Lisburn & Castlereagh City Council

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November 7th, 2024

Chairperson: Alderman A Grehan

Vice Chairperson: Alderman A G Ewart MBE

Aldermen: J Baird and M Gregg

Councillors: J Gallen, A Gowan, J Harpur, C Kemp, J Laverty BEM, D Lynch, U Mackin, A Martin, C McCready, T Mitchell and N Parker

Ex-Officio: The Right Worshipful the Mayor, Councillor K Dickson
Deputy Mayor, Councillor R Carlin

Notice Of Meeting

A meeting of the Regeneration and Growth Committee will take place on **Thursday, 7th November 2024** at **6:00 pm** in the **Council Chamber and Remote Locations** for the transaction of business on the undernoted agenda.

A hot buffet will be available in the Members Suite from 5.15 pm for those Members who have confirmed in advance.

DAVID BURNS
Chief Executive
Lisburn & Castlereagh City Council

Agenda

1.0 APOLOGIES

2.0 DECLARATION OF MEMBERS' INTERESTS

(i) conflict of interest on any matter before the meeting (Members to confirm the specific item)
(ii) pecuniary or non-pecuniary interest (Member to complete disclosure of interest form)

3.0 REPORT FROM HEAD OF PLANNING & CAPITAL DEVELOPMENT

3.1 NI Water Infrastructure Update

For Noting

3.2 Planning Service Improvement Plan

For Decision

4.0 REPORT FROM HEAD OF ECONOMIC DEVELOPMENT

4.1 New Department for Economy Proposals – Sub-Regional Economic Strategy

For Decision

4.2 LCCC Labour Market Partnership (LMP) Job Fairs

For Noting

4.3 Northern Ireland Tourism Alliance – correspondence requesting support

For Decision

5.0 CONFIDENTIAL REPORT FROM DIRECTOR OF REGENERATION & GROWTH

5.1 BRCD Destination Royal Hillsborough - Proposed addendum to Outline Business Case

For Decision

Confidential for reason of information relating to the financial or business affairs of any particular person (including the Council holding that information).

1Confd Draft Addendum to OBC BRCD Destination Royal Hillsborough - Highlighted for Redactions.pdf — *Not included*

5.2 Event Marquees Business case

For Decision

Confidential for reason of information relating to the financial or business affairs of any particular person (including the Council holding that information).

6.0 ANY OTHER BUSINESS

LISBURN & CASTLEREAGH CITY COUNCIL

MEMBERS DISCLOSURE OF INTERESTS

1. Pecuniary Interests

The Northern Ireland Local Government Code of Conduct for Councillors under Section 6 requires you to declare at the relevant meeting any pecuniary interest that you may have in any matter coming before any meeting of your Council.

Pecuniary (or financial) interests are those where the decision to be taken could financially benefit or financially disadvantage either you or a member of your close family. A member of your close family is defined as at least your spouse, live-in partner, parent, child, brother, sister and the spouses of any of these. Members may wish to be more prudent by extending that list to include grandparents, uncles, aunts, nephews, nieces or even close friends.

This information will be recorded in a Statutory Register. On such matters **you must not speak or vote**. Subject to the provisions of Sections 6.5 to 6.11 of the Code, if such a matter is to be discussed by your Council, **you must withdraw from the meeting whilst that matter is being discussed.**

2. Private or Personal Non-Pecuniary Interests

In addition you must also declare any significant private or personal non-pecuniary interest in a matter arising at a Council meeting (please see also Sections 5.2 and 5.6 and 5.8 of the Code).

Significant private or personal non-pecuniary (membership) interests are those which do not financially benefit or financially disadvantage you or a member of your close family directly, but nonetheless, so significant that could be considered as being likely to influence your decision.

Subject to the provisions of Sections 6.5 to 6.11 of the Code, you must declare this interest as soon as it becomes apparent and **you must withdraw from any Council meeting (including committee or sub-committee meetings) when this matter is being discussed**.

In respect of each of these, please complete the form below as necessary.

