

CHARTING A COURSE FOR THE ECONOMY

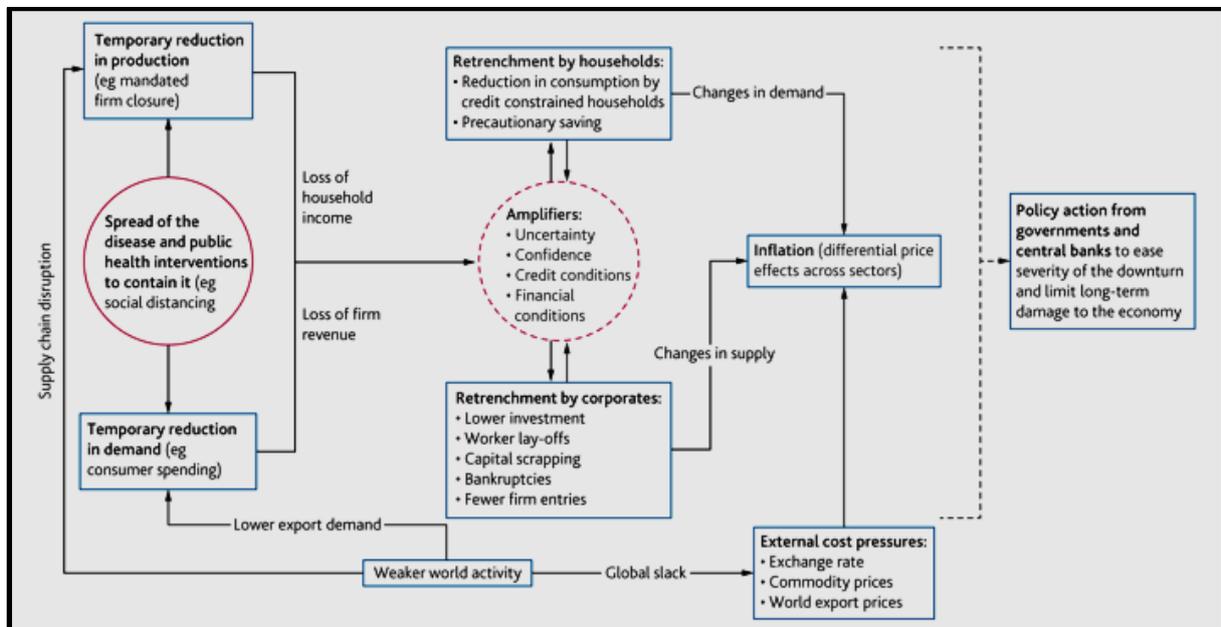
ECONOMIC EVIDENCE PACK

1. This pack provides a range of economic evidence around how the NI Executive might consider an approach to managing a gradual exit from lockdown, and in particular, managing the expectations of the public and businesses around any exit and its indicative timing. This paper concentrates on evidence around charting a course for business in the very short term, over the next couple of months. Much uncertainty will still remain beyond that initial period, but this planning can be periodically updated, with the time horizon edging forward at each of those updates.

Wider Economic Impact

2. In addition to the immediate health impact, the coronavirus outbreak has impacted on businesses, workers, government and society. The Coronavirus impacts on the economy in three main ways – by creating supply, demand and financial shocks. This outbreak has also created cashflow problems and labour supply issues.

Figure 1: How Covid-19 has affected the UK Economy ¹



¹ <https://www.bankofengland.co.uk/report/2020/monetary-policy-report-financial-stability-report-may-2020>

3. A full understanding of the economic impacts is essential. Key points are as follows:
- The economic impact of Covid-19 is unprecedented. Huge economic impacts that might normally take months or years to unfold have occurred in a matter of days and weeks. Most countries have responded with 'lockdowns' and 'industry shutdowns'.
 - The shutdown of many industries in Northern Ireland has resulted in the widespread furloughing of workers. There have been fewer examples of large scale redundancies by firms, and that is a sign that the policy is working. However, the data is indicating that unemployment is being disproportionately concentrated in certain categories. This could plausibly include the self-employed, those on temporary or on zero-hours contracts and those who have only been with their employers for a short time.
 - The latest available figures from HMRC indicate that some 8.4 million workers across the UK are on furlough and we estimate that around 200,000 or more jobs or people could well be furloughed in Northern Ireland. That is a huge dependency on temporary support. On top of this, there will be a number of workers in Northern Ireland who will have availed of the Self-Employment Income Support Scheme (SEISS) – perhaps tens of thousands.
 - The Ulster University Economic Policy Centre (UUEPC) have estimated that the NI unemployment rate could reach 6%.² This equates to an increase of around 30,000 unemployed people. The Bank of England forecasts a UK-wide unemployment rate increase of 5 percentage points for Q2 2020 – for Northern Ireland, this could mean an increase in unemployment of around 50,000.
 - According to the latest data, the Claimant Count in Northern Ireland rose by almost 90% in April³. They show that claimant count unemployment increased by over 26,000, to around 56,000. That is the highest monthly increase since records began and brings the total claimant count back to 2014 levels.
4. In Northern Ireland, our business activity, based upon the Ulster Bank PMI, in the private sector collapsed to 8.3 in April, another substantial decline from 29.1 in March, which itself was a record contraction in output and well below norms that would typically be measured at 50.0 or above.⁴ By way of comparison, the pre COVID-19 low point for the PMI occurred during the financial crisis when the PMI reading for business activity was 32.1 in January 2009.

² https://www.ulster.ac.uk/data/assets/pdf_file/0005/550166/UUEPC-Economic-Consequences-of-COVID19-090420.pdf

³ <https://www.bbc.co.uk/news/uk-northern-ireland-52719592>

⁴ <https://ulstereconomix.com/tag/pmi/>

5. The latest assessment by DfE puts the overall output within the NI economy at around 25% to 30% below normal. A similar assessment, produced for the whole of the UK by the Office for Budget Responsibility (OBR) suggests that output could be 35% below normal.⁵ At these rates, every month of lockdown will reduce annual output at the end of the year by around 2% to 3%. In simple terms, on its own, each month of shutdown is akin to a large recession.
6. Department for Communities data shows that the number of people claiming universal credit in Northern Ireland has almost doubled in two months. On 1 March, 70,000 people were claiming the payment, but by 26 April, that figure had risen to 126,000. Much of this initial wave is expected to represent job losses and unemployment.

Key Influences on Any Planning

7. Within this situation there are many things outside of our direct control. Effectively Governments nationally, and even more so regionally, are in a management process. While success in managing the situation might eventually allow Government to gain a level of control over the crisis, that can only occur once sound planning, management and influence of those factors outside of a Government's control have been achieved.
8. For a Devolved Administration there is much to plan and manage in order to gain that level of control. To illustrate the point, set out below are the five key areas that a Government needs to focus on within its exit strategy, as identified by the Institute for Government.
 - **Effective Implementation:** The IfG notes that UKG will need to work closely with local government, the devolved administrations and business leaders responsible for implementing many of the changes that the government will hope to effect. That applies equally to the NI Executive, perhaps more so with the need to cooperate across the island, and these are all levers of influence rather than levers of control.
 - **Clear communications and enforcement:** The potential for confusion is high. Already there is potential for divergence between UKG, the DAs and ROI in setting the rules and restrictions. In addition as the rules start to change the scope for greater divergence can increase if restrictions are lifted at different times for different groups or in different areas. In a situation where communication from UKG and ROI will be easily accessible to the local population there will be a need to manage nuances and differences within any local messaging.

⁵ <https://obr.uk/coronavirus-analysis/>

- **Encouragement and incentives may be needed:** The IfG notes that if communications are not enough, the government may have to consider incentive measures, such as temporary tax incentives, to encourage people to restart desirable activities. The NI Executive has little such control here as most tax levers reside with UKG. Indeed the single biggest incentive that UKG control is a *de facto* “return to work” incentive that will come with the end of CJRS and the SEISS. These are incredibly strong incentives outside NIE control, potentially influencing the behaviours of Circa 200,000 workers in Northern Ireland, their extended households and their employers.
 - **Adjust economic policies to facilitate and support the recovery:** The IfG recognises that (the massive) economic package currently in place will need to be amended as restrictions are lifted. However, the extent and duration of those restrictions are DA matters, but the vast bulk of the ongoing fiscal support for the economy is HM Treasury determined (CJRS and SEISS in particular). For DAs this introduces massive insolvency and unemployment risks that need to be managed. Any significant disjoint also risks wrecking the entire rationale and benefit of that huge temporary economic support and lead to a DA exposing itself to the maximum long term societal and economic scarring effect of the largest modern day recession.
 - **Public consent:** To date adherence to the lockdown measures have been remarkably high. As the restrictions continue there is always the risk of “losing the public”, but short of this there is also the risk of the public getting ahead of NI Executive policy. This latter type of risk has already been observed in specific events that have occurred in the crisis to date, and indeed also in events that are currently unfolding. As a result more of these risks can be expected if policy is not planned ahead of those events occurring – leading to the exit from lockdown being events driven rather than being the execution of a plan (and the knock-on consequences that this might entail).
9. Therefore, there are many challenges to manage, and to manage effectively they need to be planned for. One of the key health objectives will undoubtedly involve managing the infection rate, and keeping R below, or well below, a rate of 1. Almost certainly keeping R below 1 will not be consistent with life going back to normal. The Executive will not be able to lift all restrictions at once – some will be capable of being considered earlier than others, some may not be capable of being lifted without public or workplace adaptation, and some may continue on one form or another until a long term public health solution is found and scaled up.
 10. All the scientific evidence points towards an elongated health management challenge, measured in months and years. All the economic evidence points to the duration of the key fiscal supports being measured in weeks and months. There is little doubt that this circle may not square for everyone. As a result, on

the economic front there could well be a major management exercise around dealing with the unemployment and the insolvencies in those areas where the support runs out before the restrictions impacting those businesses or sectors are eased to the extent that trading could resume at normal levels.

11. With proper scenario planning we can better gauge which organisations, employing which people in which places might or might not make the cut, while also identifying those where there is little or no prospect of the circle being squared. For each of these groups early “Forward Guidance” or mapping out of an indicative timetable may have benefits in terms of reducing uncertainty and facilitating planning. For some on the potential cusp that might be the incentive to innovate – equally for others without positive long term prospects in some sectors there will be the realisation of the need to manage the decline rather than hold on in vain hope.
12. For the Executive we too need this same information – as we in the Executive will need to pick up the pieces. Devising scenarios around easing the lockdown will help us in identifying those business activities that might, that might not, and that almost certainly won’t survive the lockdown. That will help us pinpoint the people and the places at different level of risk and allow us to prioritise and plan a response around targeted support in terms of job matching services, retraining and other forms of economic development.
13. In order to gauge what a plausible roadmap to plan against might look like (and setting aside whether any such scenario would be made public) the following sections draw upon the following evidence for the following reasons.
 - **International Evidence & Experience:** While parallels are not always exact, the pathways deployed in gradually easing restriction in countries ahead of us do offer potential insight and learning.
 - **UKG, DA and ROI Plans:** The connections across the British Isles often lead to a desire or an expectation of coordination or a keeping in step between different areas – on all sort of matters. In addition public expectations can also be shaped by developments initiated elsewhere, including those approaches set out by UKG, ROI, Scotland and Wales.
 - **Local Initiatives:** What is developing on the ground should also feed into mapping out a plausible planning scenario. Local information and business intelligence can help us gauge businesses and sectors that are moving to a return to work mode, those businesses that are mothballing with an expectation of returning, and those in the mode of cutting their losses and exiting the industry.
14. Putting all of this together can feasibly allow us to develop a plausible planning scenario for a roadmap. That can allow a range of, often interconnected, cross

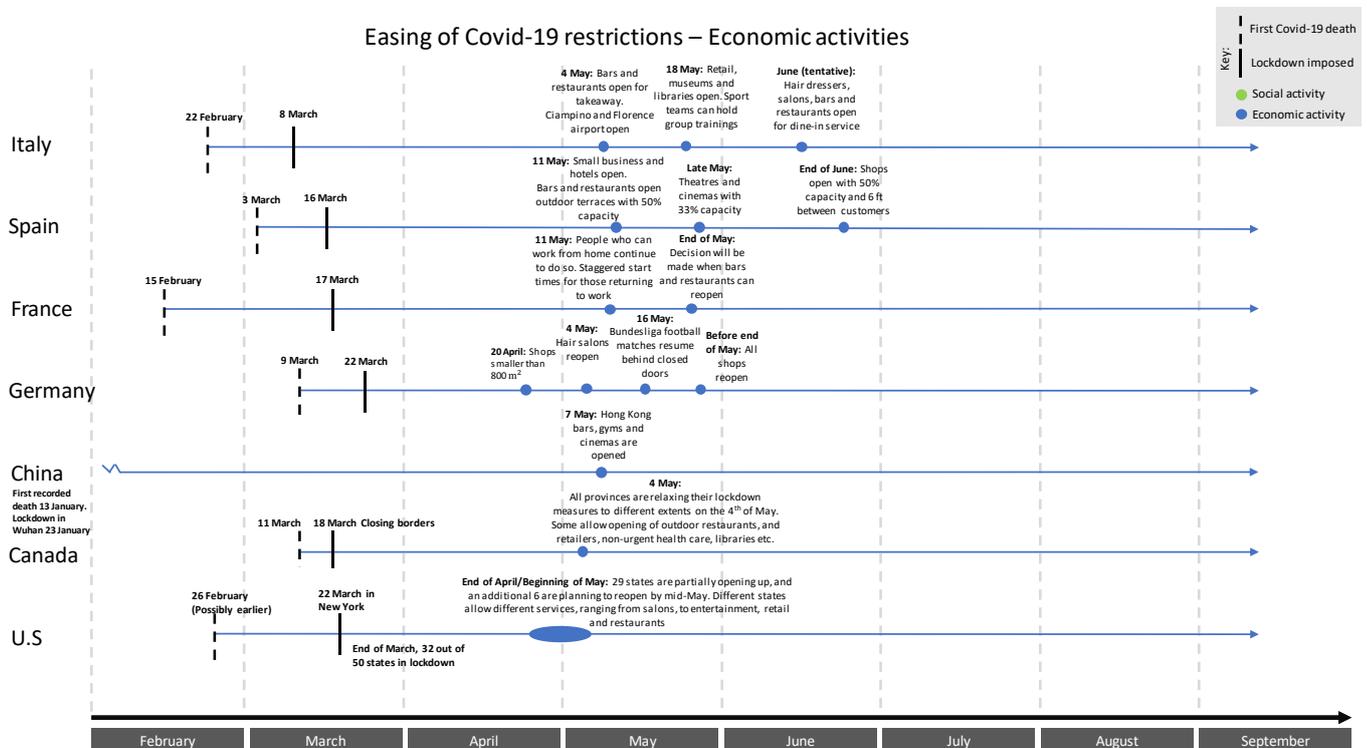
departmental planning to occur on a coordinated fashion. Any planning scenario would also be reviewed periodically, following particular major milestones.

International Evidence & Experience

15. Around the world economies are starting to lift lockdown measures with more set to follow in June, albeit that lifting very much involves social distancing measures being kept in place. The accompanying International Evidence Pack to this paper looks at the international evidence around how Governments around the world are approaching the easing of lockdown restrictions. The evidence in that paper touches upon both restrictions relating to social activities and economic activities, however, this paper focusses on the latter. In each of the countries looked at, balancing the lifting of restrictions to reduce economic and social damage and keeping COVID-19's R-rate under control will be the main driver for economies over the coming months.

16. The timeline below outlines the pathways for easing of economic and social restrictions for range of countries. Details of the supporting policies, re-opening activities and country statistics can be found in the specific country tables set out in a separate International Evidence Pack.

Figure 2: International Timetables for Economic Activities:



17. In summary, the findings of the review of the international evidence would be characterised as follows:

- Most countries have commenced an easing of lockdown. Federal countries have taken a more varied approach with different states having different timelines for easing restrictions, depending on the total number of covid-19 cases.
- Most governments have published roadmaps of a phased approach to easing lockdown restrictions to keep the level of transmission low but increase economic and social activity.
- Most countries have balanced economic and societal easing and have introduced economic stimulus packages to help stimulate economic growth after lockdown.
- Most countries have taken a phased approach which means certain sectors cannot reopen until a previous phase has been successful in keeping transmission levels low.
- Most countries have focused on allowing the construction and manufacturing sectors to reopen first with social distancing measures in place, retail has been the next sector to reopen followed by bars and restaurants in a later phase.

18. With most countries having focused on construction and manufacturing sectors, followed by retail the international evidence pack then provides a guide to the timing choices made by countries and regions internationally. Setting aside countries such as China which was impacted much earlier, there is significant concentration of timings commencing in May 2020, and also in many cases running into June 2020.

UKG, DA and ROI Plans

19. In line with emerging practice across the world plans and roadmaps are also being produced closer to home. Annex 3 includes a summary of the approaches that have been published in the other parts of the UK and in the Republic of Ireland.

20. On 10 May 2020 the Prime Minister announced the approach that is intended to be deployed in England with a document setting out plans the following day. The plan, summarised below contained a return to work message for those businesses permitted to trade, while it also set out an indicative timetable for opening other parts of economic and social activity.

