



The State of the State 2025:  
Northern Ireland  
A view from the people who  
use it and the people who run it



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## Methodology

*The State of the State* blends two forms of research. To understand public attitudes, Deloitte and Reform commissioned Ipsos UK to conduct an online survey which achieved responses from 5,721 UK adults aged 16-75, between 13 and 19 December 2024. Quotas were set to reflect the known profile of the UK adult offline population and a boost sample was achieved in Scotland, Wales and Northern Ireland. In total 687 responses were achieved in Scotland, 697 in Wales and 501 in Northern Ireland. For the UK figures, results have been weighted back to the correct proportion for each nation. Where responses do not sum to 100 this is due to computer rounding or questions which require multiple answers to be chosen.

Our qualitative research comprises interviews with more than 80 leaders in government and public services. They include senior civil servants, council chief executives, NHS leaders and elected representatives. The interviews took place between October 2024 and February 2025.

**The views of interviewees quoted in this report are their own and not the views of Deloitte or Reform.**



# Introduction

Welcome to *The State of the State 2025*.

For more than a decade, this annual report has brought together a survey of Northern Ireland’s public alongside interviews from government and public service leaders. By fusing these two research elements, it provides a **view of the state from the people who rely on it and the people who run it.**



*The State of the State 2025* finds Northern Ireland’s public sector significantly more optimistic than it has been for some years. The return of the Executive has not just brought political oversight and democratic legitimacy back, it has brought a fresh sense of direction and energy. Northern Ireland has some serious challenges, but now it has the political leadership to help solve them.

This year’s report commentates on some major shifts in the public mood, including an encouraging uptick in positivity. While trust in government is not yet where it needs to be, it has risen by a significant percentage across numerous measures.

Our interviews with public sector leaders, as ever, were fascinating, sobering and uplifting in equal measure. They told us about the serious challenges faced by many public services after a tough decade. But they also told us about their optimism for bold reform and a more joined-up, citizen-centred sector.

This Northern Ireland report can be read in tandem with our UK report for a dual perspective. In the meantime, thank you to everyone who took part in our survey and all the exceptional leaders that shared their thinking to inform our research. We hope *The State of the State* continues to bring evidence to debates on public sector reform and celebrates everything that government and public services achieve.



**Marie Doyle**  
Partner  
Deloitte Northern Ireland



**Charlotte Pickles**  
Director  
Reform



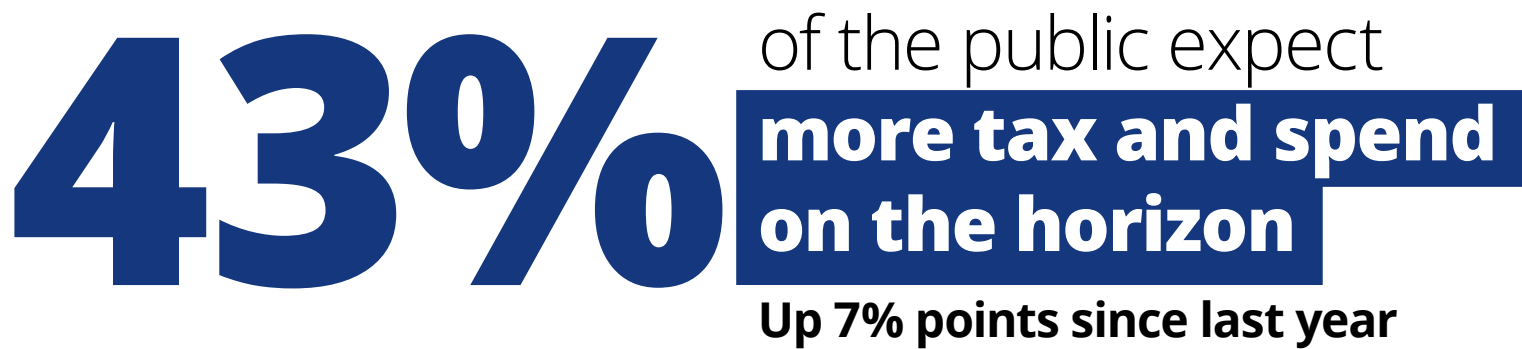
# The State of the State 2025

Northern Ireland citizen survey at a glance

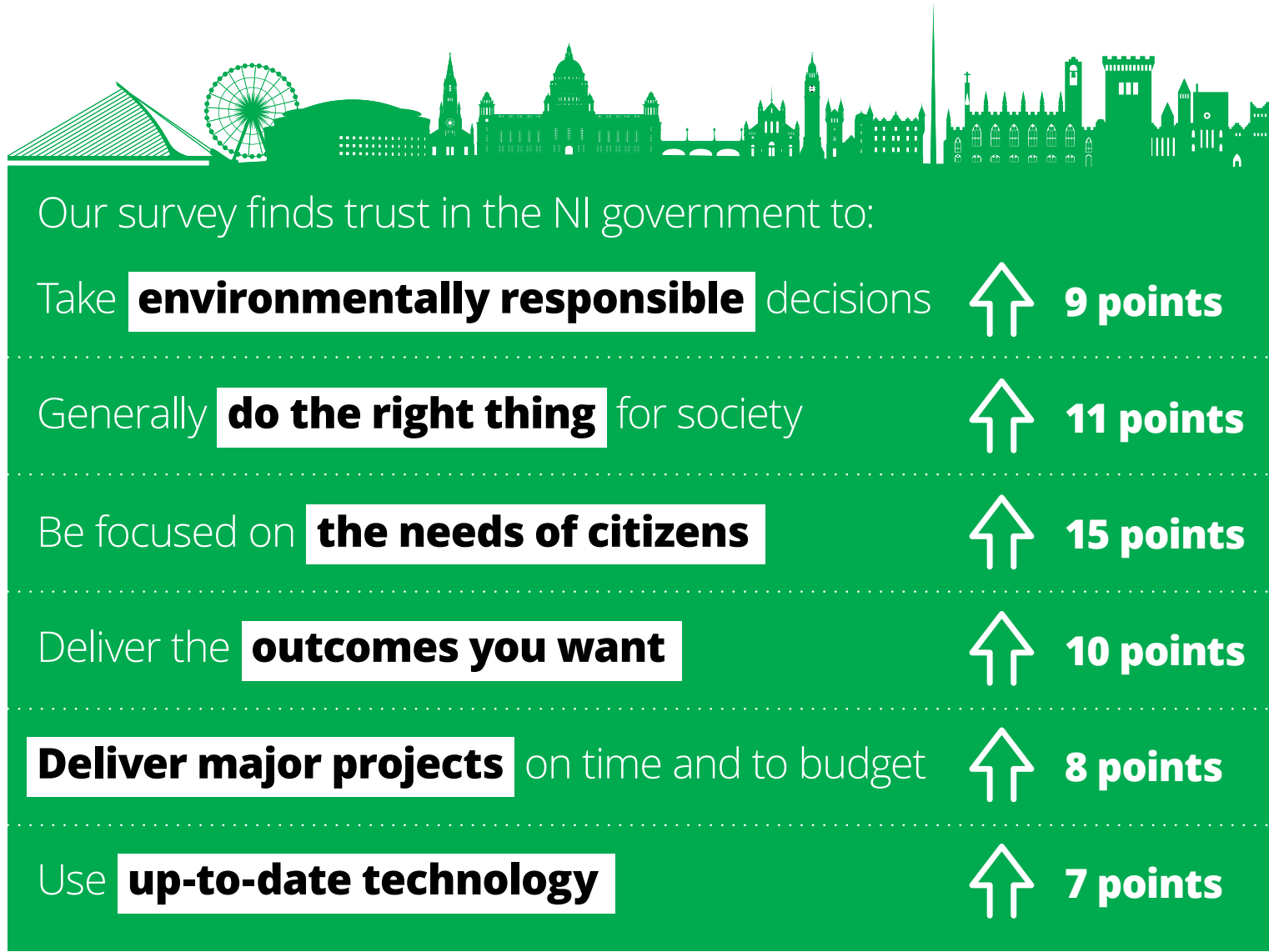
## The public's top five priorities for improvement



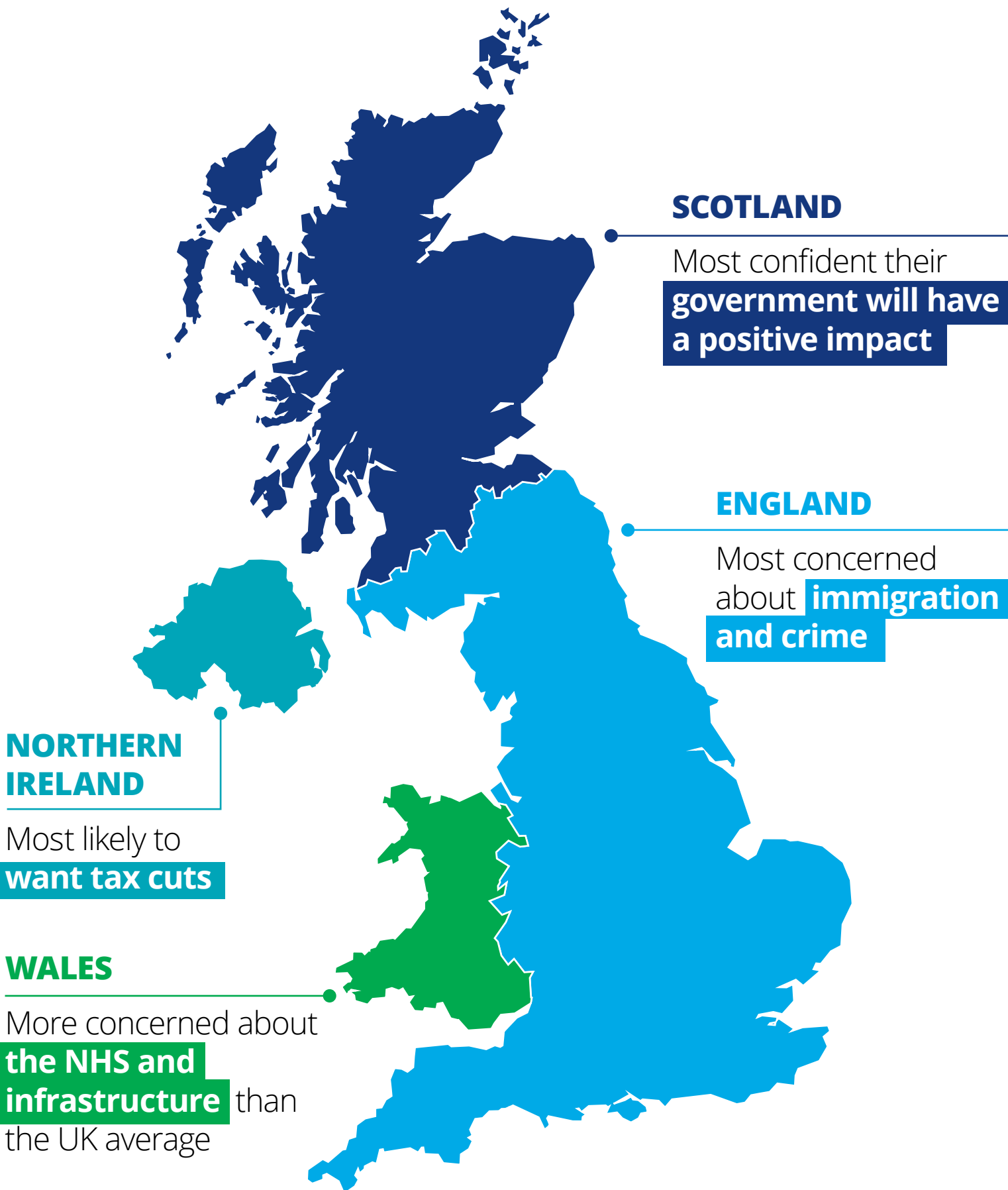
## Taxing times?