Pecuniary Interests

Meeting (Council or Committee - please specify and name):

____

Date of Meeting: ______________________________________

Item(s) in which you must declare an interest (please specify item number from report):

____

Nature of Pecuniary Interest:

Private or Personal Non-Pecuniary Interests

Meeting (Council or Committee - please specify and name):

Date of Meeting:

Item(s) in which you must declare an interest (please specify item number from report):

Nature of Private or Personal Non-Pecuniary Interest:

Name:

Address:

Signed:	Date:

If you have any queries please contact David Burns, Chief Executive, Lisburn & Castlereagh City Council

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Lisburn & Castlereagh City Council

Committee:	Regeneration and Growth Committee
Date:	7 November 2024
Report from:	Head of Planning and Capital Development

Item for:	Noting
Subject:	NI Water Infrastructure Update

1.0 **Background**

1. Members were previously advised in August 2024, following receipt of a letter from NI Water (NIW) dated 30 July 2024, that due to its 2024/25 budget allocation and likely budget allocation in 2025/26, it will have limited ability to increase capacity for new connections to the wastewater system.

2. NIW further indicated that approximately 19,000 new residential units and other types of non-residential development proposed across Northern Ireland will require upgraded NIW assets. A solution to these capacity constraints would, in their assessment, take several fully funded Price Control periods to resolve.

3. In a letter dated 15 October NIW provide an update on the proposed developments within the Council area which are potentially impacted by a lack of capacity for new connections to the wastewater system and in their assessment outside of developer funded solutions.

4. NIW Water estimate that in the Council area that 1,900 new residential units could be impacted in Lisburn, Metropolitan Lisburn, Metropolitan Castlereagh, Carryduff, Hillsborough and Moira.

Key Issues

1. The Council had planned for housing growth for over the Local Development Plan period for approximately 12,000 new residential units and other types of non-residential development such as commercial and public buildings. This level of planned growth in the Council Area was subject to a consultation process with NIW and no infrastructure constraints were identified.

2. Blaris (West Lisburn) was identified as a place for strategic mixed-use development and it is noted from the table attached to the latest NIW update that the 1,300 units planned are impacted. NIW had never highlighted any risk to the Council that Blaris could not be developed as it was outside the scope of a developer funded solution.

3. This represents a significant impediment to growth in Lisburn and Castlereagh as the new housing funded a road which unlocked the economic potential of the wider lands. The unlocking of this strategic designation was of primary importance to growing the rate base of the Council area.

4. The absence of appropriate levels of continuous investment in NIW assets also has significant implication for the delivery of affordable housing within the Council

area. Approximately 400 new affordable residential units are potentially not deliverable in the short to medium term on the basis of the latest advice.

5. Securing affordable housing is important in sustaining growth. Attracting people to the Council area to take up employment opportunities with an aging population structure is a factor in promoting places for growth.

6. NIW provided limited direction to developers but emphasise the importance of applying through the pre-development enquiry process to understand the impact on a case-by-case basis. This impacts on the timeliness of decision-making and the capacity for developers to make investment decisions.

7. The Minister for Infrastructure has recently described in the Assembly an option for new legislation to allow developers to make financial contributions for investment in infrastructure. Even if additional private investment could be secured there remains an issue in respect of the capacity of NIW to deliver the capital projects that follow.

8. The impacts for planned growth and the changed position of NIW in terms of planned capital investment due to budget constraint requires further clarification and challenge (if required).

9. Officers will write to NIW seeking more detailed information on the evidence that has informed the letter, so challenge, if required, can be brought to minimise any adverse impact on growth in the Council area.

2.0 Recommendation

Members are asked to note the latest advice from NIW and that officers will write to NIW seeking further evidence on the impact that capacity constraints have on the growth in the Council Area over the period of the Local Development Plan.

3.0 Finance and Resource Implications

There are no finance or resource implications.

4.0 Equality/Good Relations and Rural Needs Impact Assessments

4.1	Has an equality and good relations screening been carried out?	No
4.2	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out	N/A
4.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	No
4.4	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out.	N/A

Appendices:	Appendix 1a – Letter from NI Water (15 October 2024) Appendix 1b – Attachment to letter (Areas and Proposals Impacted)

Northern Ireland Water
PO Box 1026
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www.niwater.com

Tel: 0345 7440088

northern ireland water
Delivering what matters

Mr David Burns
Chief Executive Officer
Lisburn & Castlereagh City Council
Civic Centre Lagan Valley Island
1 The Island
Lisburn
BT27 4RL

15th October 2024

Email: david.burns@lisburncastlereagh.gov.uk

Dear Mr Burns,

Re: NI Water Economic Constraints

I refer to my letter of 30th July 2024, since the letter was issued NI Water has been working through the detail of the areas involved and continuing our discussions with the developers affected.