Summary of the Steps in the UKG Recovery Strategy Document

STEP 1: MONDAY 11 MAY 2020

- Social distancing measures continue
- Work from home if you can
- Some industries, such as construction and engineering, are encouraged to go to work if safety measures are in place
- Avoid public transport if possible
- Take unlimited amounts of outdoor exercise
- Drive to do exercise if you want
- Play sports but only with your household
- Enjoy parks without having to exercise

WEDNESDAY 13 MAY 2020

STEP 2: MONDAY 1 JUNE 2020 AT THE EARLIEST

- Phased reopening of shops
- Schools could begin phased reopening (process will begin with reception, Year 1 & Year 6. Years 10 & 12 may get some time with teachers before the summer holidays).

STEP 3: WEDNESDAY 1 JULY 2020 AT THE EARLIEST

- Reopening of some of the hospitality industry
- Reopening of public places.

21. Within the plan and the announcement an emphasis was placed on the gradual and incremental nature of the steps, and also on conditionality with the potential for restrictions to be re-imposed.
22. The Irish Government has also published its roadmap for reopening society and business, with 18th May being earmarked as the day where “Ireland begins to reopen and begins that journey to a new normal”. The Irish Government outlined a phased reduction of restrictions, both social and economic, to a specific, timetable as follows, albeit with the clear proviso that restrictions could be re-imposed if that were needed:

Figure 3: Irish Plan Phases

Based on a 3 week review process, the current phases would commence on the following date:	
Phase 1	18 th May
Phase 2	8 th June
Phase 3	29 th June
Phase 4	20 th July
Phase 5	10 th August

23. Again fuller details of the Irish plan are set out in Annex 3, but Phase 1 involves the phased return of outdoor workers, such as construction, and outdoor retail outlets such as garden centres, while also including retail outlets that were open in Tier 2 (e.g. homeware, opticians, motor, bicycle & repair, office products, electrical, IT, phone sales & repair etc.).

24. The continuance of Remote Working where that is feasible is a mainstay of Phases 1 to 4 within the plan. Phase 2 will see the reopening of small retail outlets and marts, with the remaining non-essential retail outlets opening in Phase 3 but with restrictions on the number of staff and customers.

Local Initiatives

25. Within the existing regulations there is a significant middle ground that was neither specifically endorsed as essential (such as Off Licences) nor prescribed by the regulations (such as Bingo Halls). In many cases businesses in this space took individual decisions to close, or scale back, despite not being required to by the regulations. There are likely to be a combination of reasons at play in their decisions.

26. Undoubtedly many business experienced a major drop off in demand (such as exports to Italy or demand from impacted industries such as events companies) and, in combination with the HMRC furlough scheme, there was an incentive to mothball operations for a period. Some businesses also faced disruptions to their supply chains and had difficulty sourcing components (for example from China) which impacted on their ability to maintain output. There is also a widespread perception, informed by feedback from businesses themselves, that the power of the “Stay at Home” message was also very influential in businesses scaling back or closing down. Certainly there is evidence on the ground that many companies took the opportunity to close down temporarily, and furlough staff, in order to examine their process and work practices with the aim of restarting operations once that was complete.

Case Study: Large Manufacturing Business Social Distancing Case Study

A large engineering company based in Belfast, when it stopped operations on the 23rd of March it employed a total of over 500 staff. A small proportion of agency employees lost their jobs and just under 500 permanent members of staff were put on furlough, with a small number remaining in work.

The company drew social distancing plans informed by others plants in their world-wide company (particularly from sister plants in countries impacted first). They have benchmarked this against others in the sector and they have changed their operations to allow for return of staff, including things like: reconfiguring the work place layout to remove staff gathering (canteens etc), provided staff with PPE and take temperatures on staff entering every morning.

The company restarted part production on the 4th of May and is hoping to have full production up and running by the 18th of May (this will involve the phased increase of staff returning on a weekly basis). The company is concerned with Government communication, with very confused messages being delivered in terms of ‘stay at home’ verses ‘return to work’. They feel that there needs to be a very clear ‘back to work safely’ message delivered now in order to help with the restart of the economy.

27. There is mounting evidence that this middle ground is quickly gearing up to move out of lockdown mode into a restart mode, and in some cases those restarts have already occurred. Within the last week to ten days we are now also seeing this within the Invest NI Furlough data. Within what is a short period of time, evidence is emerging of quite a rapid return to work on many fronts, including particularly within Manufacturing and the Construction sector, with some evidence also within Financial, Professional & Business Services. Already some 230 of Invest NI client companies are signalling a return to work, representing 16% of furloughed staff within all of the Invest NI client base.
28. On the ground these firms have taken or are proposing steps to develop/alter working practices and protocols, in particular across the wider manufacturing and food production sectors. Such proposals include:
- Adjusted layouts such as moving from “U” shaped lines to straight production lines to facilitate 2 metre distancing;
 - Adding Perspex walkways and reorganising inventory to eliminate crossover points;
 - Facilitating working side-by-side/back-to-back and reduced production lines;
 - Emphasising that those with symptoms of coronavirus (a new continuous cough, a high temperature, a loss of, or change in, your normal sense of taste or smell (anosmia)) are expected to self-isolate at home;
 - Splitting work patterns and sittings in canteens, renting marquees and extra toilets; and
 - Procuring PPE and increasing sanitisation/cleaning of premises.
29. As projected in our previous macroeconomic papers, around labour supply impacts, school closures along with travel restrictions/stay at home messaging is frequently cited by businesses as impacting upon the operational ability for all sectors of the economy. Maintaining social distancing in practice has ultimately meant a drop in productivity for some companies or impacted supply chains which has helped make their decision to close operations. In some instances staff anxiety around social distancing has seen some employers opt to furlough staff with caring responsibilities or health issues. For sectors where home working is possible, this has greatly helped with staff able to work from home while also caring for their children. In addition, flexible shift arrangements have enabled workers to split standard hours over a longer period of the day, allowing services to be provided out of hours for critical customers.

Case Study: Manufacturing Social Distancing Case Study

Located in Mid Ulster the company, like many in the area, designs and manufactures equipment used for recycling and materials handling. Employing around 150 staff, the company furloughed its entire workforce on the 23rd of March.

The company have now got in place a social distancing plan, spending some £25,000 on a range of measures. These include: daily temperature checks on staff, some shift working patterns, the installation of Perspex screens, extra sinks and sanitiser areas, the installation of one way system to minimise contact between staff, and new rules for staff, for example no leaving the premises during lunch breaks.

The company returned to work at the start of May, and aim to return back to full operations by the end of May. The company has concerns around furloughing and staff returning to work and would welcome greater clarity from Government. The industry in Mid Ulster also may not be able to recruit their usual requirement of school leavers into apprenticeships. Normally some 350 school leavers would be employed each year but there are concerns that this year's recruitment drive will be lost, creating missed opportunities for young people in the area and a talent void in upcoming years.

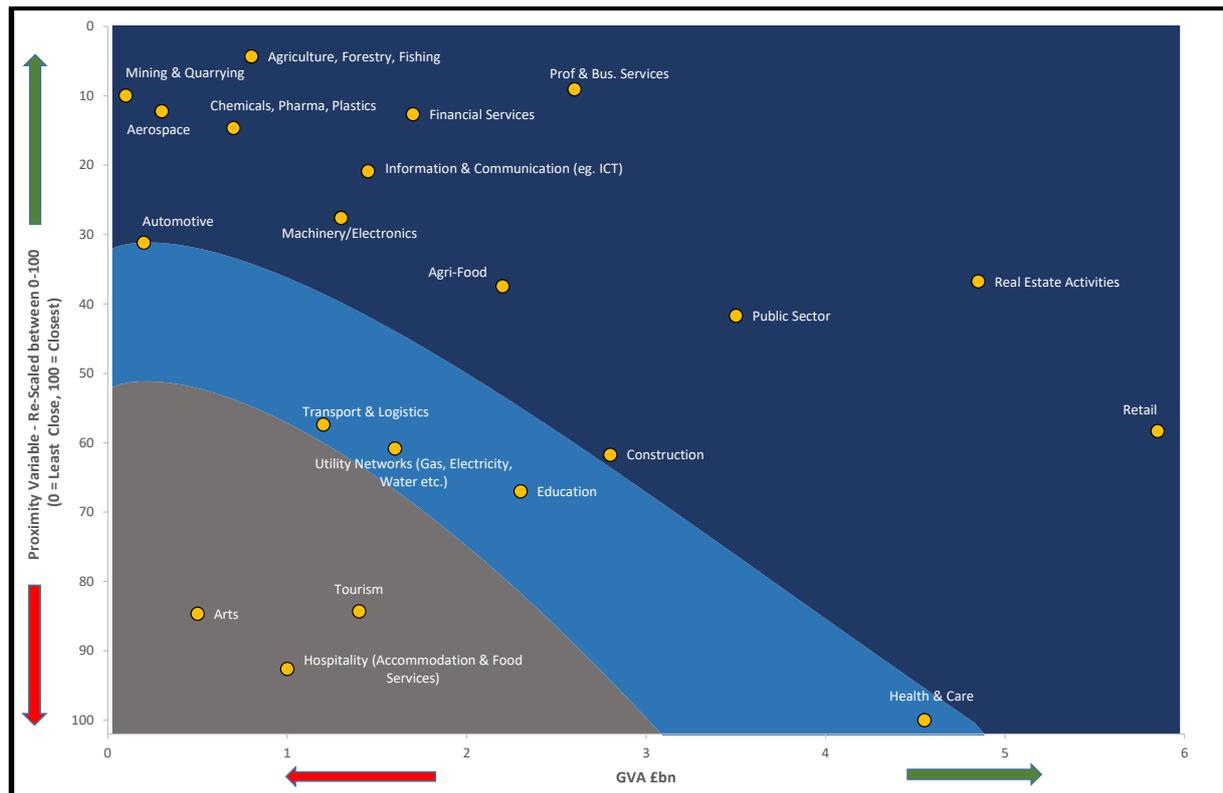
30. Feedback from businesses suggests they recognise that, along with adaptations to work practices, the wider situation can present a range of challenges to people engaging in work. They recognise the challenges for parents around school closure and they also acknowledge that many people will be anxious about returning to normality if they have underlying health conditions. They also appreciate that there will be a new 'normal' way of working with remote working becoming a more regular feature to provide business resilience.
31. Ultimately there is a wide consensus for the need for consistent and clear guidance on social distancing from Government and for these to be widely accepted by employers, employees and the public. While business craves that clarity they are not necessarily prepared to sit tight and wait until it might be provided by Government. Businesses that made choices to shut down, if they haven't already done so, are quickly gearing up to move out of lockdown mode into a restart mode, and in many cases those restarts have already occurred.

Indicative Roadmap for Business

32. Many countries around the world have commenced an easing of lockdown, and most governments have published roadmaps of a phased approach to easing lockdown restrictions to keep the level of transmission low but increase economic and social activity. Within this, a majority of countries have taken a phased approach which means certain sectors cannot reopen until a previous phase has been successful in keeping transmission levels low. In addition, closer to home, the UK Government and Ireland have taken similar steps and produced their own roadmaps around potential stages of re-opening.

33. For us in Northern Ireland, as part of charting a course it also important to gauge the risks, both the risk to social distancing and the relative economic importance of each sector to identify those sectors of the economy that could be restarted the earliest. The chart below does that by mapping sectoral Gross Value Added (GVA)⁶ in £bn against the risk to social distancing, which is displayed by the extent that a sector requires employees to perform tasks in close physical proximity to other people.

Figure 4: NI's Economic Sectors, their size, and general proximity to people.^{7 8}



34. More detail on the approach is set out in Annex 4, but this quantitative approach positions three sectors as potential candidates for consideration of increased activity at the appropriate stage. These are the construction, retail and manufacturing sectors. Unsurprisingly all three of these have much reduced scope for working from home as an alternative approach to continuing to trade. In

⁶ Data is intended to be indicative of the sector size, and some of the data is from alternative sources and years; therefore in some cases overlaps or omissions are possible at the sectoral / sub-sectoral level. For example, Tourism output is already captured within the GVA of some other sectors and is only shown for indicative purposes only. It should also be noted for example, that Professional & Business Services is a subset of sectors (with greater combined output than shown above).

⁷ <https://www.onetonline.org/find/descriptor/result/4.C.2.a.3>

⁸ The proximity values displayed on the y-axis (vertical) show the average level across each sector – with individual occupations within each industry being accounted for as best as possible. The values range depending on the various occupations within each industry and the final proximity value is only meant as a general approximation.

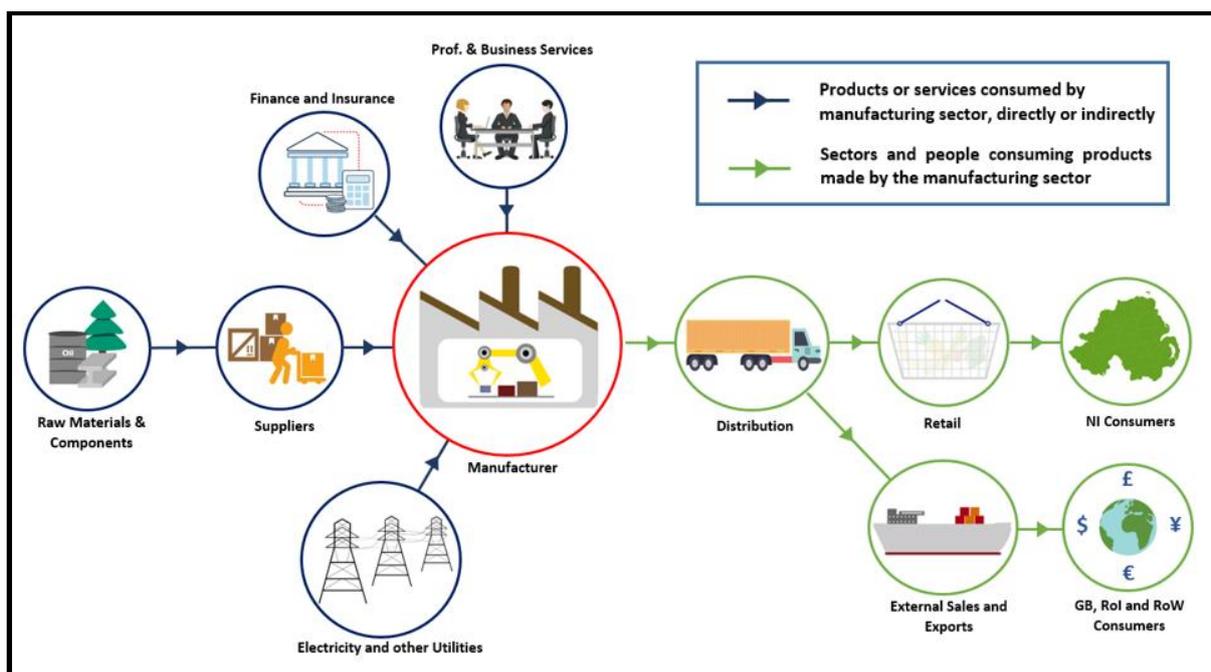
addition, on the labour market side, Retail is a large employer and an industry that underpins our town centres, and one that is under significant pressures from many angles. In respect of those competitive pressures the current differentiation in lockdown is creating a very uneven playing field, not just in relation to online retail but also in relation to those parts of retail that are encouraged, as essential, to stay open and the unforeseen opportunity for the big supermarkets to increasingly dominate on a whole range of non-food retail.

35. Looking beyond NI, the International Evidence on the reopening of economic activity has a significant degree of commonality. Most countries have focused on allowing the construction and manufacturing sectors to reopen first with social distancing measures in place, retail has been the next sector to reopen followed by bars and restaurants in a later phase. That same experience is also there with the plans in England and those in Ireland, with Manufacturing and Construction already operating or earmarked for a return, with some sort of more tentative or phasing of retail as a next step. The windows for re-opening activities such as bars and restaurants tend to be further out.
36. Locally the experience on the ground is that returns to work are already occurring within the Manufacturing and Construction sectors. Over the last week that momentum seems to have gathered pace and there is mounting evidence of substantial returns to work being planned within both Manufacturing and in Construction.

Charting a Course: Construction & Manufacturing

37. In terms of charting a course of business, within all the evidence (local, national and international) a clear pathway is emerging. There are activities that are already emerging from lockdown in Northern Ireland and in other parts of the world, and Manufacturing and Construction are both currently permitted activities under the current NI regulations. For coordination, for clarity and for confidence there will need to be an examination of our communication messages to businesses. Clearly there are many companies out there, big and small, that need a level of reassurance that Government is not providing mixed messages and leaving them exposed.
38. For Manufacturing and Construction there will also be steps needed to coordinate restarting operations with suppliers and customers, taking accounting of their integrated supply chains and lead-in times. It may take weeks or months for businesses to fully restart production due to the complex supply chains. Furthermore, the wages of these workers and the workers in companies within the supply chains all drive further economic activity. These interdependencies are further detailed graphically in Figure 5 below.