## Trust in Northern Ireland's government has improved across the board since our last survey



## A United Kingdom of nations and regions





# The State of the State 2025

Northern Ireland interview insight at a glance

Our report is informed by interviews with more than

30

Northern Ireland public sector leaders. They include elected representatives, senior civil servants, police leaders, council chief executives and NHS officials.

## Key themes from our research interviews

- 1. A welcome return to government but critical challenges remain
- 2. A reminder that democracy is fragile and vital
- 3. Who would be a public sector leader?
- 4. The ultimate prize lies beyond the Programme for Government
- 5. Day-to-day pressures are pushing net zero to one side
- 6. Technology is the future, but the sector needs skills, bandwidth and convergence

## Five quotes from Northern Ireland’s public sector leaders that define the state of the state in 2025

“ People are getting by on the positivity and relief of being back. **The vibes are good,** but I’m not seeing any serious reform.  
Elected Representative

“ All my adult life, we’ve talked about potential. **Let’s talk about delivery instead.**  
Elected Representative

“ If this isn’t addressed, we’ll become a **health service with a government attached.**  
Chief Executive, Arms-Length Body

“ Our concept of public sector leadership needs to change. **It needs more courage.**  
Council Chief Executive

“ We took **devolution to the brink of collapse** to realise there is no viable alternative. If it goes again, it’s gone for good.  
Elected Representative





# The State of the State 2025

In three words

Each of our interviews with public sector leaders ended with the same question: **what's the state of the state in three words?** Here are their answers.



Click to view  
zoomed-in Wordle



Click to view  
zoomed-in Wordle

Key: ● Positive ● Neutral ● Negative

Font size indicates frequency





# Executive summary

*The State of the State* provides an annual view of the public sector from the people who use it and the people who run it. The report blends two forms of research by bringing together a survey of the UK public alongside interviews with government leaders.

Our survey, conducted by Ipsos UK, polled 5,712 UK adults about their attitudes to government and public services. For our interviews, we spoke to more than 80 public sector leaders including senior civil servants, council chief executives and NHS leaders in all nations of the UK.

## In summary

*The State of the State 2025* finds Northern Ireland’s public more positive about its government and public services than in recent years, and with a shift in their priorities: more are concerned about immigration, fewer about climate change. Our survey also finds that Northern Ireland’s unique position between the UK and the European Union is making its public increasingly aware of the importance of trade. Public sector leaders told us they are buoyed by the Executive’s return, and many clamour for bold reforms – including and beyond those in the Programme for Government – that will put public services on a more sustainable footing.

## Ten key findings



### Major shifts in public priorities as immigration rises and climate change falls

Our annual poll on public priorities finds the Northern Ireland public increasingly concerned about immigration, but less concerned about climate change.



### Trust in Northern Ireland’s government has increased across the board

Our annual trust tracker finds an upturn in trust for Northern Ireland’s government. Whilst still not overly trustful, the survey shows a distinct lift in public attitudes.



### Northern Ireland’s unique perspective on trade

As government at every level pursues growth, our survey asked the public what they see as the biggest drivers. Reflecting Northern Ireland unique position post-Brexit, its public emphasised the importance of trade.



### Northern Ireland is the UK’s most worried about the cost of living, housing and the NHS

Whilst our survey shows green shoots of optimism among the public, it also finds that people in Northern Ireland are the most pessimistic in the UK about the cost of living, housing and the NHS.



# Executive summary

## Ten key findings *(continued)*



### **Northern Ireland favours lower taxes but expects the opposite**

Our survey finds Northern Ireland's public favours tax cuts over higher taxes and public spending – but expects the latter.



### **A return to devolved government is welcome but critical challenges remain**

The return of the Northern Ireland Executive is universally welcomed across the sector but leaders recognise that tough choices need to be made.



### **Who would be a public sector leader?**

Our interviews surfaced some of the difficulties faced by public servants that are affecting the recruitment of a new generation of leaders.



### **The ultimate prize will last beyond the Programme for Government**

Leaders told us that expectations of the PfG, in draft at the time of our interviews, are sky high. But ultimately, the bold reforms needed to make the public sector sustainable will last beyond the current plan.



### **Day-to-day pressures are pushing net zero to one side**

Our interviewees told us that the relentless pressures on their organisations, along with waning public interest, are diminishing the urgency of net zero transition.



### **Technology is the future, but the sector needs skills, bandwidth and convergence**

Public sector leaders are clear that technology is integral to public sector reform. But many told us that the sector struggles to afford digital skills; leaders rarely have the bandwidth to drive change; and too many public bodies are operating alone rather than seizing the potential of collaboration and convergence.





# Executive summary

## Recommendations

Our research points to **five recommendations**:

### 1. Set out a long-term vision for the public sector and how it will improve life in Northern Ireland

The new Programme for Government (PfG) has set out an ambitious plan up to 2027. It includes **measures to stabilise Northern Ireland's public sector** and address its most immediate challenges. A longer-term vision could go beyond fixing the sector's problems to providing a compelling view of what Northern Ireland's government and public services could look like in the future, how it could feel to work in, and what it could do for the public.

The Executive might also consider whether the Northern Ireland Civil Service (NICS) has the right structures, skills and resources it needs **to deliver the PfG and its longer-term aspirations.**

### 2. Turn up the volume on the green agenda

Our research finds the public becoming less worried about climate change – perhaps even complacent – and public sector leaders concerned that net zero targets will not be met. That suggests a **pressing need for every organisation and business engaged in net zero transition to engage** the public in the climate agenda and why it matters.

### 3. Recognise that public service is a people business

Public sector leaders acknowledge that a new narrative for leadership across the sector is needed if it is to attract a new generation. That suggests a **need for demonstrable, sustained investment in people** alongside public engagement to show the positive, purpose-led side of working in government and public services.



# Executive summary

## Recommendations

Our research points to **five recommendations** (*continued*):

### 4. Grow the public sector's 'halo effect' technology successes

While commentaries often focus on the problems, the UK's public sector have rolled out some world-leading uses of technology. Rather than re-invent new solutions at every turn, **the sector should consider how it can grow out its best examples – the projects with a halo effect – into new uses.**

That creates an **opportunity to use proven technology successes** as the vehicle for converging systems and processes across the sector. That could allow for even more effective interoperability between services and substantial productivity gains if multiple institutions use the same digital systems. Key to getting this right would be a clear recognition of the proven benefits and a willingness for government to be directive across the public sector.

### 5. Provide regular figures on the 'public sector gap'

Our survey shows the public understand the funding pressures on public services. That view is informed by **regular updates on the state of the public finances and budget settlements across the public sector.** What's missing is a view on the gap between what those funding settlements can achieve versus the demands on them – like the number of hospital beds available and the number needed.

**Data and transparency on that gap could help the public understand the trade-offs**

and how the sector would need to reduce demand, improve productivity or access additional funding to close it.





# The public's view of the public sector





# The public's view of the public sector

Our annual *State of the State* survey, delivered by Ipsos UK, tests the public mood on government and public services.

This year finds the Northern Ireland public increasingly concerned about national security but less worried – perhaps even complacent – about climate change.

Our annual questions on trust, confidence and optimism also suggest a turnaround in attitudes. After years of growing pessimism, the survey shows more positive sentiment towards government and public services.

This section of *State of the State* sets out the findings from our latest survey.



## Key takeaways



### Major shifts in public priorities as immigration rises and climate change falls

Our annual poll on public priorities finds the Northern Ireland public increasingly concerned about immigration, but less concerned about climate change.



### Northern Ireland's unique perspective on trade

As government at every level pursues growth, our survey asked the public what they see as the biggest drivers. Reflecting Northern Ireland's unique position post-Brexit, its public emphasised the importance of trade.



### Northern Ireland favours lower taxes but expects the opposite

Our survey finds Northern Ireland's public favours tax cuts over higher taxes and public spending – but expects the latter.



### Trust in Northern Ireland's government has increased across the board

Our annual trust tracker finds an upturn in trust for Northern Ireland's government. Whilst not yet overly trustful, the survey shows a distinct lift in public attitudes.



### Northern Ireland is most worried about the cost of living, housing and the NHS

Whilst our survey shows green shoots of optimism among the public, it also finds that people in Northern Ireland are the most pessimistic in the UK about the cost of living, housing and the NHS.