We are now able to provide you with more detailed information in relation to the specific areas affected within your Council area. The PDF document attached to this letter provides details of the developments/proposed developments within the Lisburn & Castlereagh City Council area which will be impacted (within the 19,000 units province wide) that are outside of developer funded solutions. This may be for one or more of the following reasons:

1. An area within the wastewater network that is 'closed' to any further connections due to high polluting assets.
2. The Wastewater Treatment works within the catchment operating at or over its design capacity.
3. The availability of funding to undertake the required capital upgrades to existing assets.

We estimate that approximately 1,900 units within the Lisburn & Castlereagh City Council area are impacted by these 'closed areas' where developer funded solutions are no longer possible, these areas are located within the following towns:

- Belfast
- Carryduff
- Dundonald
- Dunmurry
- Hillsborough

- Lisburn
- Moira

Please note that the closed areas will not cover all of these towns and NI Water will continue to consider each planning application on a case-by-case basis depending on the location within the catchment.

These units include homes in private and social ownership schemes, commercial and public buildings. The current budget allocation means that at present, NI Water will not be able to make the necessary investments to enable connections for these units. In the current funding scenario, the solutions required to address these capacity constraints will take several fully funded Price Control periods to resolve.

For all proposed sites in these areas, developers should in the first instance continue to apply through the pre-development enquiry process and we will advise next steps. We will also continue to support developments in these areas where it can be proven that:

- The site has extant planning with no conditions relating to capacity constraints or
- The site is a redevelopment and there is no intensification of foul sewage discharge post development compared to the sewage discharge from the site within the last 5 years.

In relation to a timeframe for moving forward with resolving capacity constraints. The Department for Infrastructure (DfI) has provided NI Water with a total indicative budget allocation of almost £0.5 billion for 2024/25, representing just under 40% of the total non-ring-fenced budget for the Department. However, this current budget allocation is less than the levels the Utility Regulator determined were necessary for both RDEL (operating costs) and CDEL (capital investment). In terms of capital investment, the shortfall in investment ranges between £0.5bn - £0.9bn in the last three remaining years of this regulatory settlement (PC21). To ensure our delivery plans are aligned with the allocated budget from DfI, NI Water are working through a process of prioritising the asset investment that may progress, seeking to protect the environment and maximising outcomes for customers. We are liaising with DfI, the Utility Regulator, NI Environment Agency, Consumer Council NI & the Drinking Water Inspectorate as part of this process. Inevitably this means there is investment that has been planned that is now being deferred.

To accommodate such significant capital investment budget reductions from the level set by the Utility Regulator NI Water has maintained its base maintenance investment but is sacrificing many PC21 new asset builds and asset upgrade projects. This is so existing assets can remain operational and provide service level stability for the population of Northern Ireland.

Yours sincerely

Gary Curran

Gary Curran
Director Engineering & Sustainability

Planning reference	Planning Status (June 24)	Requires NIW Capital Investment either nominated PC project and or capital intervention (Y/N)	Site Name	Town Name	**Commercial** Units	**Commercial** Unit Details	**Industrial** Units	**Industrial** Unit Details	**Residential** Private	Residential **Social** (Confirmed via NIHE SDHP plan) Included as part of X)
Application withdrawn	Not Approved	Y	149 Ballyskeagh Road, Belfast	Belfast	1	Extension to existing restaurant			0	
LA05/2023/0805/F	Not Approved	Y	39 Old Saintfield Road, Belfast	Belfast					7	
LA05/2023/0601/F	Not Approved	Y	70 Ballynahinch Road, Carryduff	Carryduff	0		0		7	
LA05/2023/0601/F	Not Approved	Y	70 Ballynahinch Road, Carryduff	Carryduff	0		0			
LA05/2018/1135/F	Approved - Not conditioned	Y	81 Ballynahinch Road, Carryduff	Carryduff	0		0		11	
		Y	Baronsgrange, Carryduff	Carryduff	0		0		116	0
LA05/2022/0634/F	Not Approved	Y	Lands at 615 Saintfield Road, Carryduff	Carryduff	0		0		30	
LA05/2023/0096/RM	Not Approved	Y	Lands at 644 Saintfield Road Carryduff	Carryduff	0		0		2	
LA05/2023/0598/F	Not Approved	Y	Meadowvale Park, Carryduff	Carryduff	0		0		110	
LA05/2021/0485/F	Not Approved	Y	Hotel Complex, Saintfield Road	Carryduff	0		0		10	
None	Not Approved	Y	Belfast Road, Dundonald	Dundonald					19	
		Y	Major Supermarket - Dundonald	Dundonald						
		Y	Millmount Road - Comber Road	Dundonald	0	Residential	0	Residential	17	0
		Y	Dunmurry / Belfast	Dunmurry					178	178
		Y	Carnreagh Road, Hillsborough	Hillsborough	0	Residential	0	Residential	50	0
		Y	114 - 118 Longstone Street, Lisburn	Lisburn	0		0		3	
		Y	Blaris Lands - Lisburn	Lisburn	0		0		1300	
		Y	Major Supermarket Distribution Centre	Lisburn	1	Distribution centre	0		0	
LA05/2021/0009/F	Not Approved	Y	LANDS ADJ TO FORTWILLIAM HOUSE OLD KILMORE ROAD MOIRA	Moira	0		0		36	

