the full report will assist in advising on policy and activities on ICT skills in Northern Ireland ensuring that employers can attract and retain employees both now and in the future.

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**NI ICT Snapshot:**

**Current Recruitment**

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**Fig1. Employer recruitment activity (last six months)**

ICT staff are being taken on by recruiting firms in larger volumes...

27% of companies in Northern Ireland had recruited an ICT professional over the last 6 months (one percentage point less than the figure reported in the 2013 survey).

Though more than half (55%) of these companies had recruited just one ICT professional, the absolute number of ICT specialists taken on (447) was 37% more than that recorded in 2013. Thus, although a similar proportion of firms are recruiting; those that are, are doing so in greater volumes.

Regardless of sector, the proportion of companies who had recruited over the past six months is similar to results for 2013, namely 34% of ICT companies, 13% of non ICT businesses and 32% of large companies.

---

**Fig2. Change in advertised demand**

...but the number of job ads during the year has fallen...

Advertised demand for ICT specialists in Northern Ireland averaged 360 vacancies each quarter for 2013, a 19% decrease on 2012 numbers.

Looking at the permanent and contractor markets reveals although advertisements for permanent positions still account for the majority of adverts (56%), this majority has fallen by 5 percentage points since 2012 and their absolute number by 26%. By comparison adverts for contract staff have fallen by 9% over this time period.

Roles for developers made up 36% of advertised vacancies at the end of 2013. The most commonly sought after technical skills were SQL, Microsoft, SQL Server, .NET, Java and C#.

---

**Fig3. Employers with current vacancies**

...fewer companies have ICT vacancies; but those with vacancies have more of them.....

One in eight (13%) companies in Northern Ireland have at least one vacancy for an ICT professional. This represents a three percentage point decrease on figures from 2013.

However, at the time of the survey there were over 204 vacancies for ICT specialists in Northern Ireland. This 11% rise indicates that although fewer companies have vacancies for ICT specialists; those that do, have them in greater volumes when compared to previous years.

Perhaps as expected, ICT companies are more likely than non ICT companies to have current vacancies for ICT specialists though interestingly the same cannot be said for larger companies (12% with current ICT vacancies) when compared to small firms (17%) - a reverse to that seen in previous years.

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Turning to anticipated future recruitment, overall, almost half (48%) of companies expect to recruit ICT specialists over the next six months (for growth and replacement), rising to 58% of ICT companies. These proportions are in line with the noted significant increase, regardless of sector or size since 2012.

Overall, planned recruitment equates to 496 ICT specialists being taken on in the next six months. Almost half of businesses who are planning to recruit expect to recruit into Software development roles (48%). This is followed by Technical and PC support and Systems Design and Development (42%) and Systems Design & Development (37%). In the longer term, average employment growth for ICT specialists as a whole is forecast to be 1.8% per annum (almost double that of the average for NI employment) to 2022.

As was the case last year, the proportion of companies in Northern Ireland reporting it will be difficult to recruit ICT specialists over the next 12 months has increased.

26% of all companies believe it will be difficult or very difficult to recruit ICT specialists in Northern Ireland over the next 12 months. ICT firms are most affected with anticipated recruitment difficulties expected by more than a third (34%) of these companies.

Where employers identified difficulties, a lack of skills, qualifications and experience in applicants were each cited as the main reasons for anticipated recruitment difficulties.

Recruitment into ICT job roles in Northern Ireland is mainly focused on experienced hires with 43% of employers describing experienced ICT specialists as their preferred recruitment pool. This rises to more than half (52%) for larger companies.

This recruitment pool is followed by education where around one quarter (24%) choose young people starting their career after finishing school, college or university as their preferred recruitment pool.

Of those companies who prefer to recruit from education, the preference is for IT / Computing graduates (44%), followed by IT/Computing Post graduates (17%) and non IT/Computing Post graduates (14%). Interestingly just 3% of employers whose preferred recruitment pool is those from education have a preference for Apprentices.

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NI ICT Snapshot: Business Outlook

Business outlook is positive and at an all time high...

Business outlook findings indicate levels of confidence amongst both ICT and non ICT companies to be at an all time high with the balance of optimism index increasing by +29 for all companies, +28 for ICT companies and +30 for non ICT companies.

59% of all companies say they are more optimistic than 3 months ago about the general business outlook in their particular sector (14 percentage points more than in 2013).

This level of confidence rises to 62% of ICT companies with just 6% of these firms (21% in 2013) stating they were less confident than in 2013.

...though concern remains on the state of the global economy...

The state of the global economy remains the top concern for employers in Northern Ireland, with 47% saying they are ‘very’ or ‘fairly concerned’ about it. This is followed by a change in corporation tax (44%) and Government debt/the national economy (42%).