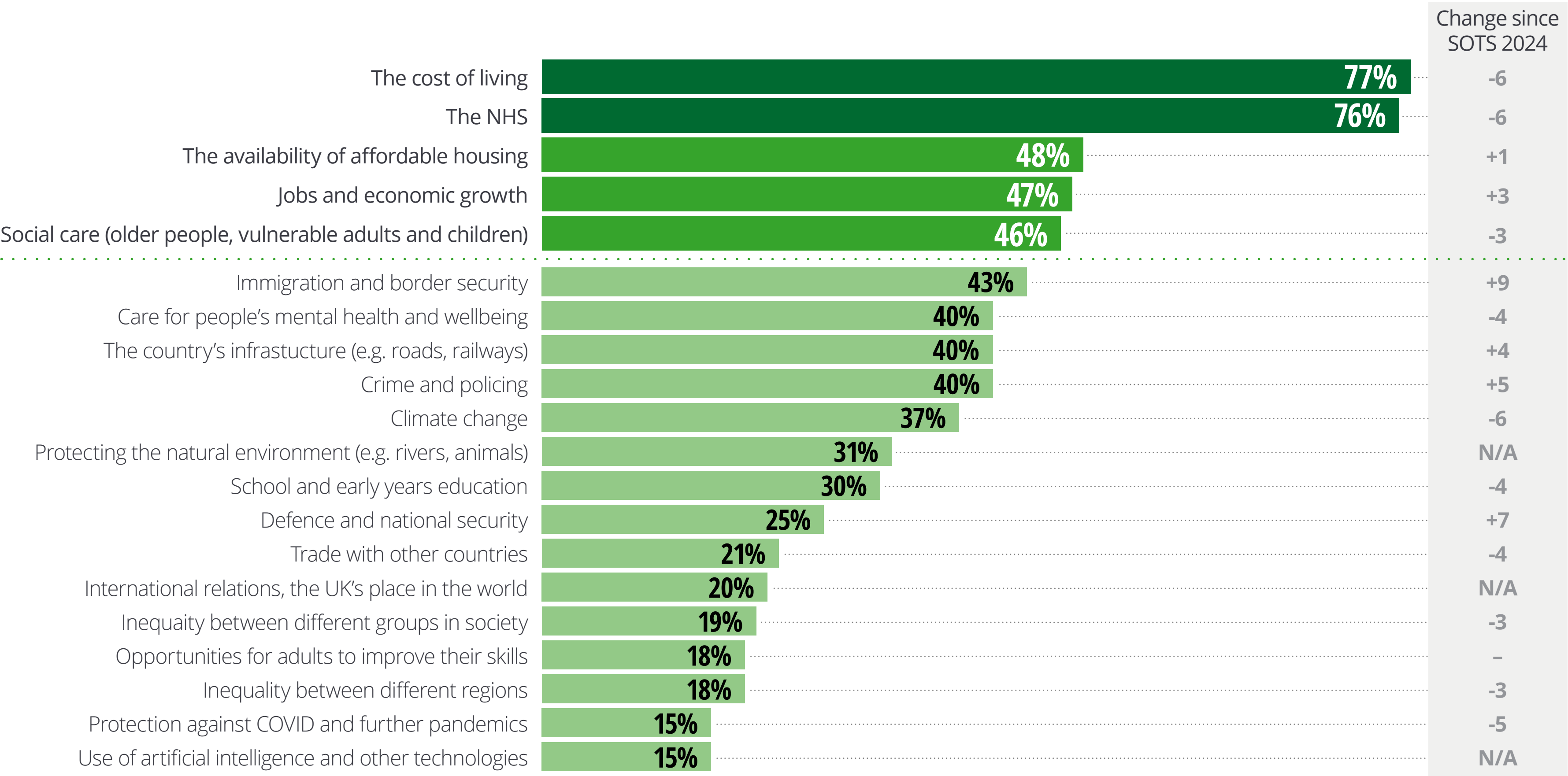
# Shifts in public priorities as immigration rises and climate change falls

Our survey asked the public to name their top priorities for improvement. For the third year, Northern Ireland's public see **the cost of living and the NHS as their biggest priorities.**

However, this year sees some major shifts in the public mood. Concerns about **immigration and border security have gone up** by nine percentage points since last year's report, taking the issue from eleventh to sixth place. Defence and national security have also risen by a significant seven percentage points.

At the same time, **climate change has dropped** six percentage points, taking it from the public's seventh to its tenth priority.

Q: Which of the following should be top priorities for improvement in the UK over the next few years or so?



Base: 501 online NI adults 16-75

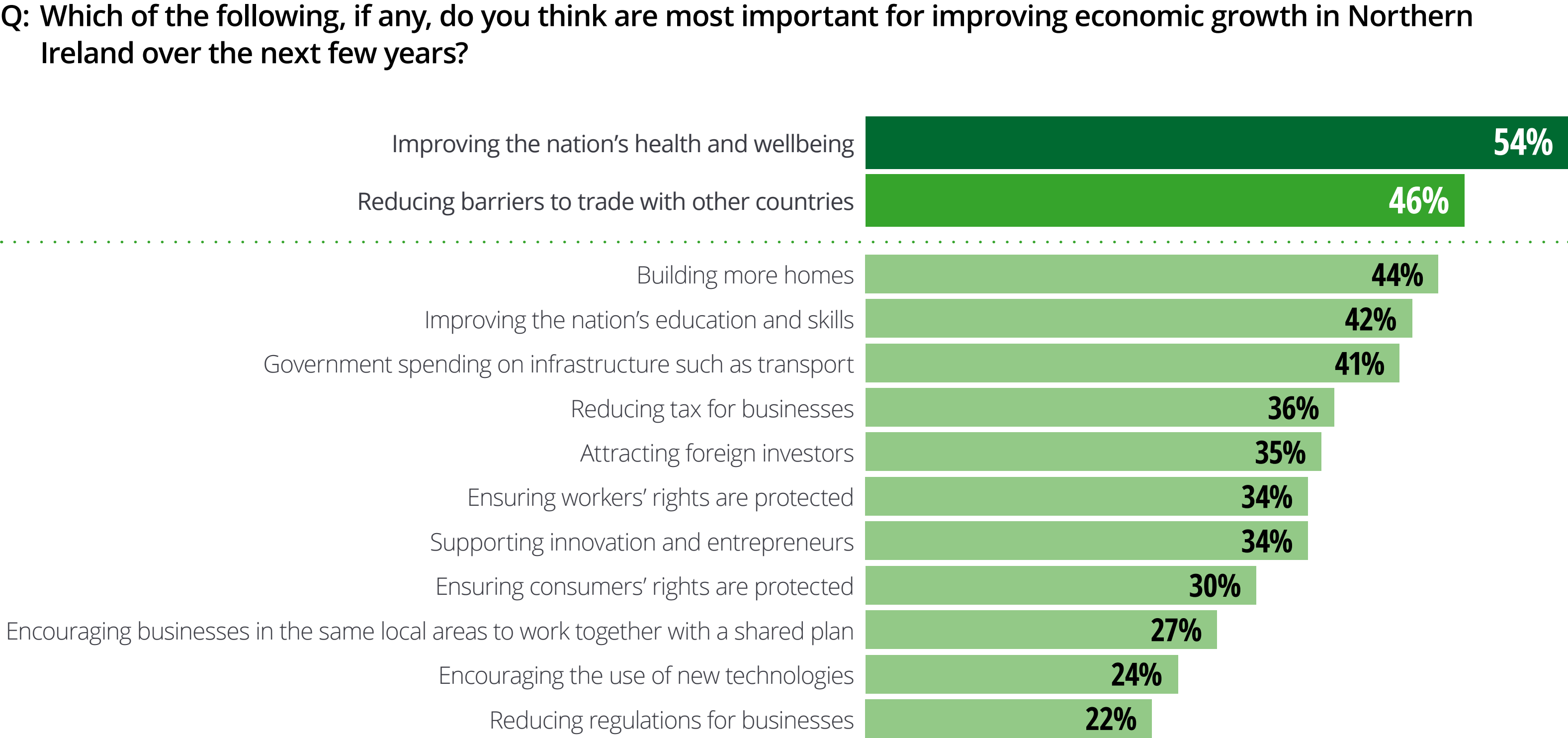
# Northern Ireland's unique perspective on trade

As government at every level pursues economic growth, we asked the public which factors they believe will deliver a stronger economy.

Across the UK, the **most common response was 'improving the nation's health and wellbeing'**. This top answer is a reminder that a pro-growth environment for people matters as well as a pro-growth environment for business.

However, the second most popular response in Northern Ireland differs from the rest of the UK. While the other nations consider education and skills to be the second most important factor, people in Northern Ireland placed **'reducing barriers to trade' as second**.

This shows just how much Northern Ireland's public are aware of their unique circumstances post-Brexit, and the **importance of international trade to their prosperity**.



Base: 501 online NI adults 16-75



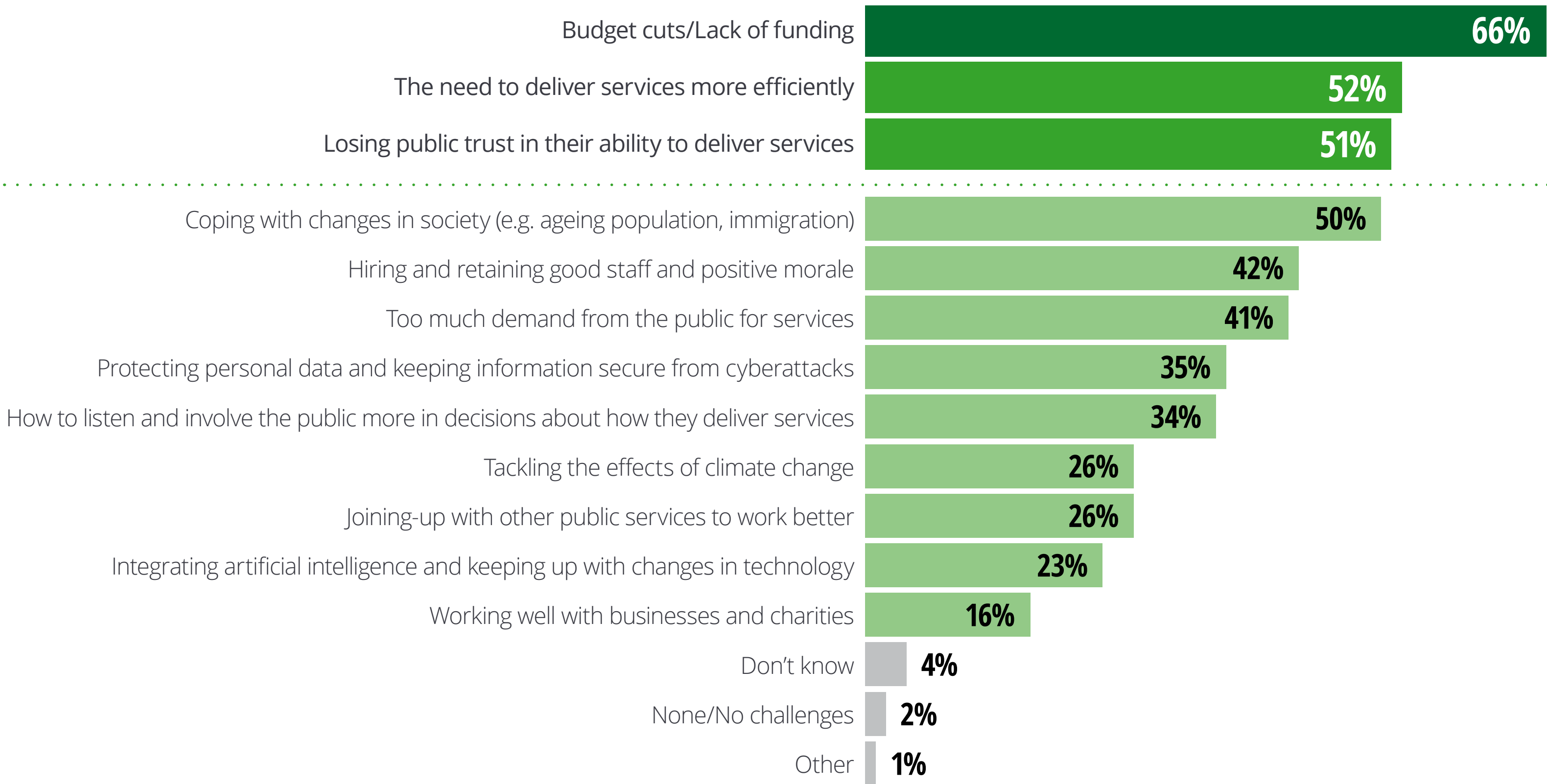
# The Northern Ireland public understand public service pressures, but trust matters too