Figure 5: Stylised Example of Inputs and Outputs for Manufacturing



Charting a Course: Non-Food Retail

39. Unlike Manufacturing and Construction a range of Non-Food Retail is subject to the regulations and are not permitted to host customers on premises, effectively closing those premises outside of on-line or delivery services. Internationally, and closer to home, road maps for the reopening of Non-Food Retail are at the earlier stages of plans, often in their first or second steps, but always on some sort of phased or staged basis. In terms of timing, many countries are already commencing those steps or are earmarking those steps for May or June 2020.
40. Non-Food Retail is also quite diverse in both its activities, size and locations, and so that is one of the reasons why countries are approaching it in a phased or staged basis. However, while there is no one uniform approach taken by countries to the re-opening of Non-Food Retail, there is scope to take a sub-sectoral approach, or an approach based upon size, or upon location or some combination of all of these different factors.
41. In these circumstances there would be clear benefit in the Department for the Economy bringing forward proposals around planning a careful and staged reopening of the Non-Food Retail sector. This can act to provide additional detail for the NI Executive's overall roadmap, while helping to ensure that the approach to the sector is not just careful but also strategic rather than ad hoc or reactive.

ANNEXES ON NEXT PAGES

NI SOCIAL DISTANCING MEASURES – BUSINESS IMPACTS & CHALLENGES

DfE Business Intelligence Team

Background

1. As part of the Department for the Economy input into the Department for Business, Energy & Industrial Strategy (BEIS) commissioned Covid-19 Sectors & Regional/Devolved Administrations dashboard DfE Business Intelligence Team put out a request across NICS Departments, Trade Bodies, InvestNI, InterTradeIreland and Councils seeking information on the impacts of social distancing on business. This paper has been produced to supplement the social distancing information within the dashboard to indicate the breadth of detail on the impacts and challenges facing Northern Ireland (NI) business on social distancing and to inform future decision making. In addition the team have also engaged directly with businesses – case studies.
2. The paper initially looks at key themes from stakeholder responses to four questions, originating from BEIS, on social distancing then proceeds to highlight those responses by sector. The four questions posed were:
 - *What elements of the social distancing guidance have affected your sector's ability to operate the most (e.g. office or plant closures, school closures, travel restrictions, remote working)?*
 - *What alterations could be safely deployed to help the most, at the appropriate time (e.g. staggered shifts)?*
 - *If social distancing measures stay in place, what more can HMG do to support business (e.g. clearer messaging)?*
 - *If social distancing measures are relaxed, what remaining challenges does the sector expect?*

Social distancing guidance that has impacted NI business' ability to operate

3. Business and school closures along with travel restrictions/stay at home messaging has predictably impeded operational ability for all sectors of the economy. Maintaining social distancing practice has ultimately meant a drop in productivity for some companies or impacted supply chains which has helped make their decision to close operations. In some instances staff anxiety around social distancing has seen some employers opt to furlough staff with caring responsibilities or health issues.
4. School closures have impacted heavily on staff with children, who have to be at home to take care of them as they cannot be left child-minders or relatives due to social distancing requirements. For sectors where home working is possible, this has greatly helped with staff able to work from home while also caring for their children. In addition, flexible shift arrangements have enabled workers to split standard hours over a longer period of the day, allowing services to be provided out of hours for critical customers.

5. However in sectors where remote working has partly mitigated social distancing measures they are not without detriment as client facing operations and hiring has been impacted in instances where the face to face engagement element of business cannot be fully replicated by technology.

Proposed workplace alterations to meet social distancing

6. NI businesses have demonstrated resilience and ingenuity in adapting where possible to new ways of working/operating social distancing within a short timeframe.
7. Sectors such as professional/business, ICT and financial service sectors are encouraging remote working where possible and leasing IT equipment to more effectively make the transition.
8. Firms have taken or are proposing steps to develop/alter working practices and protocols, in particular across the wider manufacturing and food production sectors. Such proposals include:
 - Adjusted layouts such as moving from “U” shaped lines to straight production lines to facilitate 2 metre distancing;
 - Adding Perspex walkways and reorganising inventory to eliminate crossover points;
 - Facilitating working side by side/back to back and reduced production lines;
 - Emphasising that those with symptoms of coronavirus (a new continuous cough, a high temperature, a loss of, or change in, your normal sense of taste or smell (anosmia)) are expected to self-isolate at home;
 - Splitting work patterns and sittings in canteens, renting marquees and extra toilets; and
 - Procuring PPE and increasing sanitisation/cleaning of premises.
9. The firms that have already made these alterations to account for social distancing measures have communicated that it is unlikely that further changes could be made to enhance or increase operations and have called for a relaxation or revision of social distancing measures. In addition, there is concern that the introduction of shift working where not previously used will incur a financial premium that may impact on business margins and viability.

What can HMG do to support NI business on Social Distancing?

10. There is a wide consensus from NI businesses expressing a need for consistent and clear guidance from the relevant authorities on social distancing (including the types of mitigations that are suitable) and for these to be shared and accepted widely amongst employers, employees and the public. Getting employees and customers to return to the market is vital for business viability and to do so there is a need to alleviate fear and anxiety on relaxed social distancing by providing a clear message that measures promoted will still be able to offer suitable protection going forward.

11. Applying social distancing measures has placed an additional financial burden on firms, putting pressure on already stretched working capital. Firms have expressed the need for Government financial assistance support packages specifically to mitigate these significant operational costs such as: changing/altering layouts; providing shift allowance payments from altering staff shift patterns to out of hours working; procuring PPE; and increasing cleaning/sanitation of premises.
12. Firms have also asked for suitable access to PPE and Covid-19 testing kits. Advanced warning of any relaxation of social distancing has also been requested due to lead in times for re-opening and attracting customers in sectors such as hospitality, retail and tourism.
13. Manufacturing, food production and construction sectors have called for gradual relaxation of the 2 metre social distancing rule to align with European or WHO guidelines (1- 1.5 metre). Many production firms have already slowed production lines, with more space between workers causing other difficulties across production and distribution impacting sustainability and putting them at a disadvantage with global competitors.

Challenges ahead for NI business if Social Distancing is relaxed

14. Further challenges ahead (beyond the global economic downturn) include the need to restart without a return to workplace conflict that existed previously due to misunderstanding on social distancing. Getting employees back off furlough is going to be a significant challenge for some sectors again emphasising the need for clear and consistent guidance from health authorities and government.
15. While many will want to revert to business as usual as quickly as possible, there is likely to be an urgency to implement operational changes to address the aftermath of lockdown. In addition many people will be anxious about returning to normality if they have underlying health conditions. It is likely that there will be a new 'normal' way of working with remote working becoming a more regular feature to provide business resilience.
16. There are however concerns over the short term impact of this method of working and the lack of personal engagement on staff mental health.
17. Lack of demand globally with existing orders potentially cancelled or delivery dates extended are seen as significant challenges for production firms. New orders will take time to build, operational efficiency will be low, overheads may be disproportionate relative to output and there may be supply chain issues/difficulties. Cash flow has been a substantial issue for firms throughout the lockdown period and will continue to be a challenge. The message from business is very much that recovery will take time.

NI Business Social Distancing Case Studies

18. DfE Business Intelligence Team have also been engaged directly with businesses to understand how social distancing measures have impacted on individual firms. Although the themes are consistent with what has been noted already in this paper. Specific key themes have included the need for the following;

1. Clear communication

- a. Businesses require clear and concise messages from Government, issued in a timely manner around:
 - Available grants/ mitigations (and who can apply)
 - Essential workers
 - Staying at home/ returning to work
 - Social distancing guidance (sector specific)
 - PPE Guidance
 - On Government's exit strategy/ plan
 - Businesses are also requesting clear, joined up messaging from NI Executive

2. Funding for PPE/ Social distancing measures

Businesses are requesting grants/ financial aid for PPE and required social distancing measures (although many require guidance first on what is required).

3. Continuation of key financial support measures provided

- a) Rolling rates relief, revaluation of rates in the hospitality sector will also be required.
- b) VAT and tax deferrals for a number of years, not the months as currently on offer, many sectors are in such a poor place that it will take years to recover.
- c) Deferrals on capital loan repayments from the banking sector, which, if not granted could result in businesses closing and no repayments made at all.
- d) Under EU rules VAT on hospitality can be reduced separately from the rest of the economy, Hospitality Ulster would like to see this explored.
- e) The cost of redundancies could close businesses, or lead to staff being made redundant sooner. Government assurances to help with redundancies costs could mean businesses retaining staff for a longer period.
- f) An adoption to the JRS to allow for phased/ staggered return of employees. The current scheme needs to be re-designed to allow more flexibility.

4. Government planned infrastructure

Important for the Government both at local and national level to continue with major infrastructure projects as soon as possible which will help drive the economy forward.

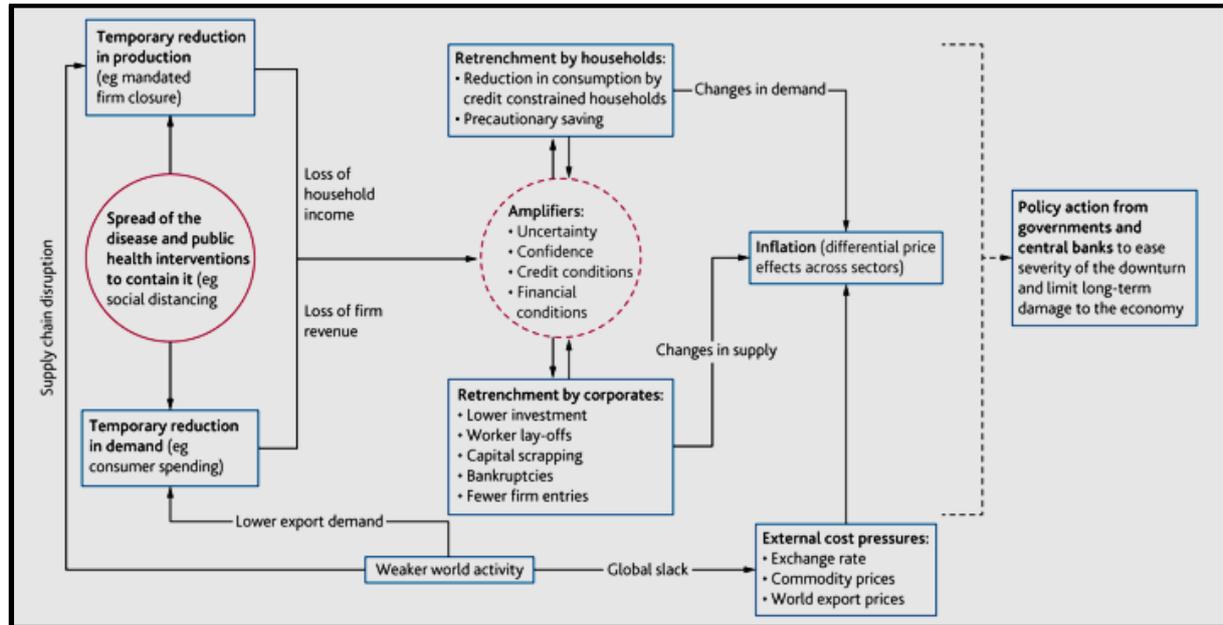
Conclusion

19. This paper examines the key themes from stakeholder responses on social distancing in NI businesses. Business and school closures along with stay at home messaging has greatly reduced economic activity. Businesses have demonstrated resilience in adapting where possible to new ways of operating social distancing within a short timeframe. There is a wide consensus for the need for consistent and clear guidance on social distancing from Government and for these to be widely accepted by employers, employees and the public. Firms have expressed a need for financial support from Government to mitigate the additional financial burden of implementing social distancing measures. Cash flow has been a substantial issue for firms throughout the lockdown period and will continue to be a challenge. It is likely that there will be a new 'normal' way of working and the message from the business community is that recovery will take time.

COVID-19 – SUMMARY OF ECONOMIC UPDATE

In addition to the immediate health impact, the coronavirus outbreak has impacted on businesses, workers, government and society. The Coronavirus impacts on the economy in three main ways – by creating supply, demand and financial shocks. This outbreak has also created cashflow problems and labour supply issues.

How Covid-19 has affected the UK Economy ¹

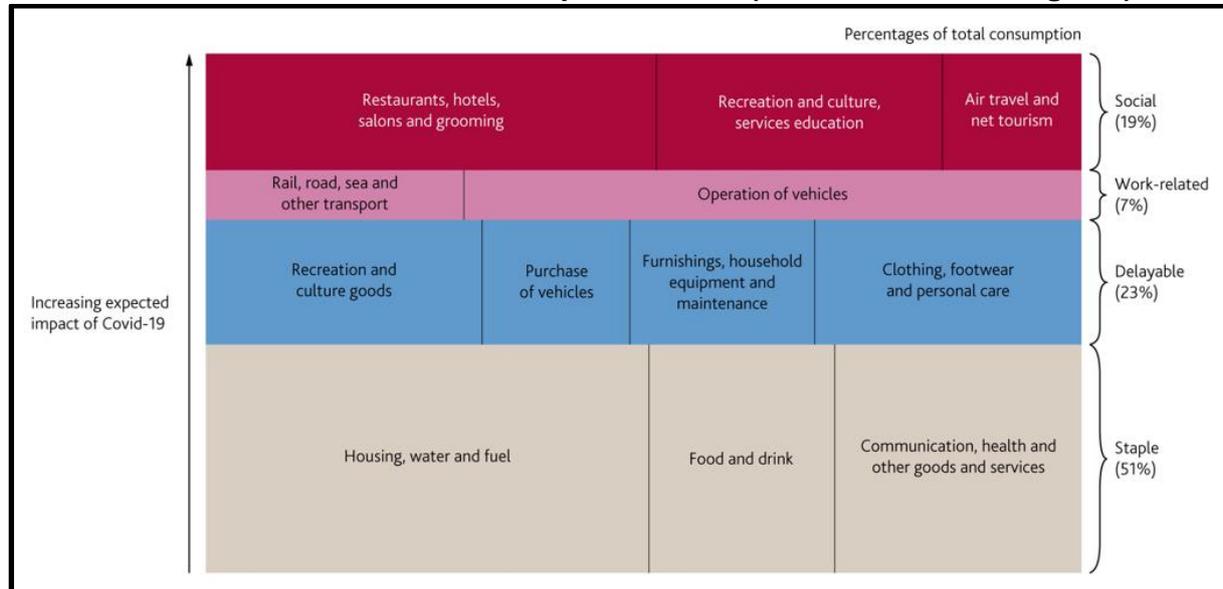


A full understanding of the economic impacts is, therefore, essential. Key points from the Department for the Economy (DfE) briefing to the Executive are:

- The economic impact of Covid-19 is unprecedented. Huge economic impacts that might normally take months or years to unfold have occurred in a matter of days and weeks. Most countries have responded with 'lockdowns' and 'industry shutdowns'.
- The shutdown of many industries in Northern Ireland has resulted in the widespread furloughing of workers. There have been far fewer examples of large scale redundancies by firms, and that is a sign that the policy is working. However, the data is indicating that unemployment is being disproportionately concentrated in certain categories. This could plausibly include the self-employed, those on temporary or on zero-hours contracts and those who have only been with their employers for a short time.
- The latest available figures from HMRC indicate that some 8.4 million workers across the UK are on furlough and we estimate that around 200,000 or more jobs or people could well be furloughed in Northern Ireland. That is a huge dependency on temporary support. On top of this, there will be a number of workers in Northern Ireland who will have availed of the Self-Employment Income Support Scheme – perhaps tens of thousands.
- The Ulster University Economic Policy Centre (UUEPC) have estimated that the Northern Ireland unemployment rate could reach 6%.² This equates to an increase of around 30,000 unemployed people. The Bank of England forecasts a UK-wide unemployment rate increase of 5 percentage points for Q2 2020 – for Northern Ireland, this could mean an increase of around 50,000 unemployed people (approximately).

In terms of sectors impacted, the collapse in spending on goods and services that are heavily affected by the lockdown, such as transport, restaurants, housing goods, hotels and entertainment, represents a big blow to the economy because those items add up to around 50% of family spending.

Share of annual UK household consumption in 2019 (ONS and Bank of England)



Initial assessments put the overall output within the NI economy at around 25% to 30% below normal. A similar assessment, produced for the whole of the UK by the Office for Budget Responsibility (OBR) suggests that output could be 35% below normal. At these rates, every month of lockdown will reduce annual output at the end of the year by around 2% to 3%. In simple terms, on its own, each month of shutdown is akin to a large recession.