Though generally speaking, ICT and non ICT firms have similar top concerns, the level of concern appears to be greater amongst ICT firms. For example 51% of ICT firms compared with 37% of non ICT firms are ‘fairly’ or ‘very concerned’ about the state of the global economy. Similarly, 46% of ICT firms compared to 34% of non ICT firms are ‘fairly’ or ‘very concerned’ about Government debt/the national economy.

...however, employers remain positive on key business indicators

The outlook for key business indicators is, as per 2013 results, very positive. More than three fifths of companies expected sales (70%) and turnover (72%) to increase over the course of the next year (results in 2013 were 65% and 64% respectively). In addition, smaller proportions of businesses expected costs (47% vs 55%) and competition (28% vs 35%) to increase compared to 2013.

The proportion of employers expecting sales and turnover to increase rises further for those in the ICT sector (73% and 78% respectively). In fact, a higher proportion of ICT firms, when compared to non ICT firms expected all business outlook indicators to increase - including costs and competition.

The most notable difference between the proportion of ICT and non ICT employers expecting increases is in the development of new products / services and training (both 22 percentage points).
Skills gaps continue to effect a quarter of firms...

Turning to the skills of the existing workforce, 25% of all companies in Northern Ireland report gaps between the skills in their ICT specialists and the skills needed by the business for these workers.

This proportion, around a quarter, is slightly higher amongst ICT (26%) rather than non ICT (23%) firms and where reported, affects more than three fifths (61%) of ICT specialists (7 percentage points more than in 2013).

Where businesses report skills gaps in their ICT staff, these are predominantly reported in Systems Design and Development roles, followed by Software Development and Information Management & Security.

...and they report technical skills need improving...

Firms report areas for skills improvement as being:
- Technical skills (74% of firms with skills gaps)
- Sector knowledge / experience (73%)
- Business skills (64%)
- Interpersonal skills (60%)
- Leadership (50%)
- Management (43%).

More than three fifths of companies with skills gaps (71%) state it is because ICT specialists have either not received or completed the appropriate training.

56% cite new systems being introduced, 53% new projects / products / services being launched and 42% state it is because they are unable to recruit staff with the required skills.

...with skills gaps detrimental to business performance.

88% of businesses with skills gaps report these gaps have a negative effect on the running of their business - for almost one in four (23%) this is a ‘major’ effect.

Skills gaps are most likely to cause an increase in workload for other staff and delays to new products or services. When looking specifically at ICT companies, the effect of skills gaps is greater and this is most noticeable in causing the loss of business or orders to competitors.

When asked about whether the incidence of skills gaps would increase, decrease or stay the same over the coming year, 11% (compared with 16% in 2013) felt they would increase. 15% felt they would decrease, with this figure rising to 18% of ICT companies compared with 9% of non ICT companies.

Small companies are notably more positive than their larger counterparts with 16% stating they expect the incidence of skills gaps to decrease (compared with just 6% of large companies).
NI ICT Snapshot
Sector Profile

Fig13. ICT businesses, 2013

<table>
<thead>
<tr>
<th>Classification*</th>
<th>Number of Companies (local units)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT Services</td>
<td>1,080</td>
</tr>
<tr>
<td>Telecoms Services</td>
<td>160</td>
</tr>
<tr>
<td>IT Manufacturing</td>
<td>25</td>
</tr>
<tr>
<td>Telecoms Manufacturing</td>
<td>10</td>
</tr>
<tr>
<td>IT Wholesale / Retail</td>
<td>150</td>
</tr>
<tr>
<td>Telecoms Wholesale / Retail</td>
<td>210</td>
</tr>
<tr>
<td>Total IT</td>
<td>1,255</td>
</tr>
<tr>
<td>Total Telecoms</td>
<td>380</td>
</tr>
</tbody>
</table>

Source: ONS, IDBR Number of local units in VAT and/or PAYE based enterprises in 2013
*See page 8 for full Standard Industrial Classification 2007 for the IT & Telecoms industry.

ICT workplaces comprise 2% of all businesses
The number of ICT businesses in Northern Ireland is relatively stable at 1,635 IT & Telecoms workplaces (1.9% of all businesses), consisting of:
- 1,255 IT company sites, 86% of which are in IT services. There are particular concentrations in ‘Computer programming activities’ numbering 460 sites.
- 380 Telecommunications sites, 42% of which are Telecoms services companies.

A smaller proportion of IT service companies in Northern Ireland are involved in ‘Computer Consultancy activities’ or ‘Other information technology and computed service activities’ than across the UK as a whole.

**Including leisure & entertainment software development and business & domestic software development.

Fig14. ICT industry job totals

Jobs in the ICT industry grow 6% in a year
The Quarterly Employment Survey shows that the total number of workforce jobs (all occupations) in the Computer programming and Telecoms industries in Northern Ireland grew by 6% over the last 12 months, growth only slightly more pronounced in Computer Programming (7%) compared with the Telecoms industry (6%).