Our survey asked what the public see as the biggest challenges to public services in the years ahead. By some margin, the most common answer was lack of funding. This suggests **widespread understanding about the strain on the public finances.**

The second most common response was the **need to deliver services more efficiently,** which is cited more in Northern Ireland than in other parts of the UK. Clearly the Northern Ireland public are alive to debates around reform and productivity.

Also worth noting is that half of the public said that a **loss of public trust is a challenge for public services** – that underlines the importance of trust for Northern Ireland’s public.

**Q: Which of the following, if any, do you think will be the biggest challenge(s) for public services as a whole over the next five years?**



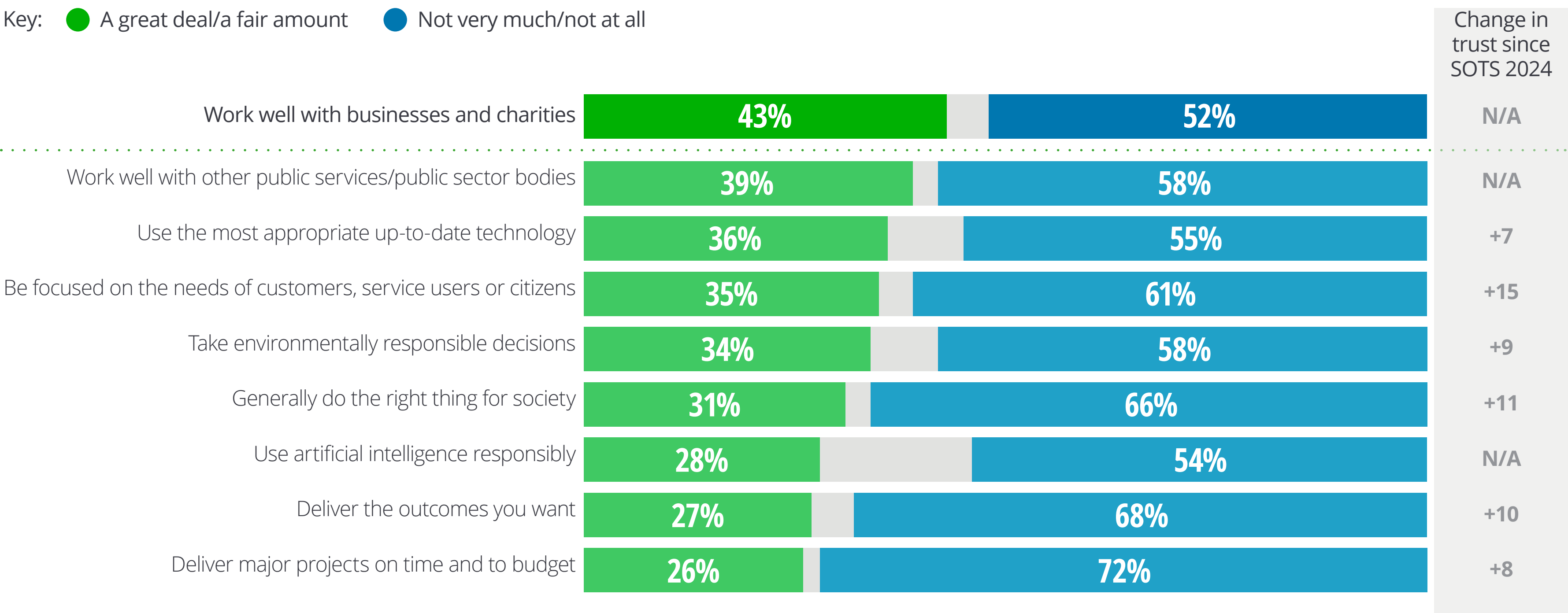
Base: 501 online NI adults 16-75



# Trust in Northern Ireland’s government has increased across the board

Every year, our *State of the State* survey explores levels of trust in government across a range of capabilities. This year, it found a **significant uptick in trust** since our last report. While public trust remains relatively low, it has increased across every measure to a statistically significant degree.

Q: To what extent, if at all, do you trust the Northern Ireland Government to ...?



Base: 501 online NI adults 16-75



# ... but remains relatively low compared to other UK administrations

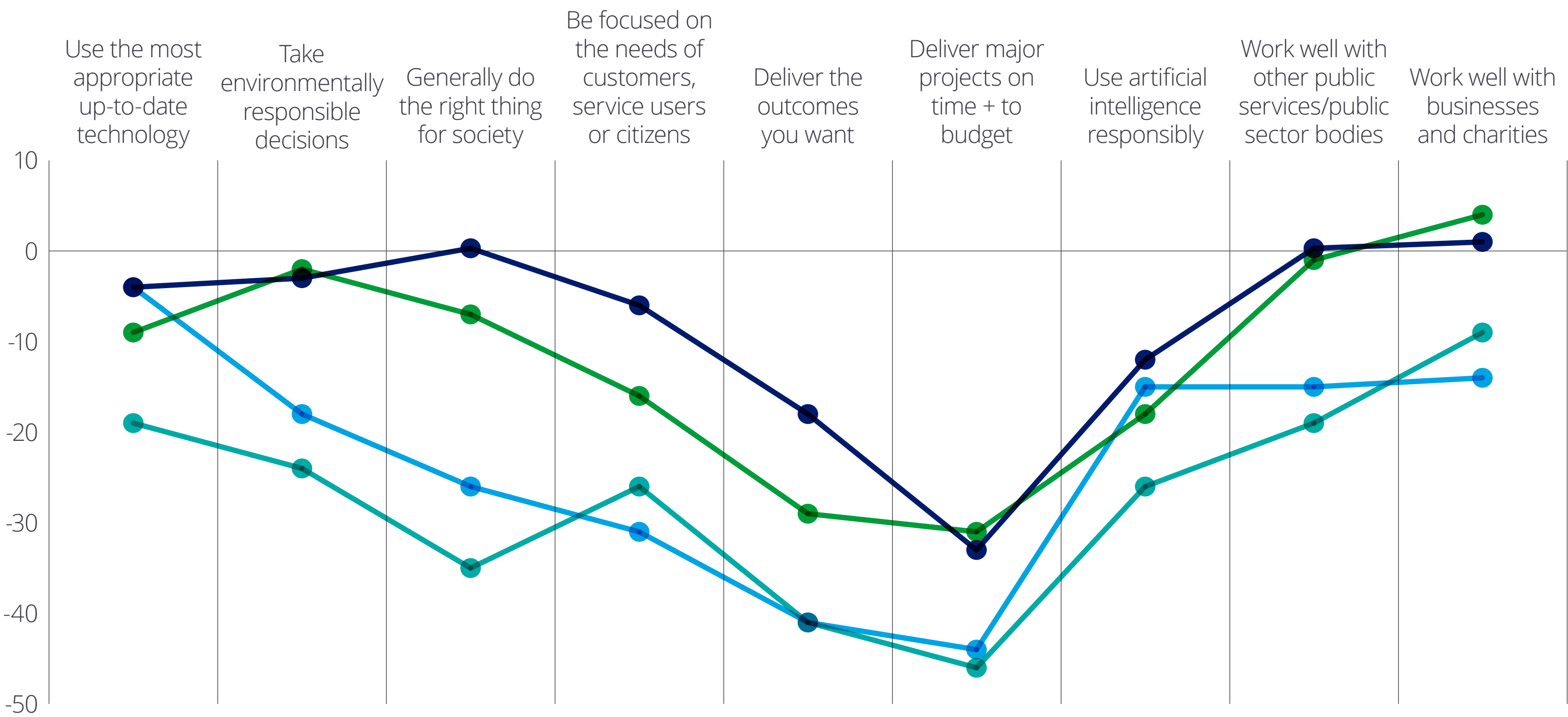
This chart shows the same data in comparison with other administrations.

Trust in the Northern Ireland government remains lower than trust in the UK government across six measures – quite possibly as a **hangover from the intermittent absence of an Executive** and the difficulty getting agreement in a multi-party Executive.



Q: To what extent, if at all, do you trust ... to ...?