OBR's Estimate of UK Output losses by sector in the second quarter of 2020³

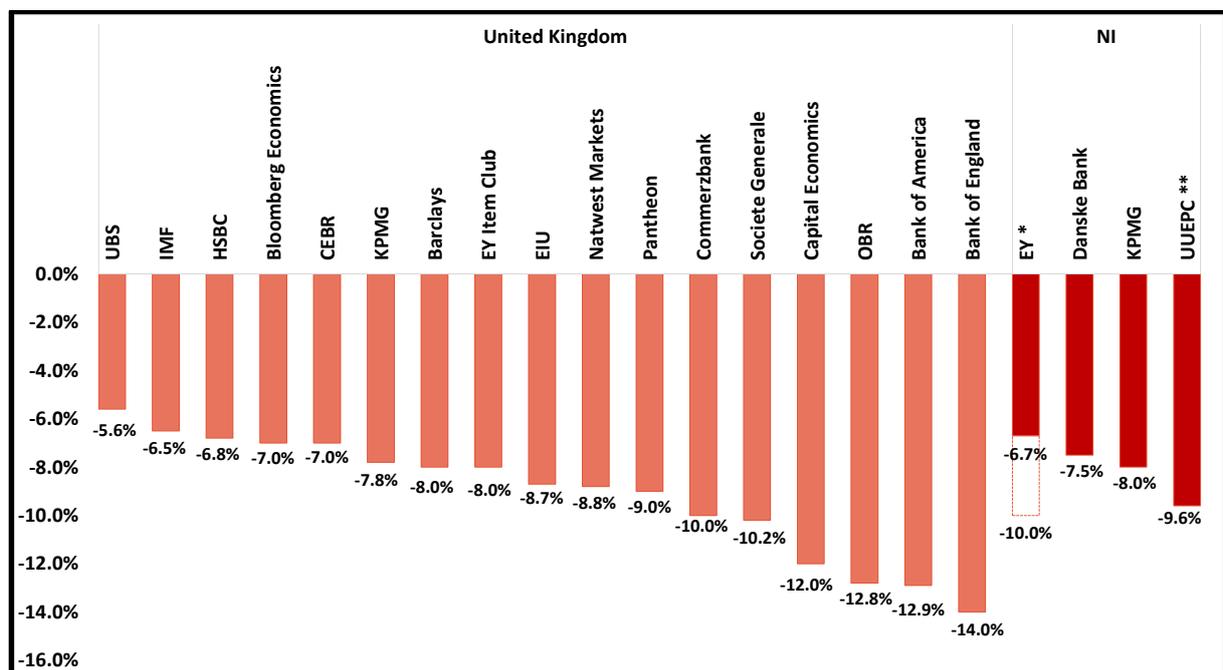
Sector	Per cent	
	Weight in whole economy value added	Effect on output relative to baseline
Agriculture	0.7	0
Mining, energy and water supply	3.4	-20
Manufacturing	10.2	-55
Construction	6.1	-70
Wholesale, retail and motor trades	10.5	-50
Transport and storage	4.2	-35
Accommodation and food services	2.8	-85
Information and communication	6.6	-45
Financial and insurance services	7.2	-5
Real estate	14.0	-20
Professional, scientific and technical activities	7.6	-40
Administrative and support activities	5.1	-40
Public administration and defence	4.9	-20
Education	5.8	-90
Human health and social activities	7.5	50
Other services	3.5	-60
Whole economy	100.0	-35

Northern Ireland's business activity in the private sector (based upon the Ulster Bank PMI) collapsed to 8.3 in April, another substantial decline from 29.1 in March, which itself was a record contraction in output and well below norms that would typically be measured at 50.0 or above.⁴ By way of comparison, the pre COVID-19 low point for the PMI occurred during the financial crisis when the PMI reading for business activity was 32.1 in January 2009.

Ulster University's Economic Policy Centre (UUEPC) have estimated the impact on economic output (GVA) for Northern Ireland⁵. In their analysis, they expect consumption and investment to reduce, but Government expenditure to increase. Overall, output is expected to reduce by 9.6% in annual terms. It is important to recognise that given the extreme uncertainty, this analysis should not be considered as an economic forecast, but rather an order of magnitude estimate of the impact of a lock-down for Q2 only (i.e. April to June 2020). The extent of either prolonged lower economic activity or compensatory additional economic activity in Q3 (i.e. July to September) and beyond has not been considered.

A summary of recent economic forecasts for the UK and for Northern Ireland is provided in the graph below. It should be noted that these forecasts are assumptions-based, with many factoring a recovery towards the end of the year. Danske Bank have forecast growth of -7.5% for the Northern Ireland economy in 2020. However, this is conditional on the shock being concentrated into the first half of 2020, with an expectation that activity will begin to recover gradually in the second half of this year and into 2021, with government policy measures supporting the recovery. The forecasts anticipating the most severe recession for the 2020 year are typically some of the most recent (OBR, Bank of England etc).

Recent Estimates of UK and NI Economic Growth for 2020



* Also includes an alternative, more pessimistic forecast (dotted line).

** Not an economic forecast, but an order of magnitude estimate (2020) if Q2 lockdown only.

It is worth stating that if a little over a quarter of 'lockdown' creates a recession of around -10% for Northern Ireland, then a delay into Q3, with the lockdown well into the third quarter is continuing the economic pain. It is also worth noting that while shutting down an industry is relatively straightforward, restarting production and service delivery is not as easy. Many businesses rely upon complex supply chains. They will also need time to put in place PPE

measures and design social distancing restrictions (i.e. rotas for staggered working etc). Many service-orientated businesses rely upon consumer confidence. All these things require a lead-in time.

Arguably, of greater significance than the levels of output being substantially down due to the outbreak, is the impact on the labour market. The HMRC administered Job Retention Scheme (JRS) only opened on the 20 April 2020, but the numbers of *jobs* being furloughed stands at 8.4 million across the UK (HMRC data from 27 May 2020), over a quarter of workers. The number of *people* furloughed might be a little lower, though, as some could have more than one furloughed job. The JRS has been used by almost one million businesses.

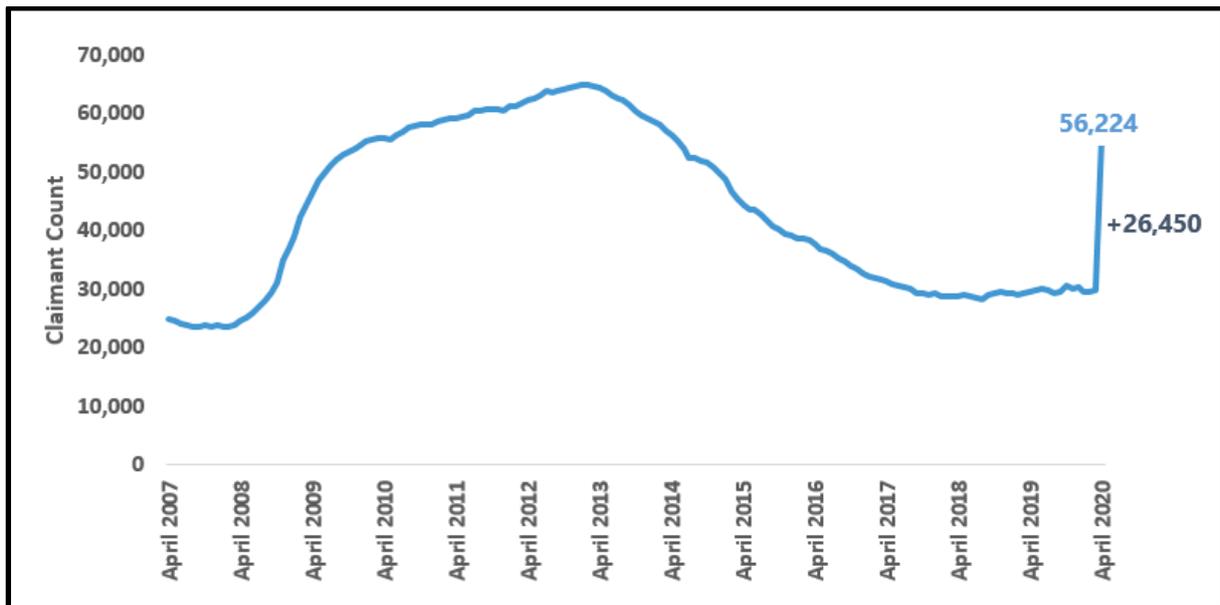
The scheme will continue in its current form until the end of July and the changes to allow more flexibility will come in from the start of August. More specific details and information around its implementation will be made available by the end of this month.

The government will explore ways through which furloughed workers who wish to do additional training or learn new skills are supported during this period. It will also continue to work closely with the Devolved Administrations to ensure the scheme supports people across the Union.⁶

The JRS has been extended to October⁷, Chancellor Rishi Sunak confirmed that employees will continue to receive 80% of their monthly wages up to £2,500. But the government will ask companies to "start sharing" the cost of the scheme from August. The Chancellor confirmed that from August, the scheme would continue for all sectors and regions of the country but with greater flexibility to support the transition back to work. Employers currently using the scheme will then be able to bring furloughed employees back part-time. Mr Sunak said he was "extending the scheme because I won't give up on the people who rely on it." He also rejected suggestions some people might get "addicted" to furlough if it was extended.

While the JRS has significantly limited job losses, the flow of new Universal Credit benefit claims and early indicators of redundancies suggest that unemployment has risen sharply over the past couple of months. The Bank of England forecast that the unemployment rate for the UK is expected to rise to 9% in Q2 of 2020.⁸ This is around a 5 percentage point (p.p.) increase. By way of comparison, a 5 p.p. increase in Northern Ireland's unemployment rate would equate to an increase of 50,000 in the number of unemployed, currently recorded at just over 20,000. Even if only a fraction of this Bank of England forecast of a 5 p.p. increase materialises for workers in Northern Ireland, it still represents a sudden reversal of fortunes for the labour market, with many workers facing a grim outlook.

Northern Ireland Claimant Count



Department for Communities data shows that the number of people claiming Universal Credit in Northern Ireland has almost doubled in two months. On 1 March, 70,000 people were claiming the payment, but by 26 April, that figure had risen to 126,000. The graphs below show the impact of the virus has been province-wide. Percentage increases are shown in the lower graph, with a value of around 100% meaning, for example, that claims have effectively doubled in that particular Jobs and Benefits Office.

It should be noted that Universal Credit claims are not a perfect guide to the rate of unemployment. On the one hand, they may overstate the rise because Universal Credit can be claimed for a wider range of reasons than just unemployment, including low income. In normal times, less than 40% of claims are for unemployment, but that proportion is expected to be much higher now. On the other hand, claim numbers may also understate the rise because not all newly unemployed people apply for benefits.⁹ It is possible to apply for Universal Credit if your hours have been reduced. As Universal Credit is means tested, it is also possible to claim for the benefit while being on 80% of wages under the furlough scheme.¹⁰

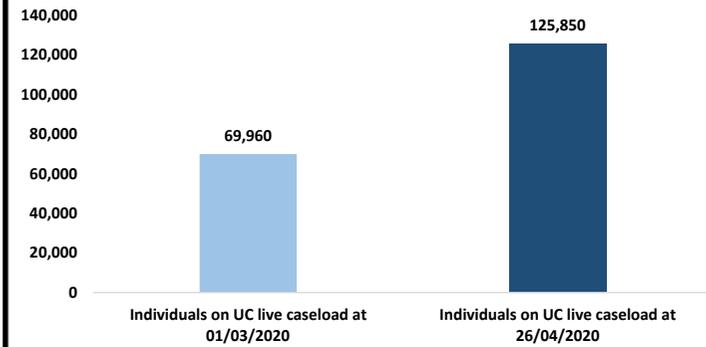
Department for Communities

Universal Credit Claims, Payments and Advances

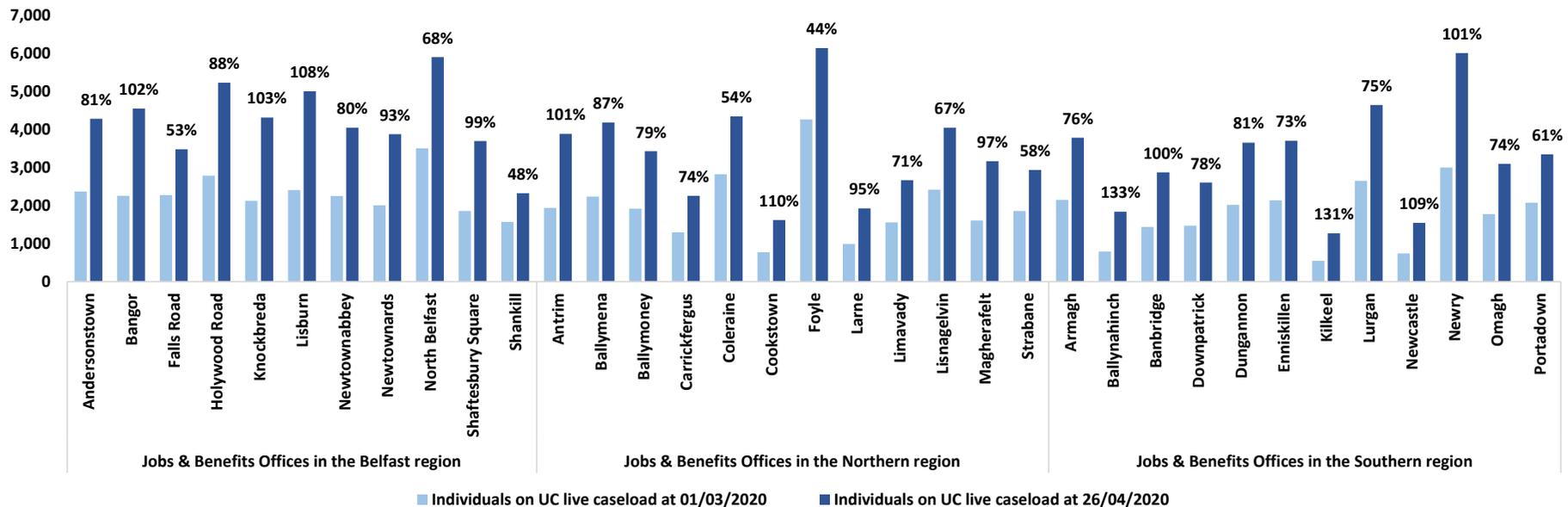
Management Information related to Universal Credit Claims, Payments and Advances from 2 March 2020 to 26 April 2020

Published:
6 May 2020

Totals for Northern Ireland



Universal Credit - Individuals on Live Caseload by JBO



The simultaneous 'shutdown' of many industries for an extended period will lead to an unprecedented recession. A fall in economic activity on this scale will inevitably lead to widespread job losses and while this level of economic damage, both regionally and sub-regionally could be temporary, sometimes it can have a more permanent effect.

There can be longer term human consequences or 'scarring' from a sustained downturn. Many of these can have a significant detrimental impact and so finding a way to safely ease the extent or severity of the current lockdown will serve to ease or release some of those pressures that are accumulating. Those pressures include:

- **Home schooling:** More than a quarter (26%) of those home-schooling strongly or somewhat disagreed they were confident in their ability to home-school their children. More people said home-schooling was negatively affecting the well-being of their child or children than said it was negatively affecting their own well-being¹¹. The quality of teaching will have a human capital impact, and at a population level lower levels of human capital can lead to lower levels of long-term economic growth.
- **Younger workers:** The lockdown is hitting the young much harder than the rest of the workforce: "the under-25s are two and half times as likely as those aged over 25 to work in a sector that has been shut down."¹²
- **Earnings of new graduates:** Those graduating this year can expect to find it harder to find employment and, especially, harder to find well-paid employment than their immediate predecessors, and they can expect to earn less than they might have expected for a considerable period of time.¹³
- **Family life is disrupted:** Many people have been left more isolated and lonely as a result of the outbreak. Recessions bring pressure onto the housing market, mortgage payments and house prices, and these can be particularly destabilising for the relationships of young couples with low family income, high mortgage debt and dependent children.
- **Uncertainty and Investment:** If businesses do not see hope of a recovery, they may decide the less risky option is to cease trading for a number of years, or permanently. If Northern Ireland does not show itself "preparing" to open for business then it could miss out on important investment decisions for new FDI.
- **Mental health:** Nearly one in four (23.9%) of those whose well-being has reportedly been affected said it was making their mental health worse.¹⁴ Data shows that more than twice as many disabled adults (8.3%) as non-disabled adults (3.6%) said they often or always felt lonely.¹⁵ The main reasons cited by disabled adults for their well-being concerns during the COVID-19 pandemic were feeling worried about the future and being stressed, anxious or bored. Economic downturns generally are bad for mental health – it is estimated that the 2009 financial crash led to more than 10,000 extra suicides in Europe and North America.¹⁶
- **Physical health:** Public services have also been impacted, those include a variety of health services with many operations cancelled and vital services like dentistry stopped, and this too will have consequences¹⁷. Potential patients staying away from hospitals risk storing up long-term problems for the future if not being diagnosed.
- **Working from home:** According to the ONS, almost half (49.2%) of adults in employment said they were working from home¹⁸. Much of this has occurred almost overnight, reacting to the crisis and research indicates that working from home is not optimal for many industries / tasks and may not be as productive.¹⁹

Finding effective ways to safely ease the extent or severity of the current lockdown would also ease the pressure on public finances. There are obvious consequences for employment and insolvencies, and the taxes that they generate, if the schemes end prematurely. But there are also consequences as the months pass and the schemes continue to absorb a huge amount of public funding:

- UK public debt is projected to increase from 80% of GDP to 95% of GDP in one year. The burden to repay this will fall on future generations by way of greater taxation or further austerity. Analysis suggests that the JRS alone will cost £40bn in its first three months of operation. That is a huge amount of borrowing for a damage limitation policy, which of course comes with an opportunity cost in terms of a wide range of potential productive uses.
- Revenue generated from taxes and rates are required to fund public services. High quality public services will become less sustainable with a reduction in the base of economic activity that is needed to support them.