Lisburn & Castlereagh City Council

Committee:	Regeneration & Growth Committee
Date:	7 November 2024
Report from:	Head of Planning and Capital Development

Item for:	Decision
Subject:	Planning Service Improvement Plan

1.0 **Background**

1. The planning system in Northern Ireland has faced enormous change and challenge since the transfer of the function to local government in 2015. The resultant process changes, introduction of different ways of working and new technology have all impacted on performance and perception of how the planning system is working.

2. Performance improvement is a general duty of improvement that the Council is required to undertake. The Council must have regard, in particular, to make improvement in the exercise of its functions in terms of strategic effectiveness; service quality; service availability; fairness; sustainability; efficiency; and innovation.

3. The Council's Performance Improvement Plan sets out what we will do in the year ahead to deliver on our statutory responsibility referenced above. These 'duties' relate to sections 84(1), 85(2) and 89(5) of the Act, whereby we must make arrangements to secure continuous improvement; secure achievement of its improvement objectives; and exercise its functions so that any central government departmental specified standards are met.

4. The operation of the planning service is an area of focus for the Council this year in its performance improvement plan. A set of performance improvement objectives are set for the delivery of the development management function.

Key Issues

1. Whilst the need for continuous improvement in line with the Local Government Act is recognised, the draft Service Improvement Plan also takes account of the findings of a number of assurance audits carried out by the Council Audit team and an external audit by the NIAO into the delivery of planning in Northern Ireland. Regard is also had to the finding of the Public Accounts Committee Report that followed this.

2. The main focus for improvement is linked to the operation of the development management function and aimed at addressing key issues, namely:

   - Speed of decision making;
   - Reporting, governance and resilience aligned to reducing the cost burden to ratepayers;

- Communication with stakeholders; and
- Alignment of planning and sustainable growth interests.

3. The recommendation is that the planning service should aim to be within the top 25% performing local planning authorities within the next 24 months and that the Improvement Plan sets out the steps necessary to achieve this, whilst actively addressing the identified issues above.

2.0 **Recommendation**

Members are asked to note the content and reasons for developing the Service Improvement Plan and agree the actions arising to improve the service.

3.0 **Finance and Resource Implications**

There are no finance or resource implications at this stage. Should any implications arise out of the Action Plan further reports will be returned to the Committee.

4.0 **Equality/Good Relations and Rural Needs Impact Assessments**

4.1	Has an equality and good relations screening been carried out?	No
4.2	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out	N/A
4.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	No
4.4	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out.	N/A

Appendices: Appendix 2 – Draft Service Improvement Plan (November 2024)

Planning Service Improvement Plan

Introduction

The planning system in Northern Ireland has faced enormous change and challenge since the transfer of the function to local government in 2015. The resultant process changes, introduction of different ways of working and new technology have all impacted on performance and perception of how the planning system is working.

Customer requirements and expectations have also shifted. Land use planning is a local authority front line service and generates significant levels of public interest and participation. It is therefore befitting that performance and the level of service provided should be subject to continuous review and improvement.

Performance improvement is a general duty of improvement that the Council is required to undertake. The Council must have regard, in particular, to make improvement in the exercise of its functions in terms of strategic effectiveness; service quality; service availability; fairness; sustainability; efficiency; and innovation.

The legislation also sets out that for each financial year, the Council must set and work to achieve 'improvement objectives' relating to the areas outlined above.

The Council's Performance Improvement Plan sets out what we will do in the year ahead to deliver on our statutory responsibility referenced above. These 'duties' relate to sections 84(1), 85(2) and 89(5) of the Act, whereby we must make arrangements to secure continuous improvement; secure achievement of its improvement objectives; and exercise its functions so that any central government departmental specified standards are met.

The operation of the planning service is an area of focus for the Council this year in its performance improvement plan. A set of performance improvement objectives are set for the delivery of the development management function.