Key: Scotland (dark blue), Wales (green), UK Government (light blue), Northern Ireland (teal)



Base: 501 online NI adults 16-75

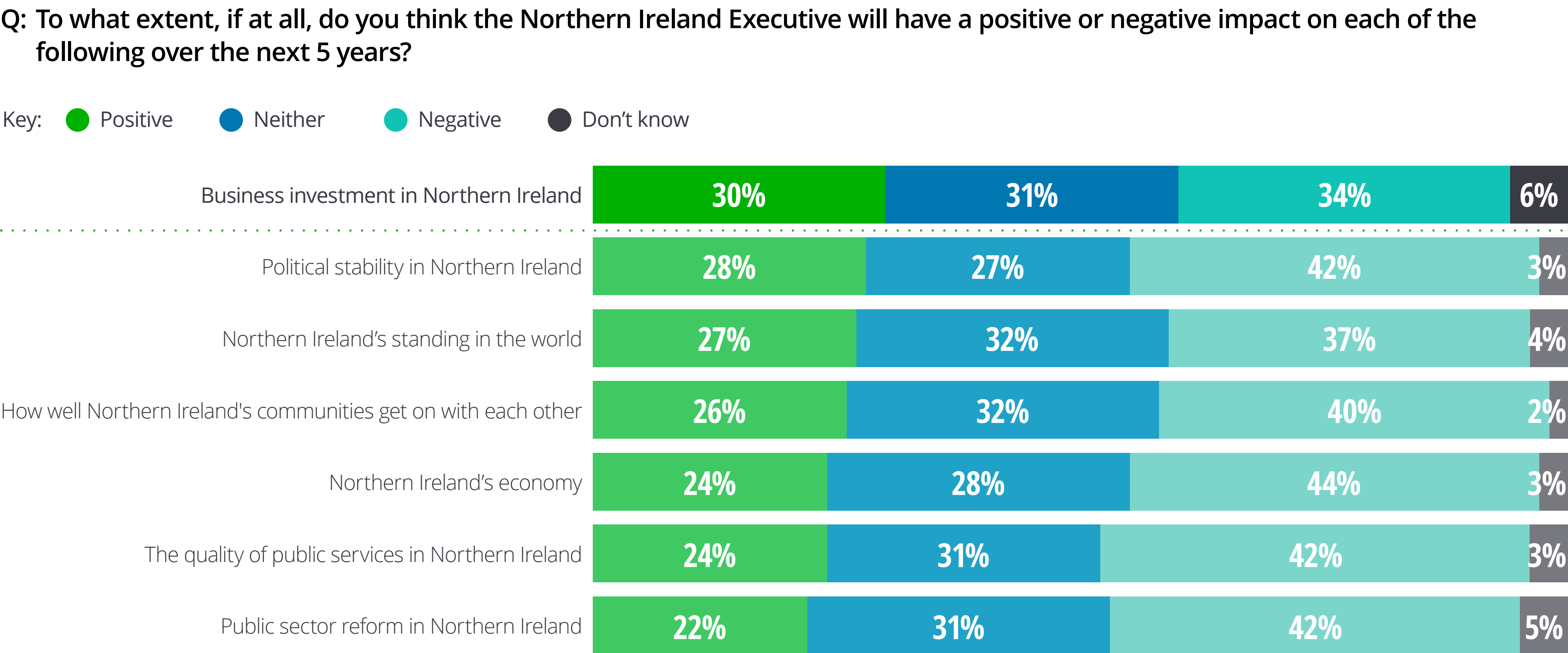
% Net trust (great deal/fair amount minus not very much/not at all)



# Confidence may be slow to return

Our survey asked people in Northern Ireland, Scotland and Wales about confidence in their respective governments to deliver impact in the years ahead over seven criteria.

It found a mixed picture in Northern Ireland: more of the public are pessimistic than optimistic about the government's impact, with particular concerns around the quality and reform of public services.



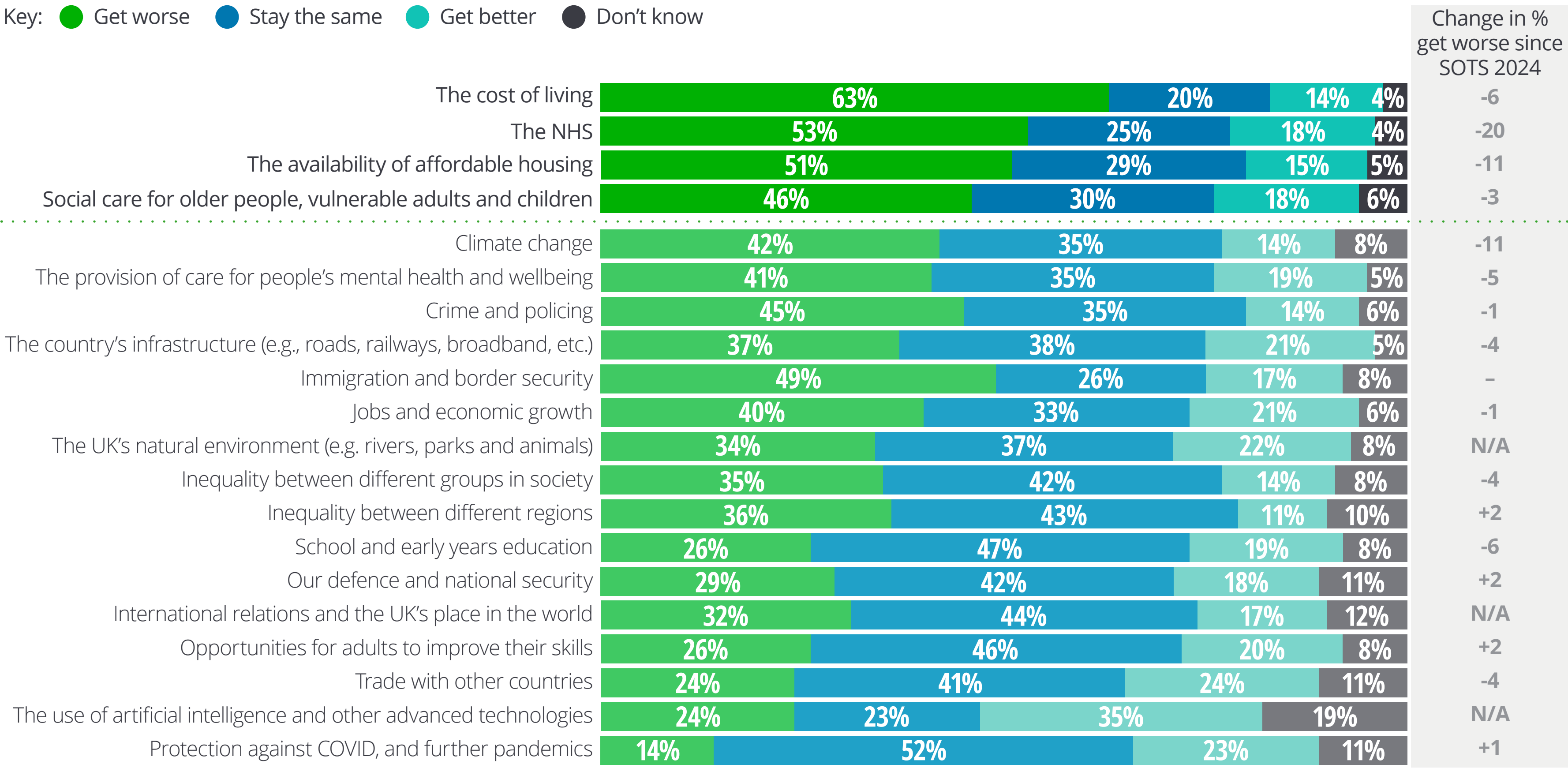
Base: 501 online NI adults 16-75      % Net positive impact (positive impact minus negative impact)

# Green shoots of positivity

Every year, our optimism tracker maps the levels of optimism among the public for a range of policy issues. This year's tracker finds the Northern Ireland public – in common with the rest of the UK – **more pessimistic than optimistic.**

However, there have been some notable shifts since last year. The number of people thinking that **the NHS, housing and climate change are likely to get worse has dropped.** So while the public is not optimistic about any of those areas, they are less worried than they were a year ago.

**Q: Thinking about the next few years or so, do you think that each of the following will get better, get worse or stay about the same in the UK?**



Base: 501 online NI adults 16-75



# Northern Ireland is most worried about the cost of living, housing and the NHS

While worries for the future appear to have rescinded across a range of policy areas, these figures are all relative.

Northern Ireland’s public are more **concerned about the outlook for the NHS, housing and the cost of living** than any other nation of the UK. On the other hand, they are the **least worried about the natural environment.**

The chart to the right shows the ‘net get better’ scores for each nation and highlights the statistically significant differences.

Q: Thinking about the next few years or so, do you think that each of the following will get better, get worse or stay about the same in the UK?

Significantly higher or lower than average: ● ●

	England	Scotland	Wales	Northern Ireland
The cost-of-living	-41	-41	-46	-49
Immigration and border security	-35	-26	-36	-32
Affordable housing	-31	-28	-32	-36
Crime and policing	-30	-27	-32	-31
Climate change	-29	-27	-30	-30
Social care	-28	-29	-29	-28
The NHS	-24	-29	-30	-34
Protecting the UK’s natural environment	-22	-19	-19	-12
Inequality between different groups in society	-20	-23	-22	-21
Inequality between different regions	-20	-19	-25	-24
Mental health care	-19	-28	-17	-23
Jobs and economic growth	-18	-19	-19	-19
The country’s infrastructure	-16	-21	-21	-16
Our defence and national security	-13	-11	-18	-11
International relations and the UK’s place in the world	-12	-10	-14	-16
School and early years education	-11	-8	-11	-9
Opportunities for adults to improve their skills	-4	-11	-4	-6
Protection against COVID/pandemics	+6	+4	+4	+9
The use of artificial intelligence and other advanced technologies	+10	+13	+13	+14
Trade with other countries	0	-6	-6	0

Net get better by nation (better minus worse)