SUMMARIES OF UK & ROI STRATEGIES / ROADMAPS

The UK Government's COVID-19 Recovery Strategy

On 10 May 2020 the Prime Minister Boris Johnson addressed the nation on coronavirus. Starting from the following day, some limited relaxation of the Social Distancing measures would take place across England. This formed the first steps of a plan to a destination of economic normality, however, these steps were conditional:

*“Both to beat the virus and provide the first sketch of a road map for reopening society. A sense of the way ahead, and when and how and on what basis we will take the decisions to proceed.....”*²⁰

*“.....Because although we have a plan, it is a conditional plan. And since our priority is to protect the public and save lives, we cannot move forward unless we satisfy the five tests.”*²¹

The five tests are summarised as follows:

1. Sufficient critical care capacity across the UK;
2. Sustained and consistent fall in daily deaths;
3. Rate of infection decreasing;
4. Testing and PPE able to meet demand;
5. Adjustments to measures will not risk a second peak that will overwhelm the NHS.

Although progress will depend on assessments of infection rates (with a 5-Stage Coronavirus Alert Level), the UK Government's first steps to ease lockdown restrictions in England are built initially around three steps over the next few months.

On 11 May 2020, the UK Government published a 50+ page *Our plan to Rebuild: The UK Government's COVID-19 Recovery Strategy* document, which sets out the steps that will gradually be taken to achieve economic recovery.²² The document also points out the health and economic rationale for a gradual change in policy.

Unemployment is rising from a 40-year low at the start of the year; and around 1.8 million households made claims for Universal Credit between 16 March and 28 April. The OBR has published a 'reference' scenario which suggests that, if the current measures stay in place until June and are then eased over the next three months, unemployment would rise by more than 2 million in the second quarter of 2020. The OBR's scenario suggests that GDP could fall by 35% in the second quarter of this year – and the annual contraction could be the largest in over 300 years.

Workers in those sectors most affected, including hospitality and retail, are more likely to be low paid, younger and female. Younger households are also likely to be disproportionately hit in the longer term, as evidence suggests that following recessions, lost future earnings potential is greater for young people.

The longer the virus affects the economy, the greater the risks of long-term scarring and permanently lower economic activity, with business failures, persistently higher unemployment and lower earnings. This would damage the sustainability of the public finances and the ability to fund public services including the NHS. It would also lead to worse long-run physical and mental health outcomes, with a significant increase in the prevalence of chronic illness.

These steps that are expected to be taken by the UK Government (and applicable in England) are summarised below:

STEP 1: MONDAY 11 MAY 2020

- Social distancing measures continue
- Work from home if you can
- Some industries, such as construction and engineering, are encouraged to go to work if safety measures are in place
- Avoid public transport if possible
- Take unlimited amounts of outdoor exercise
- Drive to do exercise if you want
- Play sports but only with your household
- Enjoy parks without having to exercise

WEDNESDAY 13 MAY

STEP 2: MONDAY 1 JUNE AT THE EARLIEST

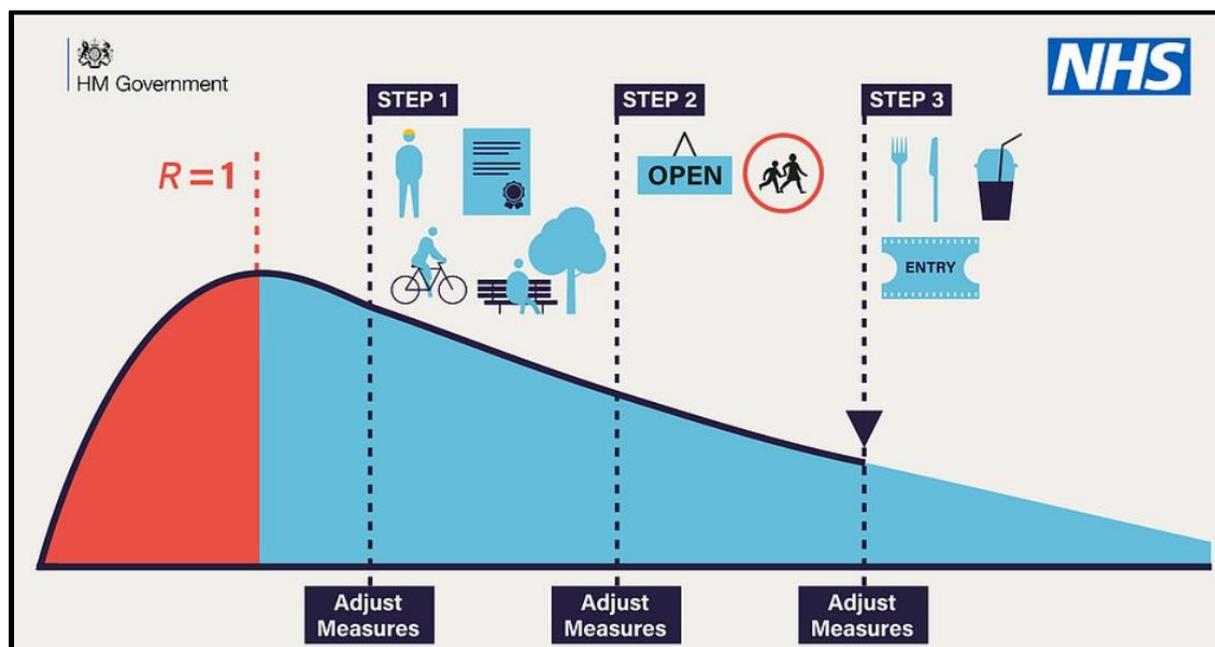
- Phased reopening of shops
- Schools could begin phased reopening (process will begin with reception, Year 1 & Year 6. Years 10 & 12 may get some time with teachers before the summer holidays).

STEP 3: WEDNESDAY 1 JULY AT THE EARLIEST

- Reopening of some of the hospitality industry
- Reopening of public places.

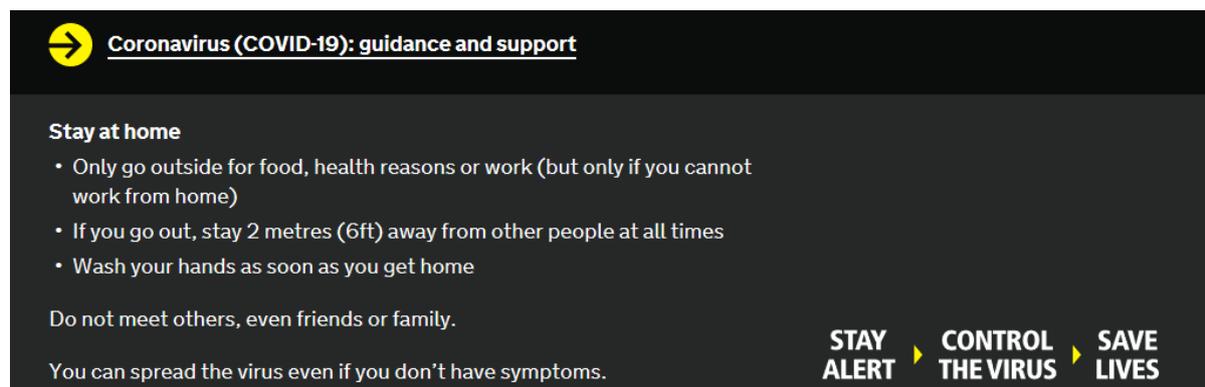
Emphasis is placed on the gradual and incremental nature of the steps, with the Prime Minister stating that if we can't make the changes by the dates outlined, and if the alert level won't allow it, "we will simply wait and go on until we have got it right." ²³ The scientific advice is clear that there is scope to go backwards; as restrictions are relaxed, if people do not stay alert and diligently apply those still in place, transmissions could increase, R would quickly tip above one, and restrictions would need to be re-imposed.

HM Government graphic of three steps to gradually relax social distancing measures



In terms of communication, the message has evolved slightly – from Stay at Home, Protect the NHS, Save lives, to Stay Alert, Control the Virus, Save Lives.

New Coronavirus communication message from HM Government



The image shows a dark-themed banner with a yellow arrow icon pointing right. The text reads: "Coronavirus (COVID-19): guidance and support". Below this, it says "Stay at home" followed by three bullet points: "Only go outside for food, health reasons or work (but only if you cannot work from home)", "If you go out, stay 2 metres (6ft) away from other people at all times", and "Wash your hands as soon as you get home". It then states "Do not meet others, even friends or family." and "You can spread the virus even if you don't have symptoms." On the right side, there are three white text elements: "STAY ALERT", "CONTROL THE VIRUS", and "SAVE LIVES", each with a small yellow arrow pointing right.

Wales and Scotland

People will be able to exercise outside more than once a day in Wales and some garden centres are set to reopen, First Minister Mark Drakeford has said. Announcing only "modest" changes to the coronavirus lockdown, Mr Drakeford warned it was "too soon" to go further. The rest of the stay-at-home restrictions will be extended for another three weeks until 28 May.²⁴

Scotland have removed the once-a-day exercise limit. The First Minister stressed that the advice to businesses in Scotland had not changed. Nicola Sturgeon emphasised "*I am not, at this stage, asking anybody who is not working to go back to work, although we have said we are looking, with priority, at the construction sector, the retail sector and the manufacturing sector*".²⁵

Republic of Ireland Roadmap

The Irish Government has been working with a range of Departments and stakeholders to draw up a roadmap for modifying restrictions imposed to combat the COVID-19 pandemic.

The purpose of this public health framework approach is to inform a slow, gradual, step-wise and incremental reduction of the current public health social distancing measures, in a risk-based, fair and proportionate way with a view to effectively suppressing the spread of COVID-19 disease while enabling the gradual return of social and economic activity.

The Roadmap is guided by a number of over-riding principles. That is, an approach which is:-

- *Safe* – informed and guided by a public health assessment of risk;
- *Rational* - includes consideration of the social and economic benefits and impacts of any modifications of restrictions and their feasibility;
- *Evidence-informed* – uses all of the data and research available to us to guide thinking;
- *Fair* – ethical and respects human dignity, autonomy and supports equality;
- *Open and transparent* – decisions are clear, well communicated and subject to the necessary checks and balances; and
- *Whole of Society* - based on the concept of solidarity and supporting cohesion as we exit over time

This Roadmap includes 6 stages, which are:

1. A sequence of actions to re-open the economy and society;
2. A decision-making framework for Government;
3. A process for engaging with unions, employers and other representative groups to build a co-operative approach to re-opening workplaces and other facilities;
4. An updated economic policy response;
5. Updated response on other pressing societal concerns; and
6. Travel and international co-operation.

As public health is of paramount importance as is the potential for a resurgence of the virus, the Irish Government's response will be a risk-based approach, considering risk both from the perspective of protecting those most vulnerable to infection as well as protecting against causes, situations, circumstances, and behaviours that may lead to risk of spread of disease.

The National Public Health Emergency Team has been and are continuing to assess the public health risk. They have produced a report that outlines 5 phases and the triggers which will allow Irish society to progress from one phase to the next.

The Irish Government has accepted the recommendations of the NPHE and the overall framework provided. The details for a phased reduction of restrictions are as follows.

Based on a 3 week review process, the current phases would commence on the following date:	
Phase 1	18 th May
Phase 2	8 th June
Phase 3	29 th June
Phase 4	20 th July
Phase 5	10 th August

Phase 1

Community Health Measures

- Wearing of face coverings in public, with strict social distancing in place
- Avoidance of unnecessary journeys and visiting
- Up to 4 people can meet outdoors
- Maximum of 10 people of close relation at funerals

Education & Childcare Measures

- Registered childcare works can provide support in an essential healthcare worker's home
- Opening of school buildings for access by teachers for distribution of remote learning

Health & Social Care Services Measures

- Across phases 1 and 2 increase delivery of non-COVID-19 care and services alongside COVID-19 care to meet demand.

Economic Activity (Work)

- Permit phased return of outdoor workers. Social distancing required.
- Continuation of remote working where possible.

Retail, Personal Services & Commercial activities

- Open Retail outlets that are primarily outdoors
- Retailers to develop plan for safe operation

Cultural & Social Measures

- Open outdoor public amenities, sports amenities and tourism sites where people are non-stationary and can abide by a 2m social distance
- Outdoor sporting and fitness activities allowed where social distancing can be maintained.

Phase 2

Community Health Measures

- Wearing of face coverings in public, with strict social distancing in place
- Avoidance of unnecessary journeys
- Extension to <20km of home restriction
- Designation of specific retail hours for vulnerable
- Short visits of up to 4 people to vulnerable or another household, maintaining strict social distancing

Retail, Personal Services & Commercial activities

- Open small retail outlets where numbers can be controlled
- Open marts where social distancing can be maintained

Cultural & Social Measures

- Open public libraries with numbers limited, with strict hygiene and social distancing measures
- Outdoor sporting and fitness activities of small teams/groups allowed where social distancing can be maintained

Transport & Travel

- Actively restrict & monitor travelling to ensure social distancing compliance

Phase 3

Community Health Measures

- Avoidance of unnecessary journeys
- Maintain <20km home restriction

Education & Childcare Measures

- Opening of crèches, childminders and pre-schools for children of essential workers

Health & Social Care Services Measures

- Phased approach to visiting at hospital/residential healthcare centre/prisons etc.

Economic Activity (Work)

- Permit phased return of workers, that can due to the nature of work can maintain a constant 2m social distance
- Continuation of remote working where possible.
- Organisations to develop plans for return to onsite working.
- State to develop mechanism for supporting, advising, assessing, regulating planning for return to onsite working by organisations.

Retail, Personal Services & Commercial activities

- Phased opening of all other non-essential retail outlets where social distancing can be maintained. Limited to outlets with street-level entry/exit i.e. not shopping centres.

Cultural & Social Measures

- Open playgrounds where social distancing and hygiene can be maintained
- Permit 'behind close doors' sporting activities where participants can maintain social distancing
- Open cafes and restaurants providing they can comply with social distancing and strict hygiene measures

Transport & Travel

- Restrictions of travel to be considered to and in major urban centres (i.e. restriction on no. of private cars)

Phase 4

Community Health Measures

- Extend travel to outside your region
- Increase in number of visitors to another household for a short time, while maintaining social distancing
- Small social gatherings by family and close friends limited to a maximum number of attendees for a limited period of time where social distancing can be maintained (e.g. small weddings, baptisms)

Education & Childcare Measures

- Gradual opening (one day per week) of crèches, childminders and pre-schools for children of all other workers. Slowly increasing thereafter.

Economic Activity (Work)

- Organisations where employees cannot remote work to be considered for first return to work.
- Shift/staggered work hours should be operated where appropriate.
- Continuation of remote working where possible.

Retail, Personal Services & Commercial activities

- Loosening of restrictions on higher risk services involving direct physical contact for people and which there is a population wide demand (i.e. hairdressers, barbers)

Cultural & Social Measures

- Open museums, galleries and other cultural outlets where people are non-stationary. Strict social distance and hygiene measures must be in place
- Open religious and places of worship where social distancing can be maintained
- Permit Sport team leagues but only where social distancing and limitations on spectators are in place
- Open public swimming pools where social distancing and effective cleaning can be carried out
- Opening of hotels, hostels, caravan and holiday parks for social and tourist activities on a limited occupancy basis, increasing this over time. Hotel bars remained closed

Transport & Travel

- Progressively decrease restrictions on numbers travelling in urban areas

Phase 5

Community Health Measures

- Continue to restrict all household contact of suspect cases (await test results or 14 days isolation)
- Large social gatherings (e.g. large weddings to be restricted due to risk)

Education & Childcare Measures

- Opening on a phased basis at the beginning of the academic year 2021/21
 - Primary & Secondary schools
 - Universities, 3rd level and adult education centres

Health & Social Care Services Measures

- Return to normal visiting at hospital/residential healthcare centre/prisons etc.

Economic Activity (Work)

- Phased return to onsite working arrangement
- 'High risk' organisations which cannot maintain social distancing, plan for how they can eventually return to onsite work

Retail, Personal Services & Commercial activities

- Opening of enclosed shopping centres where social distancing can be maintained
- Further loosening of restrictions on higher risk services involving direct physical contact for people and which there is a population wide demand

Cultural & Social Measures

- Open theatres and cinemas where social distancing can be maintained
- Permit close physical contact sports
- Open gyms, exercise, dance studios and sports clubs, where effective cleaning and social distancing is in place
- Permit spectators at sports involving mass gatherings only in accordance with number restrictions and social distancing
- Open indoor recreational venues (i.e. bingo halls, bowling alleys, pubs, bars, nightclubs) where numbers can be limited, cleaning can be maintained and social distancing can be complied with.
- Festivals, events and other social & cultural events permitted only in accordance with number restrictions and social distancing measures

Transport & Travel

- Resume tourist travel to offshore islands by non-residents

It is recognised that there may be emergency needs arising in a number of areas, the following retailers who can offer an emergency call-out or delivery service can continue to operate on that basis ONLY:

- opticians/optometrists
- retailers involved in the repair of motor vehicles, motorcycles and bicycle repair and related facilities (tyre sales and repairs for example)
- hardware stores, builder's merchants and stores that provide hardware products necessary for home and business maintenance, sanitation and farm equipment, supplies and tools essential for gardening/farming/agriculture
- retail sale of office products and services for individuals working from home and for businesses
- retailers providing electrical, IT and phone sales, repair and maintenance services for home.²⁶

Engagements and cooperation towards relaxing lockdown measures

The Irish Government has mentioned close cross-border coordination, and stated this will continue, and intensify, over the coming weeks as they move to reopen both business and society. Further, given the very close links between Ireland and Great Britain, there is also strong engagement between the Irish and British Governments. As with Northern Ireland, this engagement takes place at a number of levels, both politically and officially.