Latest figures show a total of 3,160 employee jobs in the Telecoms industry and 9,640 in Computer Programming, Consultancy and related activities. The combined total of 12,800 is an increase of 16% on numbers in 2010.

Source: DETI, QES
*See page 8 for full Standard Industrial Classification 2007 for the IT & Telecoms industry.

Fig15. ICT workforce overview

Over 3% of Northern Ireland’s workforce are working in ICT
The total ICT workforce in Northern Ireland comprises 28,000 individuals - 3.49% of Northern Ireland’s current workforce.

This is made up of:
- 13,000 people in the ICT industry (38% of these are non ICT occupational roles).
- A further 15,000 working in ICT occupations in other industries.

In total, 23,000 people are working in ICT occupations in Northern Ireland.

Source: e-skills UK analysis of data from the ONS Labour Force Survey, four quarter average Q1-Q4 2013.
*Low sample, treat with caution

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The profile of survey respondents shows 300 responses including 201 from the ICT companies and 99 from non ICT companies.

Due to the relatively small number of small number of ICT businesses in Northern Ireland, the survey was opened up to other businesses employing ICT specialists, in other sectors with a traditionally strong ICT base such as financial services and the public sector.

This also allows for a more representative picture of the ICT recruitment and skills needs in Northern Ireland.

ICT businesses report that a quarter (25%) of their business activity related to Software Development and around one tenth for both Infrastructure Management (12%) and Application Management (11%)*.

The companies surveyed employ a total workforce of 44,134 in Northern Ireland.

Within that workforce the respondent companies employ 5,072 ICT specialists - 22% of the total professional ICT workforce in Northern Ireland (as above).

<table>
<thead>
<tr>
<th>ICT companies (by employee size-band)</th>
<th>Approximate Universe</th>
<th>2008</th>
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<th>2010</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
</tr>
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<tbody>
<tr>
<td>0-4</td>
<td>550</td>
<td>125</td>
<td>131</td>
<td>106</td>
<td>110</td>
<td>124</td>
<td>116</td>
</tr>
<tr>
<td>5-9</td>
<td>200</td>
<td>37</td>
<td>46</td>
<td>33</td>
<td>35</td>
<td>33</td>
<td>29</td>
</tr>
<tr>
<td>10-49</td>
<td>320</td>
<td>32</td>
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<td>12</td>
<td>8</td>
<td>18</td>
<td>12</td>
<td>16</td>
</tr>
<tr>
<td>ICT Totals</td>
<td>1100</td>
<td>207</td>
<td>226</td>
<td>184</td>
<td>203</td>
<td>200</td>
<td>201</td>
</tr>
<tr>
<td>Non ICT Totals</td>
<td>NA</td>
<td>93</td>
<td>80</td>
<td>120</td>
<td>97</td>
<td>100</td>
<td>99</td>
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<tr>
<td>Total interviews achieved</td>
<td>NA</td>
<td>300</td>
<td>306</td>
<td>304</td>
<td>300</td>
<td>300</td>
<td>300</td>
</tr>
</tbody>
</table>

Source: NI ICT Snapshot 2014 Survey Methodology

*data is weighted to reflect the business population

Source: NI ICT Snapshot survey 2014, respondent profile

Source: NI ICT Snapshot survey 2014, respondent profile (unweighted data)
The Northern Ireland ICT Snapshot employer survey was carried out by e-skills UK in November 2013. 300 employers of ICT specialists in Northern Ireland were interviewed by telephone. The survey sample was drawn from contacts who have previously participated, and also from Experian’s National Business Database.

Eligible employers in the ICT industry, the private sector and the public sector were contacted and the individual identified as holding responsibility for ICT recruitment and training within their place of work were interviewed. The data was then cleaned, edited, and weighted according to industry and size of company. A full methodology is available on request. The base of graphs is all companies except where specified otherwise.

The Standard Industrial Classification (SIC) 2007

The Standard Industrial Classification (SIC) is used for classifying business establishments and other statistical units by the type of economic activity in which they are engaged. The classification provides a framework for the collection, tabulation, presentation and analysis of data and its use promotes uniformity. Detailed SIC relating to the ICT industry itself are presented below.

**IT Services**
18.20/3 Reproduction of computer media, 58.2 Software Publishing, 62 Computer programming, consultancy and related activities, 63.1 Data processing, hosting and related activities; web portals. 95.11 Repair of computers and peripheral equipment

**Telecoms Services**
61 Telecommunications, 95.12 Repair of communication equipment

**IT Manufacturing**
26.2 Manufacture of computers and peripheral equipment

**Telecoms Manufacturing**
26.3 Manufacture of communication equipment

**IT & Telecoms Wholesale / Retail**
46.5 Wholesale of Information and Communication Equipment, 47.4 Retail sale of information and communication equipment in specialised stores

The Labour Force Survey (LFS)

The LFS is a quarterly social survey of around 60,000 households across the UK providing a wide range of socio-economic data relating to individuals and households across the UK. All LFS data presented in this report relates to individuals of working age (males aged 16-64 and females aged 16-59) in employment unless otherwise stated.