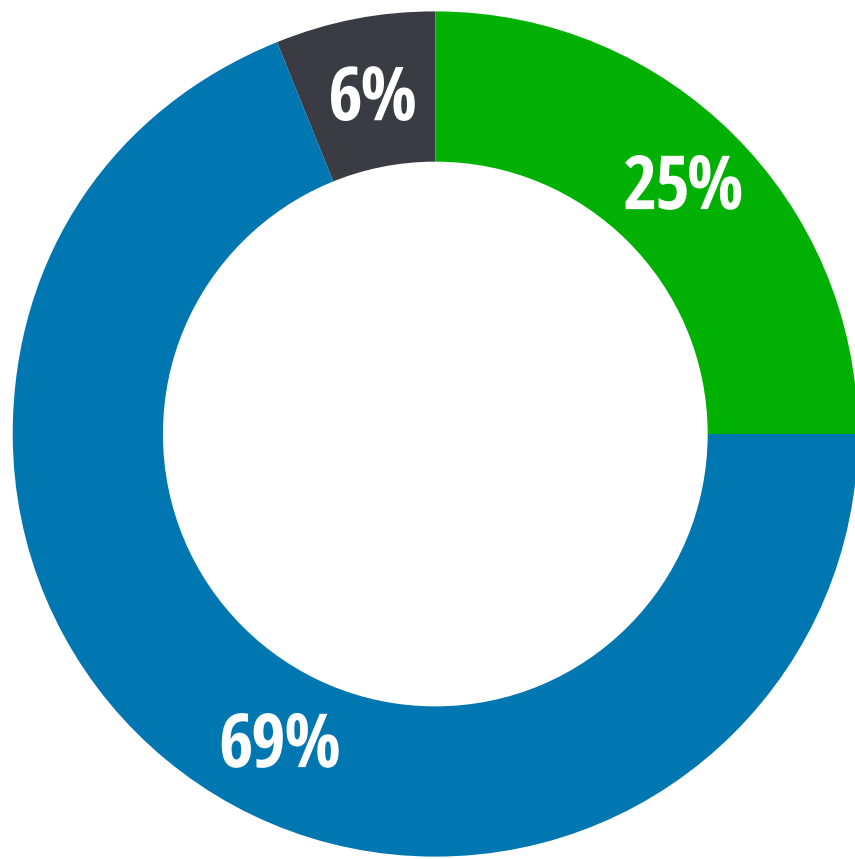
Base: 5,721 online UK adults 16-75

# Seven in ten say net zero will be missed in Northern Ireland

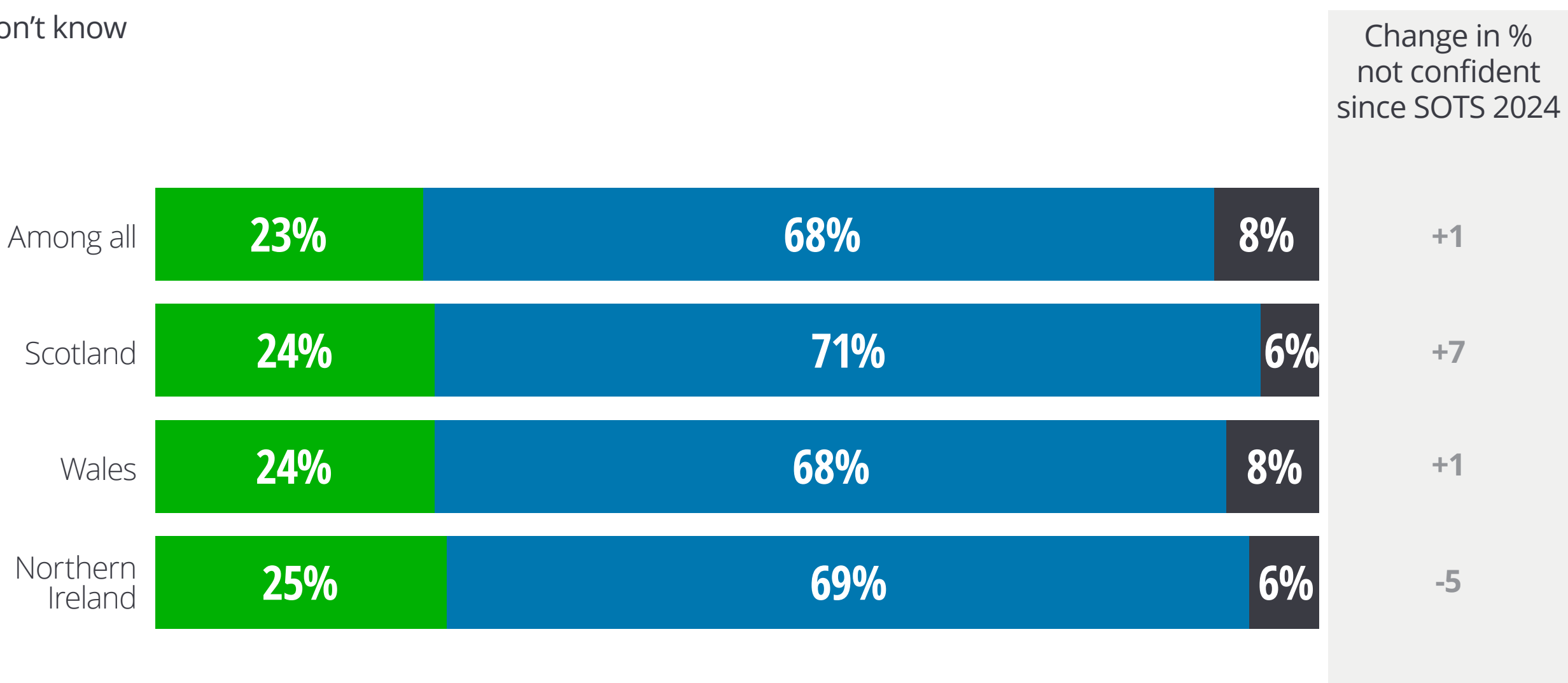
Seven in ten of Northern Ireland's public are not confident that the UK will reach its target of a net zero economy by 2050, broadly equal to our findings last year. The same proportion also doubt the Northern Ireland government's target will be met, although there has been a marginal improvement since last year.

Q: How confident, if at all, are you that the UK Government will reach its target for achieving net zero emissions across the economy by 2050?

Key: ● Confident ● Not confident ● Don't know



Q: How confident, if at all, are you that Scotland/Wales/Northern Ireland will reach its target for achieving net zero emissions across the economy by 2045/2050?

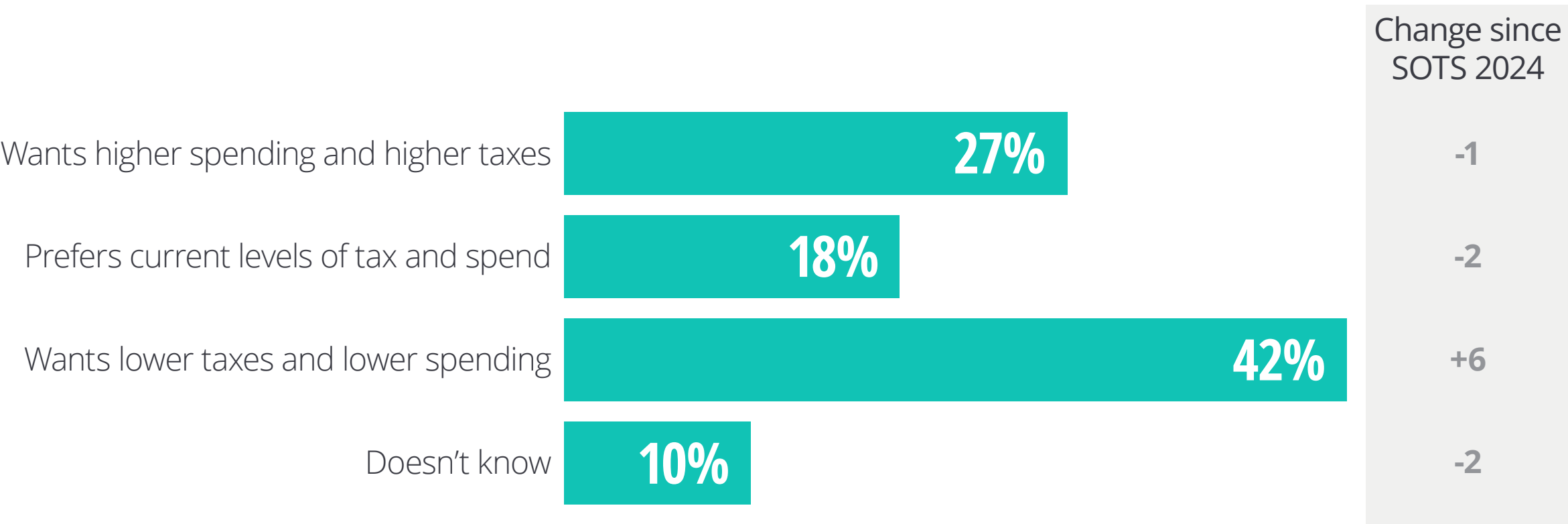


Base: 5,721 online UK adults 16-75

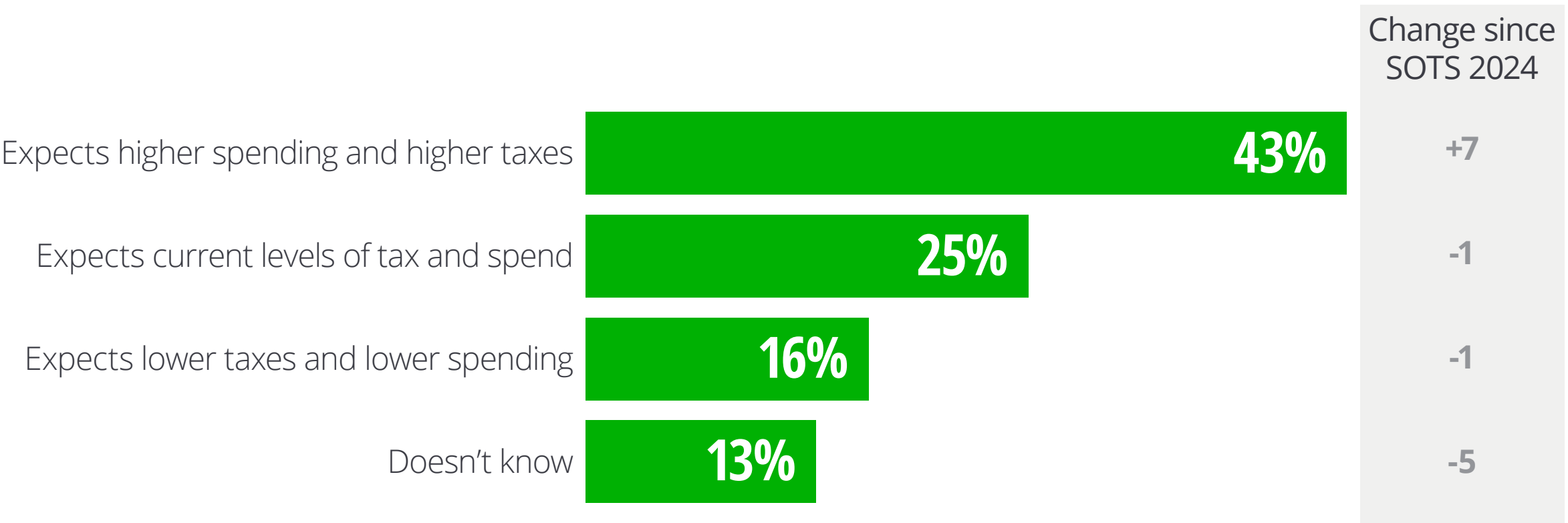


# Northern Ireland favours lower taxes but expects the opposite

Our annual survey asks the public if they would prefer higher public spending or lower taxes. This year, more of Northern Ireland’s public favour lower taxes. In fact, Northern Ireland stands out as the part of the UK most likely to prefer lower taxes over higher spending, an increase of six percentage points since last year.