DfE SUMMARY OF STRATEGY / ROADMAP BY UK & ROI GOVERNMENTS

Week Commencing		United Kingdom	Republic of Ireland			
Quarter 1	Jan	06/01/2020 13/01/2020 20/01/2020 27/01/2020	<p>First case of Covid-19 (York)</p> <p>First case of Coronavirus in Rol.</p> <p>Taoiseach announces that schools, colleges and childcare facilities will close.</p> <p>Taoiseach announces "unprecedented actions" to curb the spread of Covid-19.</p>			
	Feb	03/02/2020 10/02/2020 17/02/2020 24/02/2020				
	Mar	02/03/2020 09/03/2020 16/03/2020 23/03/2020 30/03/2020				
	Quarter 2	Apr		06/04/2020 13/04/2020 20/04/2020 27/04/2020	<p>The National Public Health Emergency Team confirms that more than half the victims (156) in Ireland were nursing home residents (54%).</p> <p>Rol Government publishes roadmap to ease COVID-19 restrictions.</p> <p>PHASE 1. Permit phased return of outdoor workers. Social distancing required. Open retail outlets that are primarily outdoors</p> <p>PHASE 2. Open small retail outlets where numbers can be controlled. Open marts. Open public libraries. Extension to <20km of home</p> <p>PHASE 3. Permit phased return of workers, that can due to the nature of work can maintain a constant 2m social distance.</p> <p>PHASE 4. Extend travel to outside your region. Loosening of some restrictions on hairdressers, barbers etc. Opening of hotels, hostels, caravan and holiday parks for social and tourist activities on a limited occupancy basis.</p> <p>PHASE 5. Opening on a phased basis at the beginning of the academic year 2021/21 - Primary & Secondary schools, Universities etc.</p>	
		May		04/05/2020 11/05/2020 18/05/2020 25/05/2020		
		Jun		01/06/2020 08/06/2020 15/06/2020 22/06/2020 29/06/2020		
		Quarter 3		Jul		06/07/2020 13/07/2020 20/07/2020 27/07/2020
				Aug		03/08/2020 10/08/2020 17/08/2020 24/08/2020 31/08/2020
				Sep		07/09/2020 14/09/2020 21/09/2020 28/09/2020
Quarter 4			Oct	05/10/2020 12/10/2020 19/10/2020 26/10/2020		
			Nov	02/11/2020 09/11/2020 16/11/2020 23/11/2020 30/11/2020		
			Dec	07/12/2020 14/12/2020 21/12/2020 28/12/2020		

Historic Events | Roadmap of Future Measures

SECTORAL CONSIDERATIONS IN NORTHERN IRELAND

This section is focussed solely on the characteristics of economic sectors in Northern Ireland. Looking at the characteristics of each economic sector allows an indication of the risk level associated with a move towards relaxing lockdown measures. However, this research / exploration does not seek to override critical health considerations. Indeed, the risks of easing lockdown measures too soon are obvious, not only for public health but also for the economy. A world with no lockdown and a pandemic spreading rapidly through the population does not make for a healthy economy, nor does a world in which containment measures have to be repeatedly reinstated after being eased prematurely or in suboptimal ways.

When sectors start to go back to work, employers must institute health and behavioural protocols to lower the potential for further transmission. In almost every sector, businesses will need protocols to maintain physical distancing and prevent a resurgence of new cases: remote work, hygiene and health-oriented guidelines, frequent monitoring of people's temperatures for early detection of new cases, reporting of relevant information to the health authorities, and enforcement measures to guarantee compliance. There may also be a need to consider how employees travel to work.

Additionally, each sector and subsector may need to implement specific requirements and procedures to guarantee the health of workers and the rest of the community. The figure below illustrates general and sector-specific protocols to restart operations. These recommendations are based on research by McKinsey - Public Sector Practice: how to restart national economies during the coronavirus crisis.²⁷

Protocols for safety and health are essential in every sector – McKinsey Report

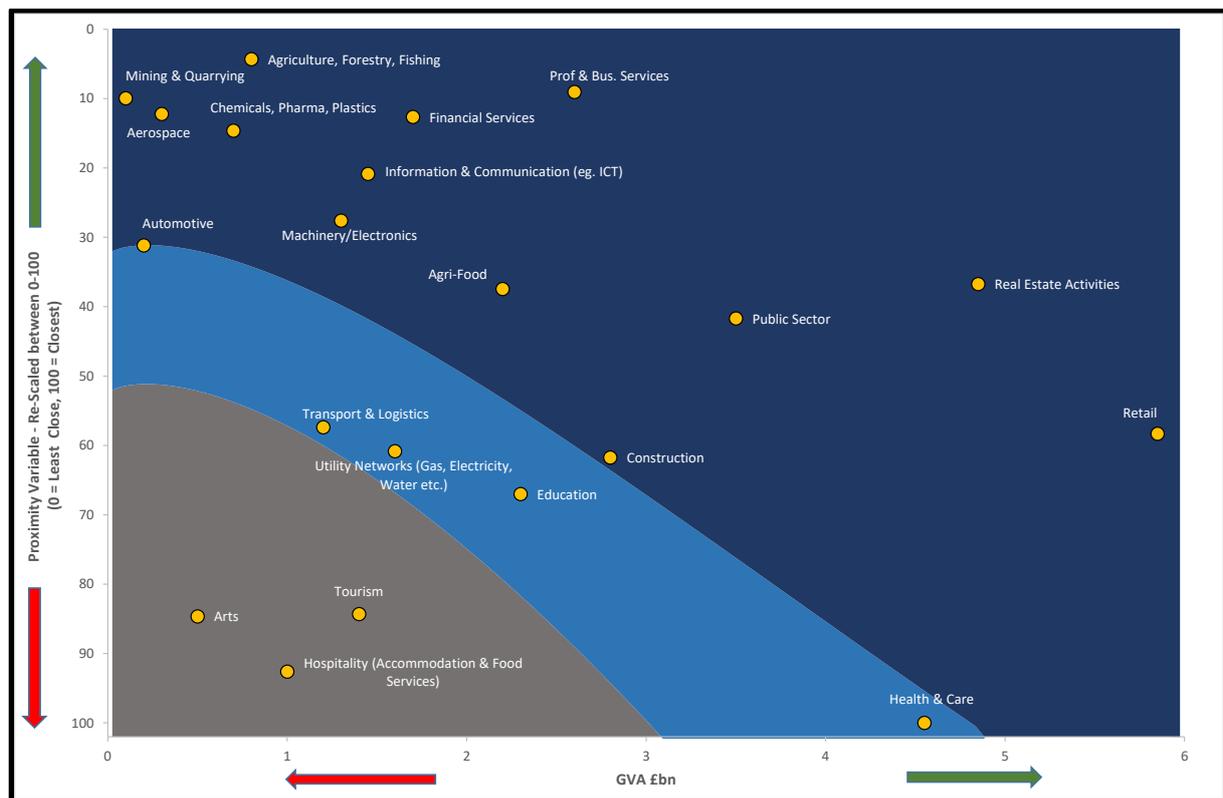
Illustrative measures		Sector-specific protocols: Retail ¹
Cross-cutting measures¹		
Remote working	<ul style="list-style-type: none"> Encourage remote work for the next 3–6 months Create remote-work policies that offer employees productivity incentives 	<ul style="list-style-type: none"> Implement communication and marketing campaigns to encourage e-commerce Implement tax exemptions to e-commerce Alternate remote work with face-to-face work as much as possible, especially for administrative staff Restrict maximum capacity of stores on per square meter basis Ensure that all large meetings are held online Set differentiated work shifts (eg, days, nights, weekends, holidays) for administrative staff Set differentiated check-in, food, and check-out times Create a carpooling scheme for employees in order to prevent them from moving by public transport Extend opening times or commercial establishments Set specific hours to serve high-risk population
Physical distancing	<ul style="list-style-type: none"> Ensure a minimum distance of 1.5 meters between two people¹ Define regulation to establish maximum capacity in closed places Suspend any in-person events that congregates more than 25 people 	
Temperature and control	<ul style="list-style-type: none"> Monitor people's temperature in all buildings and shops daily Request employee quarantine when the slightest COVID-19 symptom shows up 	
Health and hygiene	<ul style="list-style-type: none"> Establish daily disinfection procedures Promote mandatory health and hygiene protocols for employees (eg, washing hands, wearing masks and gloves) 	
Reporting	<ul style="list-style-type: none"> Report to relevant health authorities of any case with COVID-19 symptoms Report the chain of contagion to relevant health authorities 	
Enforcement	<ul style="list-style-type: none"> Perform random checks across sectors to ensure compliance Impose fines in cases of noncompliance 	
<small>¹ All of these protocols should be clearly defined by local authorities based on their context and needs.</small>		

It is essential to assess both the risk to social distancing and the relative economic importance of each sector to identify those sectors of the economy that could be restarted the earliest.

This quantitative approach positions three sectors as potential candidates for consideration of increased activity at the appropriate stage. These are the construction, retail and manufacturing sectors.

The chart below maps the economic importance of the sectors (using approximate Gross Value Added (GVA)⁹ in £bn as a metric of the contribution to the Northern Ireland economy against the risk to social distancing, which is displayed by the extent that a sector requires employees to perform tasks in close physical proximity to other people.^{10 11}

Northern Ireland’s Economic Sectors, their size, and general proximity to people



It would be much more preferable for a gradual and managed working from home / flexible working approach being taken by businesses. Unfortunately, much of the recent surge has occurred almost overnight, reacting to the crisis and research indicates that working from home is not optimal for many industries / tasks and may not be as productive.²⁸ ASD have

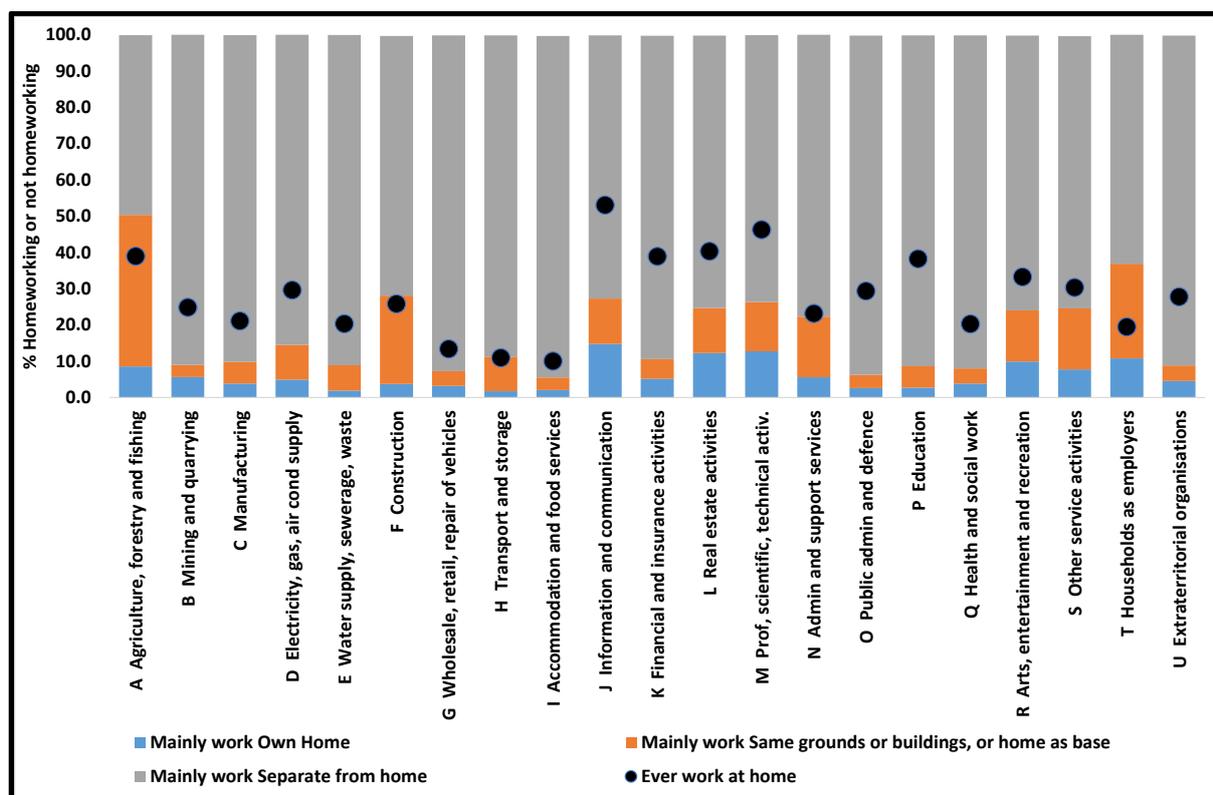
⁹ Data is intended to be indicative of the sector size, and some of the data is from alternative sources and years; therefore in some cases overlaps or omissions are possible at the sectoral / sub-sectoral level. For example, Tourism output is already captured within the GVA of some other sectors and is only shown for indicative purposes only. It should also be noted for example, that Professional & Business Services is a subset of sectors (with greater combined output than shown above).

¹⁰ <https://www.onetonline.org/find/descriptor/result/4.C.2.a.3>

¹¹ The proximity values displayed on the y-axis (vertical) show the average level across each sector – with each individual occupation within each industry being accounted for. The values range depending on the occupations within each industry. For example in the Health sector, a dentist will see patients face-to-face in his room, whereas a medical equipment repair technician may not need to be within close proximity with others to do their job and complete a task. Similarly, in the Arts sector, choreographers will have a high level of contact with other people, while painters or sculptors will have low proximity. Some industries such as Mining & Quarrying are quite capital intensive, so may rely less upon large groups of workers to produce.

produced the graph below, which shows (using ONS data) the percentage of workers who tend to work from home.

Homeworking in the UK (by ASD, using ONS data) ²⁹

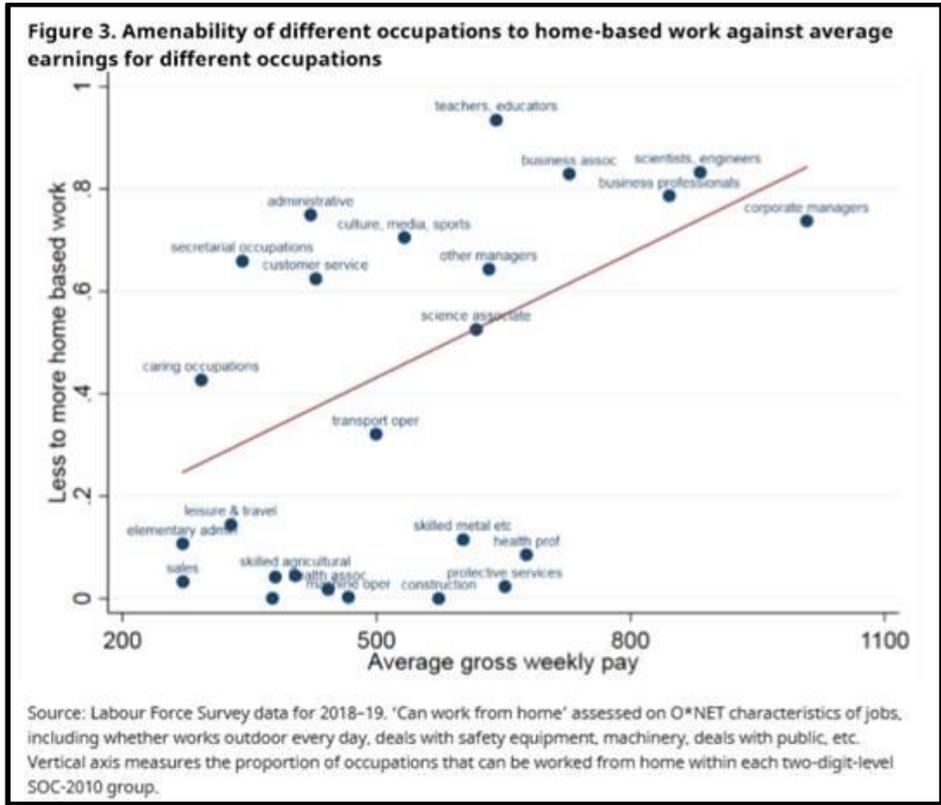


As expected, Agriculture, forestry and fishing have a relatively high proportion of workers who use the same grounds or buildings, or home as a base. Perhaps also expected, education, construction and manufacturing are amongst the industries which have relatively low numbers of workers who say they “mainly work at own home”.