The Wider Improvement Agenda

In a report published 01st February 2022 the Northern Ireland Audit Office (NIAO) stated:

In our view, the planning system is not operating efficiently. Crucially, in many aspects, the system doesn't deliver for the economy, communities or the environment. NIAO regularly receives concerns about planning decisions, implying a lack of confidence in the way the system operates. In addition, costs consistently exceed income, and the system itself is being subsidised by both central and local government. It is simply unsustainable to continue in this way.

In a subsequent report published by the Public Accounts Committee (PAC) of the Northern Ireland Assembly it was stated that:

Having discussed its concerns with the Department, SOLACE and NILGA, the Committee was struck by the lack of accountability for poor performance. A system that allows all those involved to miss targets, without seeking improvements, is a system in chronic failure. The Committee is worried by the Department's misunderstanding of accountability, and was left with the impression that it is more interested in talking about issues, than taking the action needed to address them. This cannot continue, and the Committee expects the Department to *provide the Committee with a radical action plan and provide the successor Committee with an update on the improvements made in six months time.*

Both reports addressed a number of themes and made recommendations.

The following themes and recommendation from both the NIAO and PAC reports provide focus and are relevant to this Council for wider improvement of the service:

NIAO Recommendation

We recommend that the Department should coordinate an assessment of the key skills and experience gaps across the planning system. Where a common skills gap across multiple councils is identified, a plan should be developed to ensure that all councils have access to the skills they need to operate effectively. This plan should include assessments of different provision options.

PAC Recommendation 5

The Committee recommends that all those involved in decision-making ensure that processes are open and transparent, particularly where a high degree of interpretation has been exercised. The Department and councils should consider how checks on good record keeping, to ensure transparency, could be carried out effectively.

NIAO Recommendation

There is a need for full transparency around decision-making. We recommend that planning committees should ensure that minutes of meetings include details of the applications that are brought to committee as a result of a referral, who brought it to committee and outline the planning reasons why the application has been referred. We recommend that where a planning committee makes a decision contrary to planning officials' advice, the official minutes of the meeting should contain details of the planning considerations that have driven the decision.

PAC Recommendation 10

The Committee recommends that planning authorities regularly review past decisions to understand their real-world outcomes, impact on communities and the quality of the completed development.

NIAO Recommendation

We recommend that in instances where delegation rates fall below 90 per cent, councils should review their processes to ensure that they represent the best use of council resources.

NIAO Recommendation

Planning committees should ensure that they regularly review a sample of their previously determined applications, to allow them to understand the real-world outcomes, impacts and quality of the completed project. Councils should ensure that they review a range of applications, to ensure that it is not only focused on those applications that tell a good news story about how the system is working. Lessons learned from this process should be shared across all councils.

PAC Recommendation 11

The planning system must be financially sustainable and this requires an appropriate, long-term funding model. The Committee recommends that all those involved in delivering planning work together to achieve this. In the short term the Department should take the lead on bringing forward legislation on planning fees as a matter of urgency

Strategic Theme and Areas for Focus

The main focus for improvement is linked to the operation of the development management function and aimed at addressing key issues, namely: -

- Speed of decision making;
- Reporting, governance and resilience aligned to reducing the cost burden to ratepayers;
- Communication with stakeholders; and
- Alignment of planning and sustainable growth interests.

The recommendation of the Head of Planning and Capital Development is that the planning service should aim to be within the top 25% performing local planning authorities within the next 24 months and that the Improvement Plan should set out the steps necessary to achieve this, whilst actively addressing the identified issues above.

This Improvement Plan is in two parts, firstly the 'Strategy' element, which sets out the strategic themes and areas of focus. The second part will be formed of a detailed Action Plan, which is to be produced in draft form for consideration by the relevant committee(s).

This Action Plan will set out a range of actions across all themes aimed at delivering on the strategic aims. The Improvement Plan is primarily aimed at the Development Management (DM) function, although there is cross over with other service elements, including planning enforcement and Local Development Plan. As such, the content of the Plan will be limited to primarily addressing the identified DM related issues.