Regardless of whether they would prefer higher spending or lower taxes, more of the Northern Ireland public expect taxes to rise in the future. The number of people expecting taxes to increase has gone up by seven percentage points since last year.



Base: 501 online NI adults 16-75

**This question in detail**  
The survey asked: As you know, governments have to make decisions to set the right balance between the advantages of higher public spending and the advantages of less tax or public borrowing. Which of the following, if any, do you think **should** be UK government policy for the balance between public spending and the levels of taxation and public borrowing in the future? And which of the following, if any, do you think **will** be UK government policy for the balance between public spending and tax and/or public borrowing in the future?



# Insight from public sector leaders





# Insight from public sector leaders

For more than a decade, our *State of the State* reports have been informed by interviews with senior figures from across the public sector.

This year we interviewed more than 80 public sector leaders including 30 in Northern Ireland. They included politicians, senior civil servants, police leaders, council chief executives and NHS officials.

This section of *State of the State* sets out insights from our research interviews in Northern Ireland.



## Key takeaways



### Return to devolved government is welcome but critical challenges remain

The return of the Northern Ireland Executive is universally welcomed across the sector but leaders recognise that tough choices need to be made.



### The ultimate prize will last beyond the Programme for Government

Leaders told us their expectations of the PfG are sky high, but ultimately, the bold reforms needed to make the public sector sustainable will last beyond the current plan.



### Day-to-day pressures are pushing net zero to one side

Our interviewees told us that the relentless pressures on their organisations, along with waning public interest, are diminishing the urgency of net zero transition.



### A reminder that democracy is fragile and vital

Interviewees told us that the intermittent absence of an Executive is a sobering reminder of the importance and the fragility of democracy.



### Who would be a public sector leader?

Our interviews surfaced some of the difficulties faced by public servants that are affecting the recruitment and promotion of a new generation of leaders



### Technology is the future, but the sector needs skills, bandwidth and convergence

Public sector leaders are clear that technology is integral to public sector reform. But many told us that the sector struggles to afford digital skills; leaders rarely have the bandwidth to drive change; and too many public bodies are operating alone rather than seizing the potential of collaboration and convergence.



# Return to devolved government is welcome but critical challenges remain



People are getting by on the positivity and relief of being back. **The vibes are good,** but I'm not seeing any serious reform.

**Elected representative**





# Return to devolved government is welcome but critical challenges remain

Without exception, public sector leaders welcomed the return of an Executive. Many lauded the demonstrably positive relationships between ministers, especially at the top of government.

Senior civil servants were, inevitably, the most pleased to see the return of political leaders, not least to mark the end of legal ambiguity and allow them to concentrate on their core jobs.

However, many interviewees were impatient for ministers to make the bold decisions needed to reform public services and put the state on a more sustainable financial footing. The Executive’s return is hugely welcome – but ministers have come back to some serious challenges.

“ There is a **collective focus from the Executive** on making a real difference.  
Elected representative

“ The glass is half-full which is a big change from the negativity of last year. **Everyone is more upbeat and optimistic.** We are in a better place.  
Council Chief Executive

“ There is a **lack of appetite to take difficult and unpopular decisions.**  
Elected representative



“ It’s been brilliant to have ministers back. They’re growing into their roles, but they do **have challenges ahead to navigate.**  
Senior Civil Servant



# A reminder that democracy is fragile and vital



We took **devolution to the brink of collapse** to realise there is no viable alternative. If it goes again, it's gone for good.

Elected representative





# A reminder that democracy is fragile and vital

“It’s **essential to have Ministers**. The state simply doesn’t work without them.”  
Senior Civil Servant

The return of a stable Executive has inevitably triggered reflection on the state of democracy in Northern Ireland.

Many of our interviewees shared their observations on what devolution means for them and for Northern Ireland more widely. Ultimately the intermittent absence of ministers has served as a reminder that executive leadership, democratic accountability and an elected legislature should never be taken for granted.

“One thing I would love to see in this would be a **better respect for and from our politicians**.”  
Senior Civil Servant

“Two-thirds of Assembly **time is spent on non-binding motions** rather than legislation. We need to turn that around to address the **significant legislative backlog**.”  
Elected representative





# Who would be a public sector leader?



Our concept of public sector leadership needs to change.  
**It needs more courage.**

**Council Chief Executive**





# Who would be a public sector leader?



People are afraid to lead, because they're **afraid of the challenges and the criticism.** It pushes people towards process.

**Council Chief Executive**

This generation of leaders across Northern Ireland's government and public services have lived through a relentless series of challenges.



Northern Ireland needs positive, courageous political and administrative **leadership focused on addressing the greatest needs of our society** now and in the future.

**Senior Civil Servant**

From the budget cuts of austerity to the technical challenge of Brexit, from the absence of an Executive to the cost of living crisis, from coping with COVID to the difficulty of implementing reform – Northern Ireland's public servants have shown resilience, commitment and grit.

But the past decade has taken a toll in a variety of ways. Some interviewees told us that the public sector faces a leadership crisis as experienced hands leave and their roles appear too daunting to fill. Others said that years of firefighting have left the civil service too risk averse. But many see a way forward: politicians and officials need to change the narrative around public service leadership to attract a new generation of courageous public servants ready to deliver change.



The **risk appetite** of the NICS is **in the gutter.**

**Elected representative**



**Leaders are feeling fatigued** and dejected.

**Senior Civil Servant**



The public sector is an unattractive environment in terms of political scrutiny, media scrutiny, public discourse and salary. **Experienced leaders are getting out and not hanging around** past retirement age.

**Chief Executive,  
Umbrella Organisation**



# The ultimate prize lies beyond the Programme for Government

“

All my adult life, we've talked about potential.  
**Let's talk about delivery** instead.

Elected representative





# The ultimate prize lies beyond the Programme for Government

“By the time this PfG is agreed, there is only going to be two years left of the mandate – **if they fiddle around** with the development of action plans, **you’re going to see very little action.**”

Senior Civil Servant

Our research period for *State of the State* 2025 took place as Northern Ireland’s *Programme for Government (PfG)* was in formation, but ahead of its launch. It was clear throughout our interviews that expectations of the PfG were sky high across the public sector.

Overall, our interviews surfaced an ambition for government and public services that includes and goes beyond the PfG. They told us about three ambitions: bold reform, even if that means structural change; a sense of urgency in its delivery; and greater collaboration across services alongside greater engagement with the voluntary sector. Ultimately, public sector leaders are fatigued by ‘just surviving’ and are clamouring for fundamental change.

“Simply injecting more money into public services without addressing underlying issues and focusing on outcomes **will not lead to meaningful improvement.**”

Chief Executive, Arms-Length Body

“We have a choice. We can live with the fiction that it’s too difficult to restructure how we organise power in Northern Ireland, and we accept that degradation of public services is inevitable. Or we don’t accept that, and **we change things. But do the structures of government give us good outcomes? No.**”

Senior Civil Servant







The challenges start with health and social care

“

If this isn't addressed, we'll become  
a **health service with  
a government attached.**

Chief Executive, Arms-Length Body



# The challenges start with health and social care

Our interviewees were clear that health and social care are Northern Ireland’s most pressing challenges, as the Programme for Government (PfG) makes clear.

Many argued that the level of funding for health is unsustainable, and that social care needs to be reformed alongside as demand on the two is indivisible. Some went on to say that funding for health is now so dominant in Northern Ireland that other public services will suffer unless urgent action is taken.

“ **Reform is so badly needed.** We have entirely unsustainable services in health, special educational needs and justice. They need radical reform as they’re fiscally unsustainable.  
**Senior Civil Servant**

“ The biggest challenge is to **try and improve services while making massive savings.**  
**Senior Civil Servant**



“ The **trajectory of health expenditure is not sustainable.** This is the top priority. If we don’t reform, by 2040 health consumes the entire block grant.  
**Elected representative**



# Day-to-day pressures are pushing net zero to one side



There's a lot of good work being done on net zero, but **we've got a long, long way to go** – and it's not a sexy spend.

**Council Chief Executive**





# Day-to-day pressures are pushing net zero to one side

“Climate is starting to drop down people’s agendas and other things are worrying them more, like health and housing. Economic benefits will be slow, but all the evidence tells us that **green jobs and skills will present significant competitive advantage** in the medium-long term.”  
**Senior Civil Servant**

Climate change remains a big issue for many leaders across the public sector but is not the priority many want it to be.

Interviewees told us that relentless day-to-day pressures leave them with little bandwidth or resources to make progress on the road to net zero. At the same time, public interest – and the political urgency that comes with it – seems to have waned.

“It’s **not top of the list** by a long way.”  
**Elected representative**

“The targets were pretty heroic at the time they were agreed, and **we’ve not seen the delivery progress** on that heroism.”  
**Senior Civil Servant**





Technology is the future, but the sector needs skills,  
bandwidth and convergence

“

There is a need for strong leaders who  
can **harness digital opportunities**.  
People with vision and expertise and  
a good risk appetite – that’s what will lead  
to cultural change.

Chief Executive, Umbrella Body





# Technology is the future, but the sector needs skills, bandwidth and convergence

All our interviewees saw technology, including artificial intelligence, as integral to public sector reform. Several cited the appointment of senior digital leaders in government as a major step forward and leaders across the sector are optimistic for change under the Programme for Government (PfG).

However, three barriers to digital progress emerged in our interviews. First, leaders told us that affording people with digital skills remains an ongoing challenge for the sector. Second, some argued that day-to-day pressures leave them with little bandwidth to drive technology transformation. And third, some told us that public bodies too readily chart their own course on digital rather than collaborate with others, missing the opportunity to collaborate and converge their systems.

“ Artificial intelligence programmes are as stymied as everything else because **we’re trying to keep the lights on.**  
Senior Civil Servant

“ We’ve consciously decided that we’re not going to replace digital infrastructure – **replacement of digital is in parallel with updating systems and processes.**  
Senior Civil Servant



“ There are challenges with consistency in technology among councils. **People are going on solo runs** as there’s no requirement for each council to operate on the same platform.  
Council Chief Executive



# The public sector's vision of the future





# The public sector's own vision for 2035

Our interviews explored how government and public service leaders want their organisations and services to look in ten years' time.