In a later survey than the above graph, 45% of adults in employment said they had worked from home at some point this week (ONS - Coronavirus, the UK economy and society, faster indicators: 30 April 2020). This consisted of 39% that had only worked from home and 6% that had both worked from home and travelled to work (both key workers and non-key workers). A further 26% of adults in employment said they had travelled to work in the last seven days and had not worked from home. Of all employed adults, 30% had neither worked from home nor travelled to work; the reason for this is not known but could be because of the person being on leave, sick leave, furloughed or being off-shift during the reference seven days.³⁰

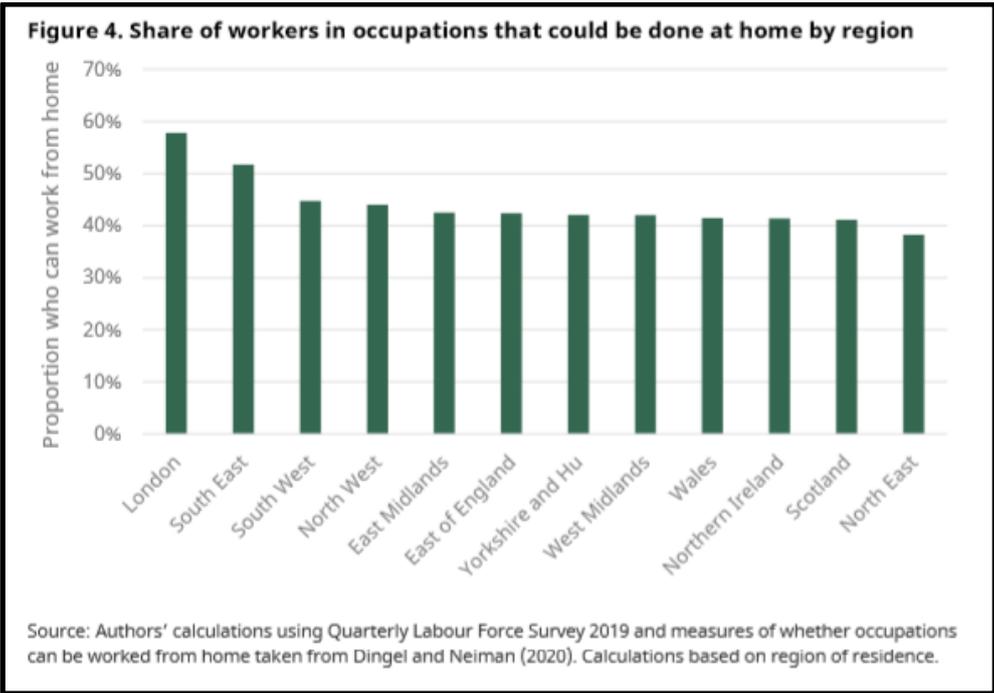
The dots in the graph above show the proportions of people in each industry that have “ever worked at home”. Perhaps in a unique situation such as this, there could be greater scope for accelerating the trend to greater home working.

The figure below³¹ shows occupation-level estimates of the degree to which workers might be able to work from home, against average earnings in that occupation, at a UK level.



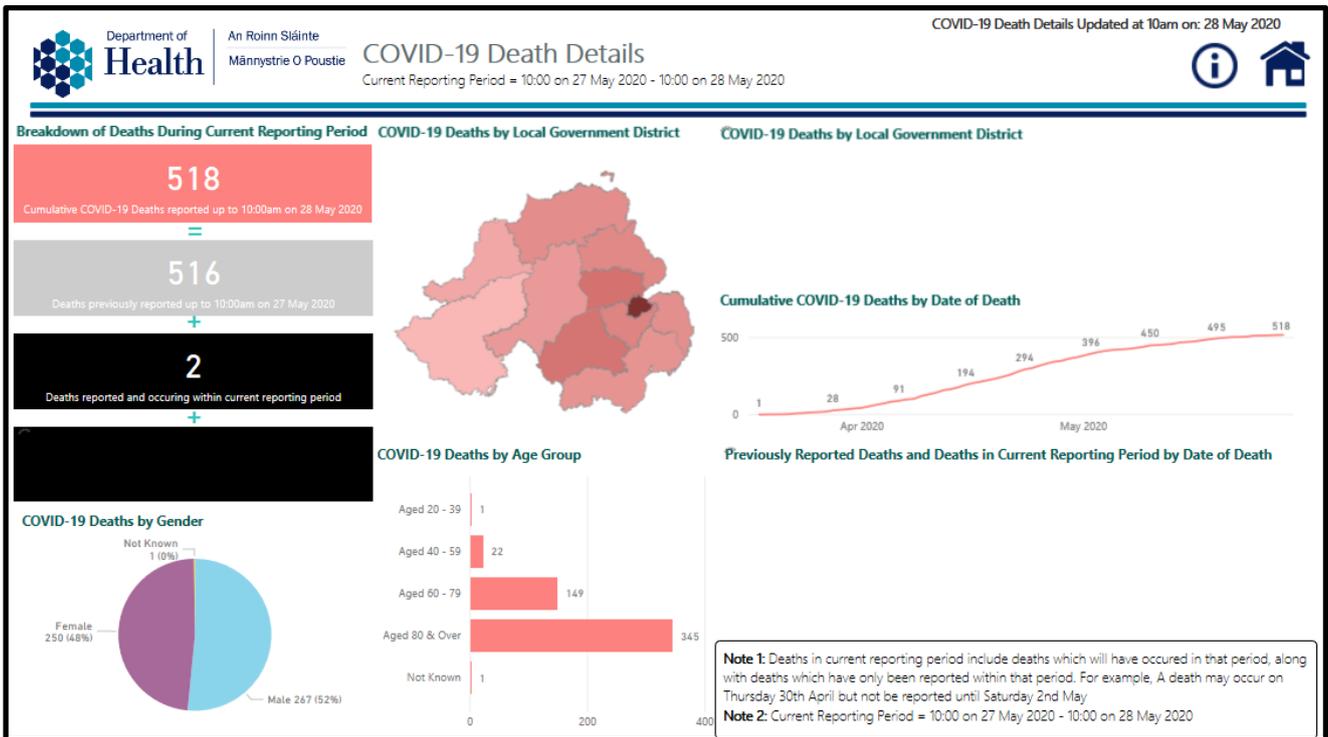
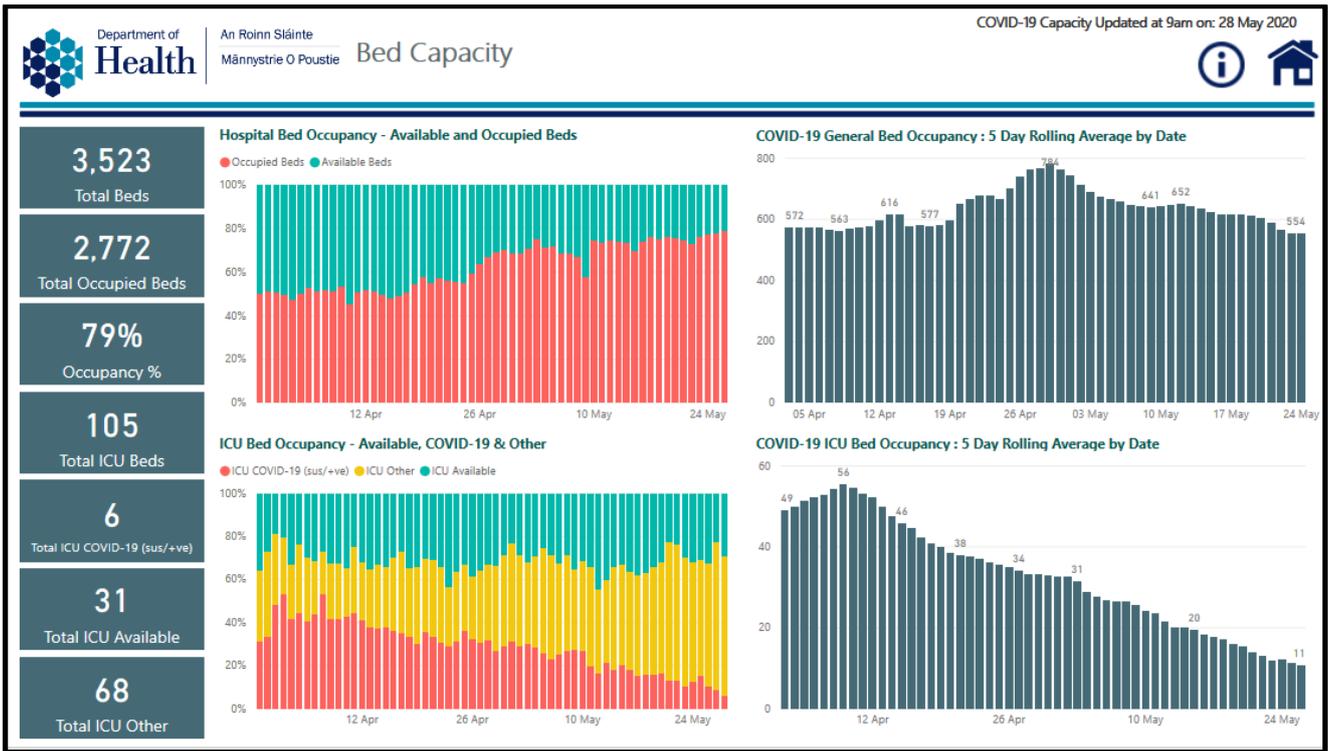
The indication from the chart is that jobs that necessarily involve working with machinery, close contacts with customers or working outside will not be amenable to home working, all else equal. On the other hand, many desk-based occupations such as legal work, management and computer programming (shown towards the top of the graph) will be. It also demonstrates that lower-paid jobs are less likely to be amenable to working from home.

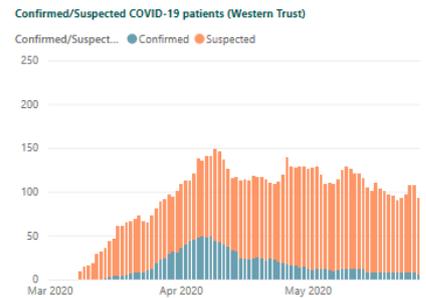
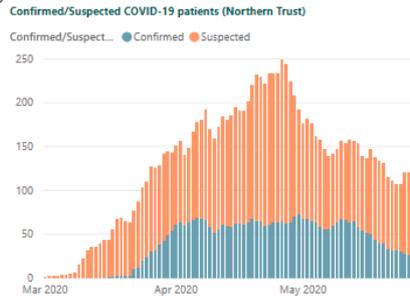
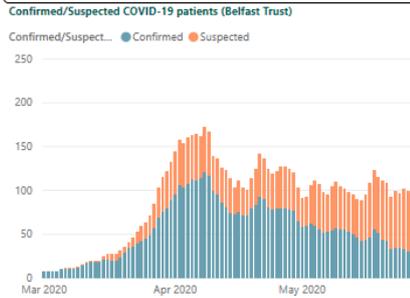
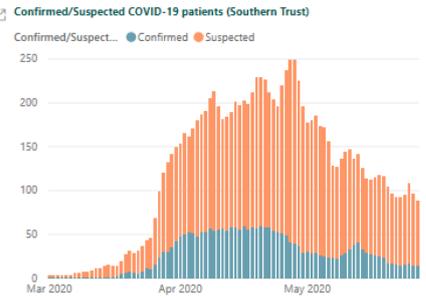
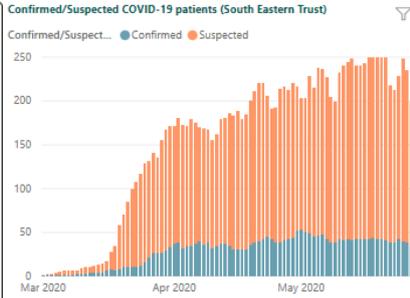
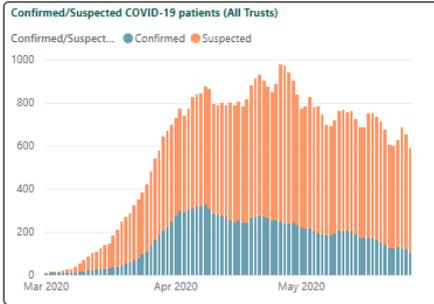
The figure below³², meanwhile, indicates the share of workers in occupations that could be done at home by UK region. Despite having one of the lowest shares, if 41% of Northern Ireland’s employed population worked from home, this would allow for better social distancing measures to be maintained while the economy reopens.



Changing the way that firms operate would also be necessary, especially in the short-run before any vaccine has been fully developed. Some types of face-to-face communication can be replaced by online meetings. Retail shops and restaurants that traditionally required close contact with customers have already shifted to click-and collect or take-away. New software has allowed pharmacists to easily transfer information between them, minimising the cost of workers working non-overlapping hours and requiring less face-to-face contact. Construction sites are assigning workers to a small, consistent team which alternates shifts with other teams.

APPENDIX A: DEPARTMENT OF HEALTH DATA 33





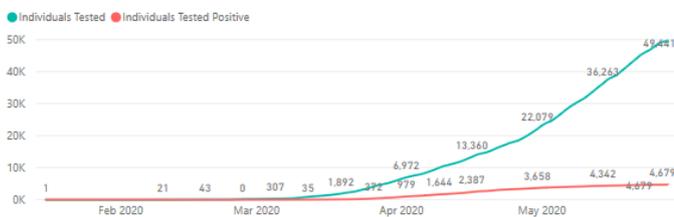
The information below shows the total number of laboratory completed tests for SARS-COV2 Virus at 9am on the date presented. The total number of tests will include each laboratory completed test, i.e. if an individual had more than one test for the SARS-COV2 Virus, each laboratory completed test will be included.

Cumulative Total of Laboratory Completed Tests by Date of Laboratory Test

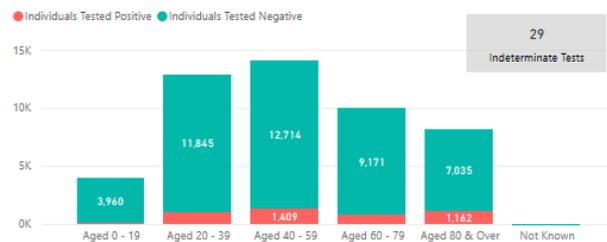


The cumulative number of individuals with a laboratory completed test is presented below by the date on which the specimen (sample / swab) had been taken at a testing location, and not the date the laboratory test was completed. If an individual has been tested more than once, only the first laboratory completed positive result will be counted, with all other laboratory completed test results excluded, regardless of when the test took place.

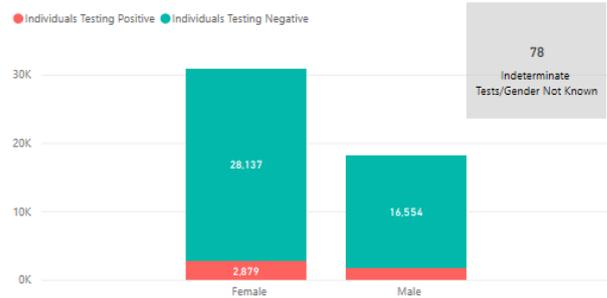
Cumulative Individuals with Laboratory Completed Test for SARS-COV2 Virus by Date of Specimen