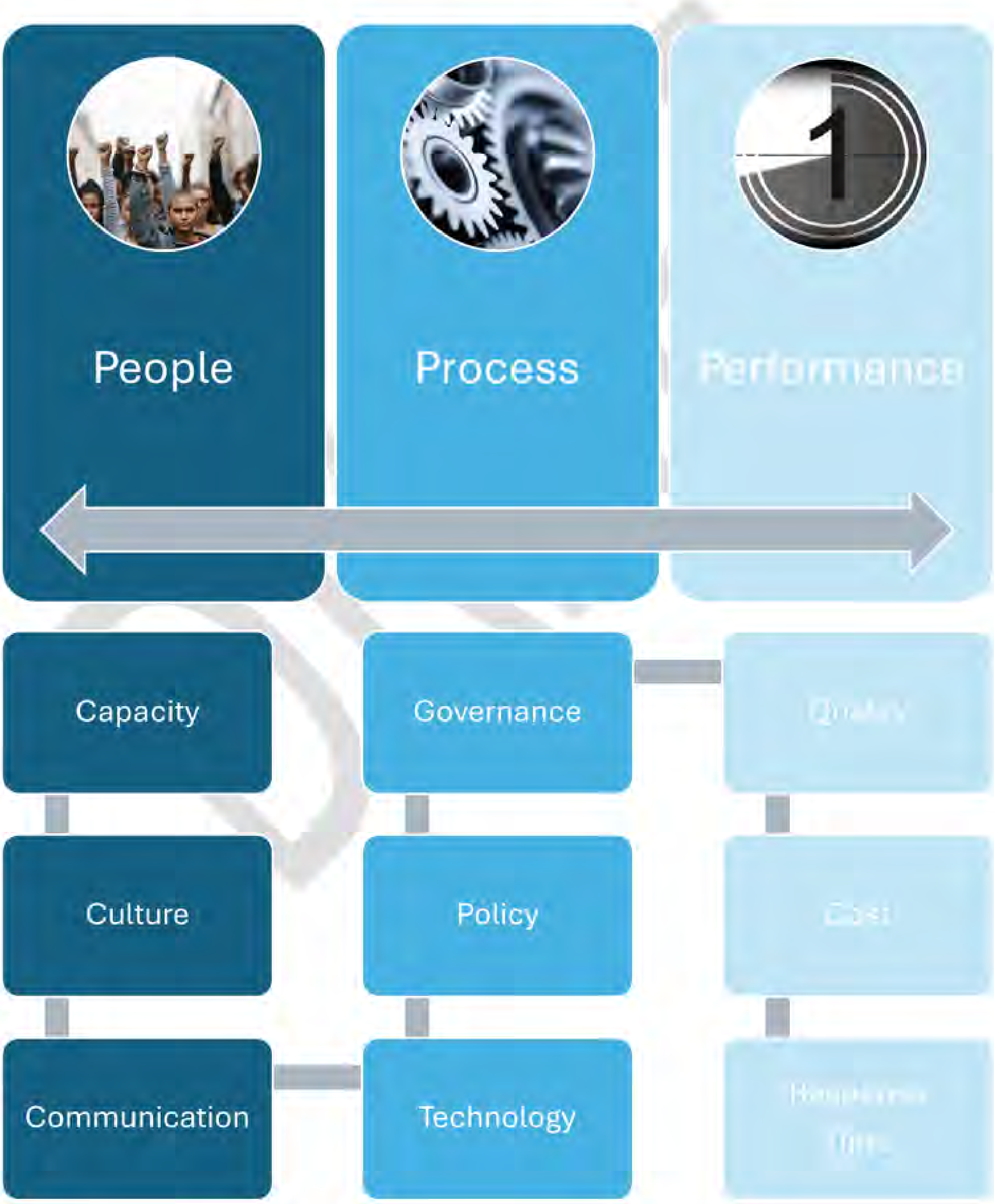
Other aspects of service area reform will of course be subject to ongoing review alongside this process, but the scope of this Plan needs to be more focused in order for it to be deliverable in the necessary timescales.

Strategy

Other aspects of service area reform will of course be subject to ongoing review alongside this process, but the scope of this Plan needs to be more focused in order for it to be deliverable in the necessary timescales.

Strategic Themes

The Improvement Plan will cover a wide variety of improvements across the planning service, grouped under three key areas.



People – including customers, stakeholders, Members, and staff. Key elements will include how we communicate, accessibility to information, learning and development, the planning website, and a review of the customer journey collaborating with customer services to provide the best service possible to service users and stakeholders.

Process – including internal processes and development. A review of 'how and why we do things' to work smarter and more efficiently. We will put in place a structure of support and training to empower officers to make decisions in a timely and confident manner with a focus on enabling quality decision making.

Performance – including a review of benchmarking opportunities, and smart performance measures around customer service and satisfaction.

Action Plan

The action plan is designed with the aim of the service being within the top 25% performing local planning authorities within the next 24 months. The timescales are designed to take account of this timeline.