In Northern Ireland, 3,250 addresses each quarter are included in the sample for NI equating to approximately 2,700 ‘active’ households each quarter being included in the survey. Data is presented as a four quarter average to improve accuracy and precision (i.e. lower standard errors).

**The Interdepartmental Business Register (IDBR)**

The IDBR is a list of UK businesses maintained by the Office for National Statistics (ONS). It is also a key data source for analysis of business activity. The IDBR covers businesses in all parts of the economy, missing some very small businesses operating without VAT or PAYE schemes (self employed and those with low turnover and without employees) and some non-profit organisations. The IDBR holds records of 2.1 million businesses in the UK representing nearly 99 per cent of UK economic activity. The IDBR provides information at enterprise (business) and local unit level (workplace/site which is part of an enterprise).

**The Northern Ireland Quarterly Employment Survey (QES)**

The QES estimates of the number of employee jobs. The QES covers all public sector employers, all employers with 25 or more employees and a representative sample of smaller firms. It provides employee jobs (rather than persons in employment) and estimates by gender, working pattern (full / part-time) by 2 digit Standard Industrial Classification 2007 (SIC07) for Northern Ireland as a whole. QES excludes all self-employed jobs. Data is only presented from December 2009 onwards due to discontinuity in the series.
The terms ‘companies’ is used interchangeably with ‘employers’ and ‘businesses’ in this document. Telephone interviews were based on employment and practice at the site (local unit).

**ICT**

The term ICT (Information and Communications Technology) is used within the NI ICT Snapshot to describe industries and/or occupations relating to IT and Telecommunications.

**ICT industry**

Definitions of the ICT industry/ICT firms may again vary according to the sources employed. For IDBR and LFS data the ICT industry is described according to the internationally based ‘Standard Industrial Classification’ SIC07 codes to include both IT & Telecoms related activities. See page 8 for the Standard Industrial classifications for the IT & Telecoms industry.

**ICT occupation**

Definitions of ICT occupations/specialists can also vary. LFS data is again presented according to the internationally based ‘Standard Occupational Classification’ SOC 2010 codes: IT & Telecoms Directors (1136), IT Specialist Managers (2133), IT Project & Programme Managers (2134), IT Business Analyst (2135), Programmers (2136), Web Designers (2137), IT & Telecoms Specialists NEC (2139), IT Operations Technicians (3131), IT User Support (3132), Telecoms Engineers (5242), IT Engineers (5245).

In the NI ICT Snapshot survey, the definition given for ICT specialists is: “by ICT specialists we mean someone whose primary role involves the design, development, implementation, operation, support or maintenance of IT or Telecommunications for either your firm or for your customers”.

**Large / small companies**

In the 2008, 2009, 2010 and 2012 surveys, “Larger companies” are defined as having 45 employees or more or are from the Invest NI provided sample. From 2013, “Large companies” are defined as having 50 employees or more and “small companies” less than 50 employees.

Results from larger companies have been analysed within the total sample and as a separate group in order to provide an indication of in the nature of skills and recruitment in companies that comprise the bulk of ICT employment and recruitment.

**Data currency**

Data presented within this report is correct at time of publication, though it should be noted that certain data sets may be updated from time to time in accordance with revisions undertaken by data providers.

**Survey dates**

LFS data used in this edition is the four quarter average for 2013.

NI ICT Snapshot survey dates:
- 2014: 12th November and 3rd December 2013
- 2013: 11th-25th February 2013
- 2012: 9th - 27th January 2012
- 2010: 22nd September and 12th October 2010
- 2009: 21st September and 2nd October 2009
- 2008: 24th November and 5th December 2008

**Skills shortages & gaps**

Skills shortages refer to the recruitment process and in particular, recruitment difficulties due to a lack of applicants with the required skills, qualifications or experience. Skills gaps are mismatches in the skills held/needed from ICT staff by their employers.

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**Acknowledgements: e-skills UK would like to thank the 300 companies in Northern Ireland who participated in this research and the Department for Employment and Learning for funding this work.**

For more information, on skills programmes in Northern Ireland see [www.e-skills.com/ni](http://www.e-skills.com/ni) and [www.align-it.co.uk](http://www.align-it.co.uk). For further information on the Bring IT On campaign please email carol.goyett@e-skills.com

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For further information please contact

e-skills UK
1 Castle Lane
London
SW1E 6DR

t: +44 (0)20 7963 8920
f: +44 (0)20 7592 9138
e: info@e-skills.com
w: www.e-skills.com