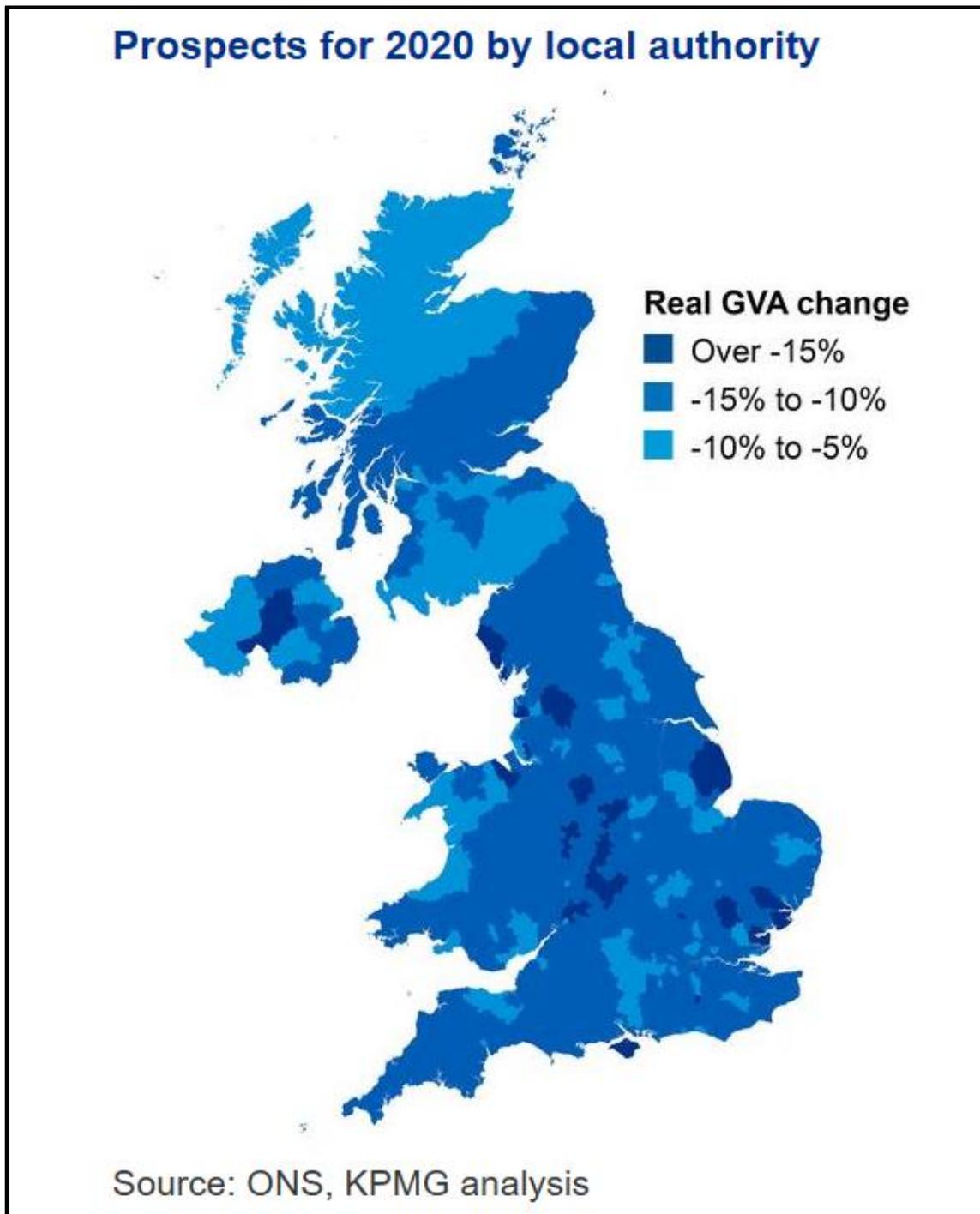


Individuals with a Laboratory Completed Test for SARS-COV2 Virus by Age Group



Individuals with a Laboratory Completed Test for SARS-COV2 Virus by Gender





APPENDIX C: HM GOVERNMENT GRAPHICS ON THE FIVE TESTS AND ALERT LEVELS

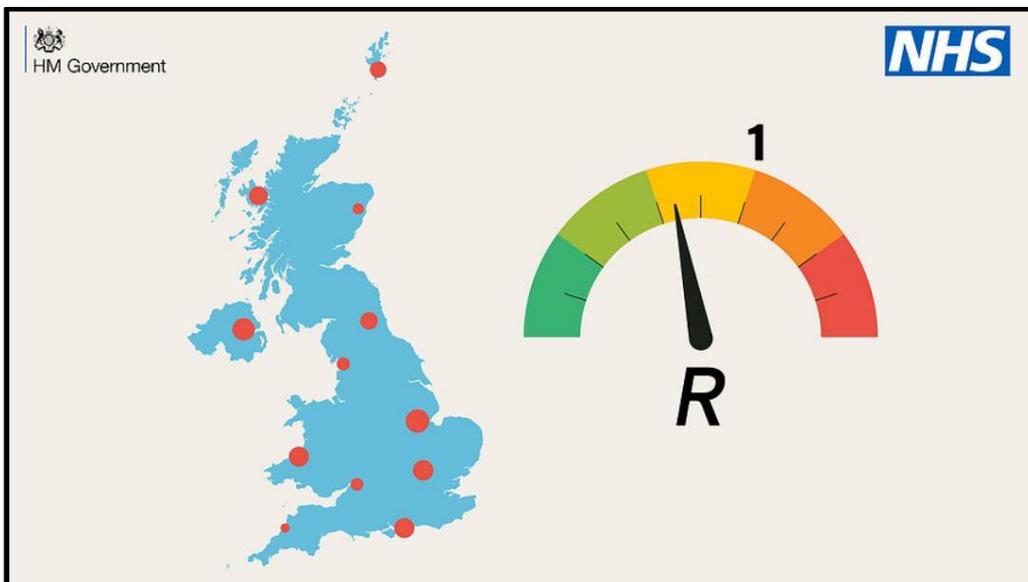
1. Sufficient critical care capacity across the UK

2. Sustained and consistent fall in daily deaths

3. Rate of infection decreasing

4. Testing and PPE able to meet demand

5. Adjustments to measures will not risk a second peak that overwhelms the NHS



COVID Alert Levels

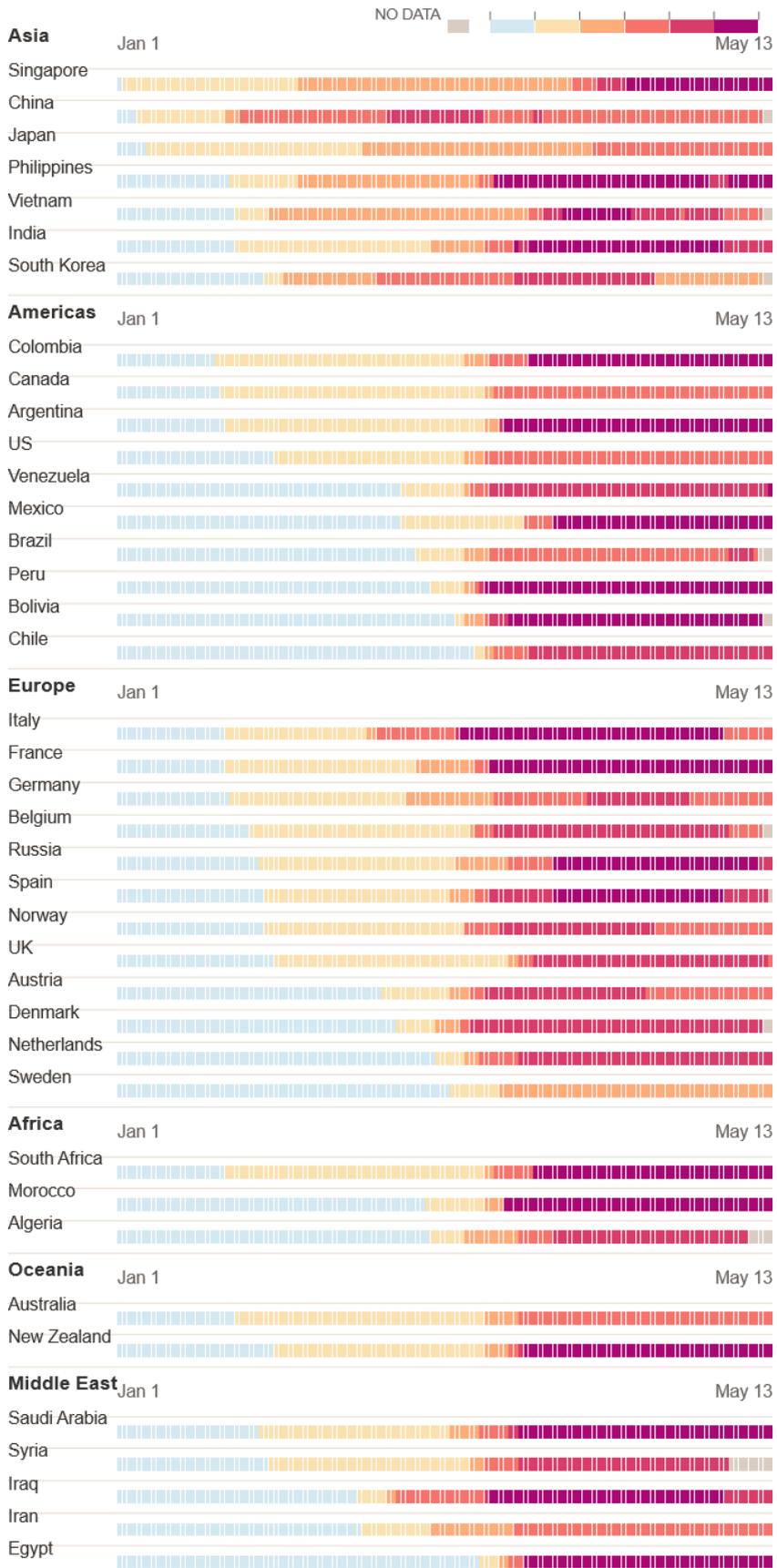
Level	Description	Action
5	As level 4 and there is a material risk of healthcare services being overwhelmed	Social distancing measures increase from today's level
4	A COVID-19 epidemic is in general circulation; transmission is high or rising exponentially	Current social distancing measures and restrictions
3	A COVID-19 epidemic is in general circulation	Gradual relaxing of restrictions and social distancing measures
2	COVID-19 is present in the UK, but the number of cases and transmission is low	No or minimal social distancing measures; enhanced testing, tracing, monitoring and screening
1	COVID-19 is not known to be present in the UK	Routine international monitoring

STAY ALERT » CONTROL THE VIRUS » SAVE LIVES

APPENDIX D: STRINGENCY INDEX - OXFORD UNIVERSITY

Global responses to the pandemic

Oxford Covid-19 government response stringency index



Graphic: Max Harlow, Caroline Nevitt and Aleksandra Wisniewska
Source: Blavatnik School of Government, University of Oxford
© FT

Overview of Reopening Phases

Commencing May 18th



Coronavirus
COVID-19
National Programme

1
(Commencing 18th May)

2

3

4

5

Community Health



5km travel limit.
Avoid unnecessary journeys.
Small groups meet outdoors.

5km to 20km.
Avoid unnecessary journeys.
Retail hours and visits for cocooners.
Short home visits in small groups
Easing of funeral restrictions.

5km to 20km.
Avoid unnecessary journeys.

Travel beyond home area
Short but slightly larger home visits.
Small social gatherings (e.g. small weddings, baptisms).

Travel beyond home area
Some larger social gatherings (e.g. weddings).

Education & Childcare



Childcare for essential healthcare workers.
Opening of schools and colleges for teachers.

Childcare for essential healthcare workers.
Opening of schools and colleges for teachers.

Phased opening of crèches and pre-schools for children of essential workers.

Phased opening of crèches, childminders and pre-schools for all.

Schools, 3rd level and adult education centres opening on a phased basis for 2020/21 academic year.

Economic Activity & Work



Phased return of outdoor workers
Remote working continues for all that can do so.

Limited return to onsite working subject to compliance capability
Remote working continues for all that can do so.

Return to low-interaction work.
Remote working continues for all that can do so.

Return to work where employees cannot remote work.
Staggered hours.
Remote working continues for all that can do so.

Phased return to work across all sectors.
Remote working continues for all that can do so.

Retail, Services & Commercial Activity



Retail that is mainly outdoor + home-ware, opticians, motor, bicycle & repair, office products, electrical, IT, phone sales & repair open.
All subject to social distancing.

Small retail outlets with control of numbers open.
All subject to social distancing.

Open non-essential retail outlets with street level access.

Gradual easing of restrictions on higher-risk services. e.g. Barbers and hairdressers

Further easing of restrictions: higher-risk services. e.g. shopping centres, tattoo, piercing.

Cultural & Social



Open outdoor public amenities, incl. pitches, tennis courts and golf courses, tourism sites, beaches and walks. Outdoor sporting and fitness activities, in groups max. four people, resume
All subject to social distancing.

Open public libraries.
Small group team sports training (not matched) resume.
All subject to social distancing.

Open playgrounds. / Behind closed doors sporting activities. Open cafes and restaurants providing on-premises food & beverages—all subject to social distancing and strict cleaning protocols

Museums, galleries and places of worship re-open. Sports and team leagues (e.g. Soccer & GAA) and swimming pools.
All subject to social distancing.

Pubs, bars, nightclubs, theatres, cinemas and casinos. Close physical contact sports. Open gyms, exercise, dance studios and other indoor and outdoor festivals, events and mass gatherings.

Transport & Travel



Social distancing and hygiene measures continue for public and private transport as passengers increase.
Specific measures at ports and airports.

Numbers restricted and monitored. Social distancing and hygiene measures continue for public and private transport as passengers increase.
Specific measures at ports and airports.

Travel restrictions on numbers travelling to and in major urban centres. Social distancing and hygiene measures continue for public and private transport as passengers increase. Specific measures at ports and airports.

Gradually decrease restrictions in major urban centres. Hotels etc. on a limited occupancy basis re-open. Bars remain closed. Social distancing and hygiene measures continue. Specific measures at ports and airports.

Resume tourist travel to offshore islands. Social distancing and hygiene measures continue for public and private transport as passengers increase. Specific measures at ports and airports.

Criteria for progressing from one phase to the next are:



Progress of disease



Testing and contact tracing



Secondary morbidity and mortality



Healthcare capacity/resilience



Shielding at-risk groups

The details of this phased re-opening of our country are now available on gov.ie
Please stay the course, and please continue to save lives by staying apart.

Supported by the Government of Ireland.



Rialtas na hÉireann
Government of Ireland

Endnotes / Sources

- ¹ <https://www.bankofengland.co.uk/report/2020/monetary-policy-report-financial-stability-report-may-2020>
- ² https://www.ulster.ac.uk/_data/assets/pdf_file/0005/550166/UUEPC-Economic-Consequences-of-COVID19-090420.pdf
- ³ <https://obr.uk/coronavirus-analysis/>
- ⁴ <https://ulstereconomix.com/tag/pmi/>
- ⁵ https://www.ulster.ac.uk/_data/assets/pdf_file/0005/550166/UUEPC-Economic-Consequences-of-COVID19-090420.pdf
- ⁶ <https://www.gov.uk/government/news/chancellor-extends-furlough-scheme-until-october>
- ⁷ <https://www.bbc.co.uk/news/business-52634759>
- ⁸ <https://www.bankofengland.co.uk/-/media/boe/files/monetary-policy-report/2020/may/monetary-policy-report-may-2020.pdf>
- ⁹ <https://www.bankofengland.co.uk/-/media/boe/files/monetary-policy-report/2020/may/monetary-policy-report-may-2020.pdf>
- ¹⁰ <https://www.yourmoney.com/household-bills/does-being-on-furlough-affect-benefits/>
- ¹¹ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/articles/coronaviruscovid19roundup/2020-03-26#businessimpact>
- ¹² <https://www.ifs.org.uk/publications/14806>
- ¹³ <https://www.ifs.org.uk/publications/14816>
- ¹⁴ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandwellbeing/bulletins/coronavirusandthesocialimpactsongreatbritain/23april2020>
- ¹⁵ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/articles/coronaviruscovid19roundup/2020-03-26#businessimpact>
- ¹⁶ <http://www.ox.ac.uk/news/2014-06-12-recession-link-over-10000-suicides-west>
- ¹⁷ According to the IFS: *“More people will die of other conditions over the coming months because the NHS is prioritising coronavirus patients. A lot of them will be elderly, the same group most at risk from coronavirus itself. They also will be disproportionately poor. More people will die in the years ahead as a result of the poverty, unemployment and mental health problems created by the lockdown.”*
- ¹⁸ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/bulletins/coronavirusandtheeconomyandsocietyfasterindicators/23april2020>
- ¹⁹ <https://www.cnn.com/2020/03/12/study-how-working-from-home-boosts-and-hurts-productivity-creativity.html>
- ²⁰ <https://www.gov.uk/government/speeches/pm-address-to-the-nation-on-coronavirus-10-may-2020>
- ²¹ <https://www.gov.uk/government/speeches/pm-address-to-the-nation-on-coronavirus-10-may-2020>
- ²² <https://www.gov.uk/government/publications/our-plan-to-rebuild-the-uk-governments-covid-19-recovery-strategy>
- ²³ <https://www.gov.uk/government/speeches/pm-address-to-the-nation-on-coronavirus-10-may-2020>
- ²⁴ <https://www.bbc.co.uk/news/uk-wales-52584690>
- ²⁵ <https://www.bbc.co.uk/news/uk-scotland-52605959>
- ²⁶ <https://www.gov.ie/en/publication/625292-updated-list-of-essential-retail-outlets-27th-march-2020/#businesses-that-can-only-offer-emergency-call-out-or-delivery-services>
- ²⁷ https://www.mckinsey.com/~/_media/McKinsey/Industries/Public%20Sector/Our%20Insights/How%20to%20restart%20national%20economies%20during%20the%20coronavirus%20crisis/How-to-restart-national-economies-during-the-coronavirus-crisis-vF.ashx
- ²⁸ <https://www.cnn.com/2020/03/12/study-how-working-from-home-boosts-and-hurts-productivity-creativity.html>
- ²⁹ <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/homeworkingintheuklabourmarket>
- ³⁰ <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/conditionsanddiseases/bulletins/coronavirusandtheeconomyandsocietyfasterindicators/30april2020>
- ³¹ https://www.ifs.org.uk/uploads/Final-BN286-Getting-people-back-to-work-final-for-website_.pdf
- ³² https://www.ifs.org.uk/uploads/Final-BN286-Getting-people-back-to-work-final-for-website_.pdf
- ³³ <https://app.powerbi.com/view?r=eyJrIjoiZGYxNjYzNmUtOTImZS00ODAxLWE1YTETMjA0NjZmMzImN2JmliwidC16IjIjOWEzMGRLWQ4ZDctNGFhNC05NjAwLTRiZTc2MjVmZjZiNSIsImMiOiJh9>
- ³⁴ <https://home.kpmg/uk/en/home/insights/2020/05/chief-economist-note-new.print.html>