People

Capacity

Action 1

Develop a professional officer training programme in consultation with RTPI and IPI to build resilience in the capacity of the service through a training programme (Q2 - Year 1).

Action 2

Refinement of a Member training programme in consultation with HR&OD for the Planning Committee that builds the capacity of Members in their role as decision makers (Q3 – Year 1).

Culture

Action 1

Embed a culture of good customer service. All officers to attend customer service training (by the end of Q3 – Year 1) and to be repeated annually.

Action 2

Be responsive to requests for information. Develop a Key Performance Indicator for duty planner enquiries to test that we are responding to customer needs (Q2 – Year 1).

Communication

Action 1

Develop a stakeholder forum to seek feedback on how the service is operating (Q4 – Year 1)

Action 2

Undertake a review and update the planning section of the website to assist stakeholders with automated updates on the planning processes within the Council Area (Q2 – Year 2).

Process

Policy

Action 1

Prepare Development Management Handbook with Protocols for handling applications to ensure consistency of approach for planning officers (Q4 – Year 1).

Action 2

For transparency and simplicity in decision making, make the Local Policy Plan to remove the duplication of policy that arises from having to take account of historical local development plans in the decision making process (Q4 – Year 2).

Action 3

Engage with DfI Roads and NI Water to agree Standing Advice for Planning applications to remove the need for duplicate consultations (Q2 – Year 2).

Action 4

Implementation of draft validation checklist to improve the completeness of applications before they are submitted to the planning process (Q1 – Year 1).

Technology

Action 1

Continue to develop digital capacity and automation through the Planning Portal (on-going).

Action 2

Design and implement automated planning advice through the development of Chatbot (in consultation with the Portfolio Office) as a pilot project (Q3 – Year 2).

Governance

Action 1

Develop an annual Audit Plan in consultation with the Governance and Audit team to test resilience of decision making and processes (Q1 Year 1).

Performance

Quality

Action 1

Review 10% of delegated planning applications bi-annually to ensure consistency of the decision making and to validate that the correct policies are being applied by officers in the decision making process (linked to Audit Plan) (Q1 - Year 1).

Action 2

Review a sample of planning applications decided by the planning committee from the previous two years to review the outcome of the decision making process and disseminate learning for officers and Members (Q4 – Year 1).

Action 3

Report annually the outcome of planning appeal decisions to the planning committee and disseminate learning for officers and Members (Annually).

Cost

Action 1

Undertake a review of the costs linked to judicial review proceedings (Q4 – Year 1).

Action 2

Develop Protocol for Section 76 planning agreements by collecting all the legal costs linked to a planning application process (Q1 – Year 1) – **complete**

Action 3

Scope and prepare brief in partnership with other local Councils to appoint a consultant to benchmark for costs recovered from the planning application process. The evidence from the report will be used to facilitate discussions with the Department on putting the finance of planning process on more sustainable footing (Q4 – Year 1).

Response Time

Action 1

Reduce the % of older applications that are over 18 months old (recruiting additional staff to assist with this. Lower targets in Q1&Q2 while staff fill posts and are being trained to fill capacity)

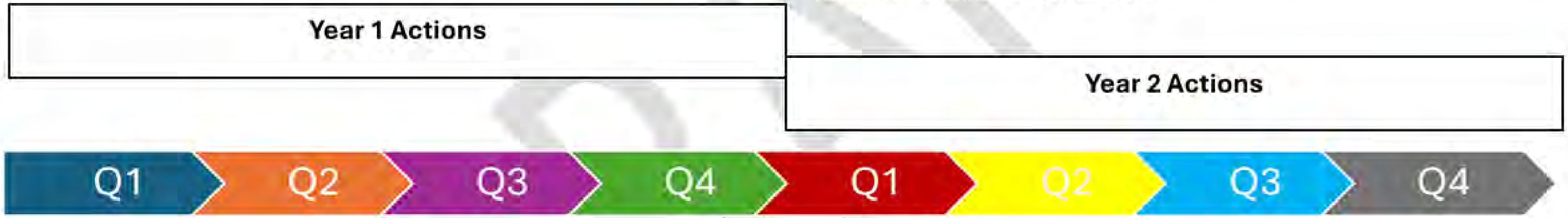
Action 2

Local planning applications processed within an average of 22.5 weeks.