Their collective responses provide a glimpse of what government and public services could look like in 2035.

This section of *State of the State* summarises their thinking and offers a 2035 vision of the public sector from within.



## Key takeaways

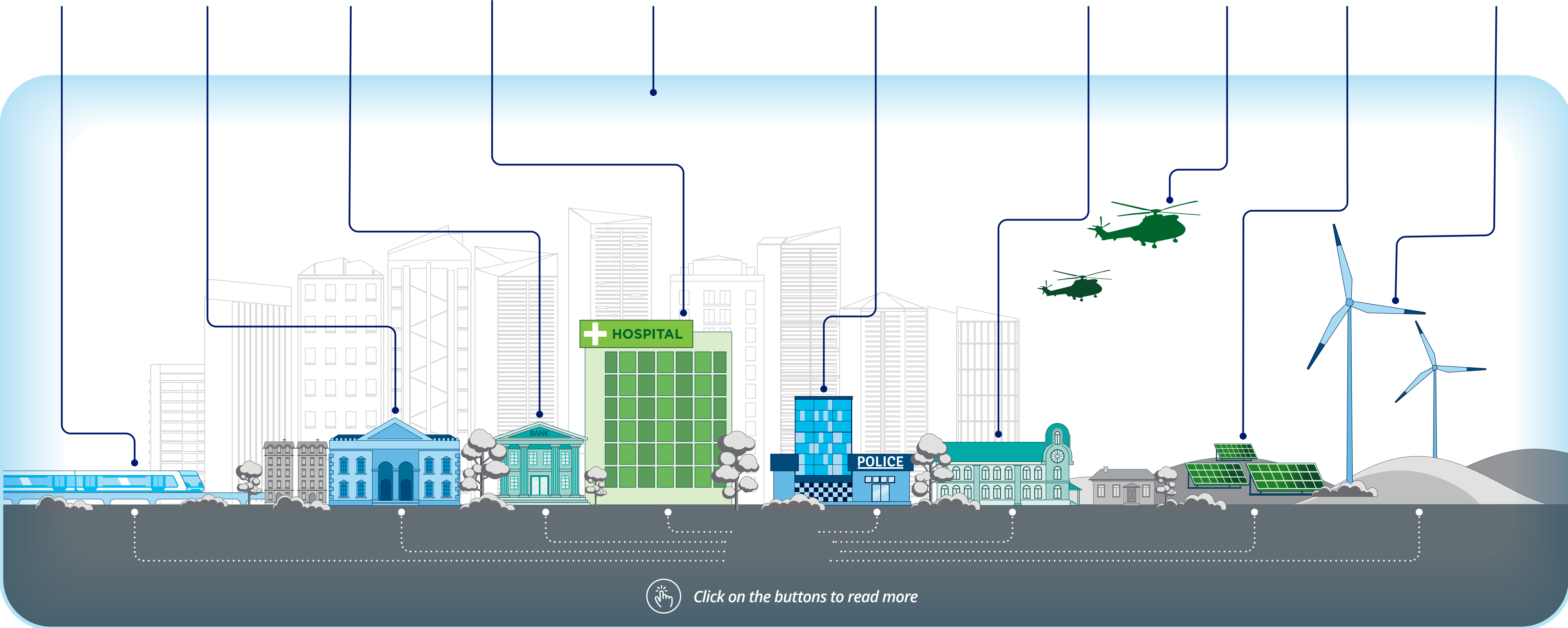
Our interviews asked leaders about their hopes for the public sector of 2035. Put together, their responses provide a glimpse into the future. Their vision is defined by four characteristics:

- 1.** Interactions with government are **frictionless** for the citizen, and technology including artificial intelligence is used to provide frontline workers with the information they need at the point of decision.
- 2.** Local **public services** work collectively, especially on preventative measures, and ensure seamless citizen pathways between them. They engage the voluntary sector as a and private sectors delivery partners and co-produce services with the public.
- 3.** **Place-based** thinking will at last come of age. It will allow for a renaissance in our communities that includes integrated transport, new ways to access health services, and joined-up growth plans.
- 4.** Government **decision-making** is rooted in the long-term interest, with measurement and evaluation baked-in and commercial issues taken into account as the norm. Central government is smaller with greater clarity on roles and purpose.



# The public sector's vision for 2035

Our interviews with government and public sector leaders surfaced their own vision for 2035





# Conclusion and recommendations





# Conclusion and recommendations

## Our recommendations

This research points to **five recommendations**

### 1. Set out a long-term vision for the public sector and how it will improve life in Northern Ireland

The new Programme for Government (PfG) has set out an ambitious plan up to 2027. It includes **measures to stabilise Northern Ireland's public sector** and address its most immediate challenges. A longer-term vision could go beyond fixing the sector's problems to providing a compelling view of what Northern Ireland's government and public services could look like in the future, how it could feel to work in, and what it could do for the public.

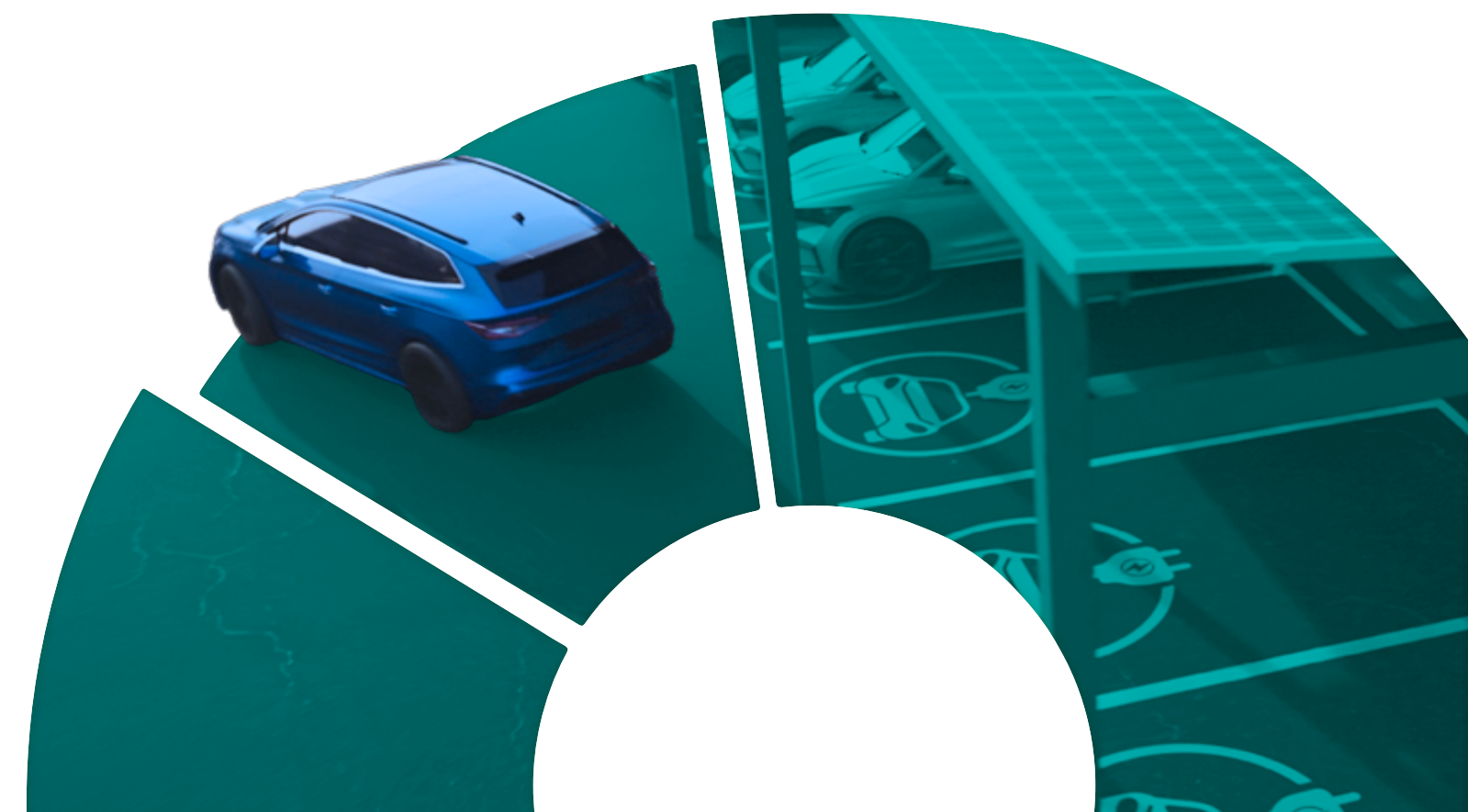
The Executive might also consider whether the Northern Ireland Civil Service (NICS) has the right structures, skills and resources it needs **to deliver the PfG and its longer-term aspirations.**

### 2. Turn up the volume on the green agenda

Our research finds the public becoming less worried about climate change – perhaps even complacent – and public sector leaders concerned that net zero targets will not be met. That suggests a **pressing need for every organisation and business engaged in net zero transition to engage** the public in the climate agenda and why it matters.

### 3. Recognise that public service is a people business

Public sector leaders acknowledge that a new narrative for leadership across the sector is needed if it is to attract a new generation. That suggests a **need for demonstrable, sustained investment in people** alongside public engagement to show the positive, purpose-led side of leadership in government and public services.





# Conclusion and recommendations

## Our recommendations

This research points to **five recommendations** (*continued*)

### 4. Grow the public sector's 'halo effect' technology successes

While commentaries often focus on the problems, the UK's public sector have rolled out some world-leading uses of technology. Rather than re-invent new solutions at every turn, **the sector should consider how it can grow out its best examples – the projects with a halo effect – into new uses.**

That creates an **opportunity to use proven technology successes** as the vehicle for converging systems and processes across the sector. That could allow for even more effective interoperability between services and substantial productivity gains if multiple institutions use the same digital systems. Key to getting this right would be a clear recognition of the proven benefits and a willingness for government to be directive across the public sector.

### 5. Provide regular figures on the 'public sector gap'

Our survey shows the public understand the funding pressures on public services. That view is informed by **regular updates on the state of the public finances and budget settlements across the public sector.** What's missing is a view on the gap between what those funding settlements can achieve versus the demands on them – like the number of hospital beds available and the number needed.

**Data and transparency on that gap could help the public understand the trade-offs** and how the sector would need to reduce demand, improve productivity or access additional funding to close it.





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