Planning Timeline of Actions

People			Process			Performance		
Capacity	Culture	Communication	Policy	Technology	Governance	Quality	Cost	Time
Action 1	Action 1	Action 1	Action 1	Action 1*	Action 1	Action 1	Action 1	Action 1
Action 2	Action 2	Action 2	Action 2	Action 2		Action 2	Action 2	Action 2
			Action 3			Action 3**		
			Action 4					

Table 1: Timescale for Actions



*On-going actions

** Annually

Summary Actions Delivery Plan

Themes	Specific Area	Actions	Detail of Action	Timescale
People	**Capacity**	Action 1	Develop a professional officer training programme in consultation with RTPI and IPI to build resilience in the capacity of the service through a training programme	Year 1 – Q2
		Action 2	Refinement of a Member training programme in consultation with HR&OD for the Planning Committee that builds the capacity of Members in their role as decision makers	Year 1 – Q3
	Culture	Action 1	Embed a culture of good customer service. All officers to attend customer service training and to be repeated annually	Training by end of Year 1 – Q3
		Action 2	Be responsive to requests for information. Develop a Key Performance Indicator for duty planner enquiries to test that we are responding to customer needs	Year 1 – Q2
	Communication	Action 1	Develop a stakeholder forum to seek feedback on how the service is operating	Year 1 – Q4
		Action 2	Undertake a review and update the planning section of the website to assist stakeholders with automated updates on the planning processes within the Council Area	Year 2 – Q2

Themes	Specific Area	Actions	Detail of Action	Timescale
Process	**Policy**	Action 1	Prepare Development Management Handbook with Protocols for handling applications to ensure consistency of approach for planning officers	Year 1 – Q4
		Action 2	For transparency and simplicity in decision making, make the Local Policy Plan to remove the duplication of policy that arises from having to take account of historical local development plans in the decision making process	Year 2 – Q4
		Action 3	Engage with DfI Roads and NI Water to agree Standing Advice for Planning applications to remove the need for duplicate consultations	Year 2 – Q2
		Action 4	Implementation of draft validation checklist to improve the completeness of applications before they are submitted to the planning process	Year 1 Q1: Development of a validation checklist Q2: Implementation of the validation checklist Q3 & Q4: Proportion of invalid applications returned within 5 working days Q3 75% Q4 90%

	Technology	Action 1	Continue to develop digital capacity and automation through the Planning Portal	Ongoing
		Action 2	Design and implement automated planning advice through the development of Chatbot (in consultation with the Portfolio Office) as a pilot project	Year 2 – Q3
	Governance	Action 1	Develop an annual Audit Plan in consultation with the Governance and Audit team to test resilience of decision making and processes	Year 1 – Q1

Themes	Specific Themes	Actions	Detail of Action	Timescale
Performance	**Quality**	Action 1	Review 10% of delegated planning applications bi-annually to ensure consistency of the decision making and to validate that the correct policies are being applied by officers in the decision making process (linked to Audit Plan)	Year 1 – Q1
		Action 2	Review a sample of planning applications decided by the planning committee from the previous two years to review the outcome of the decision making process and disseminate learning for officers and Members	Year 1 – Q4
		Action 3	Report annually the outcome of planning appeal decisions to the planning committee and disseminate learning for officers and Members	Annually
	Cost	Action 1	Undertake a review of the costs linked to judicial review proceedings	Year 1 – Q4
		Action 2	Develop Protocol for Section 76 planning agreements by collecting all the legal costs linked to a planning application process	Year 1 – Q1 Complete

		Action 3	Scope and prepare brief in partnership with other local Councils to appoint a consultant to benchmark for costs recovered from the planning application process. The evidence from the report will be used to facilitate discussions with the Department on putting the finance of planning process on more sustainable footing	Year 1 – Q4
	Response Time	Action 1	Reduce the % of older applications that are over 18 months old (recruiting additional staff to assist with this. Lower targets in Q1&Q2 while staff fill posts and are being trained to fill capacity)	Year 1 Q1: 20%, Q2: 40%, Q3: 70%, Q4: 90%
		Action 2	Local planning applications processed within an average of 22.5 weeks.	Year 1 Q1: 42.5, Q2: 37.5, Q3: 30, Q4: 19.5

Lisburn & Castlereagh City Council

Committee:	Regeneration and Growth
Date:	7 November 2024
Report from:	Director of Regeneration and Growth

Item for:	Decision
Subject:	New Department for Economy Proposals – Sub-Regional Economic Strategy

1.0 **Background**

1. In October 2024 the Department for the Economy (DfE) published proposals to establish a new Sub Regional Economic Plan for Northern Ireland. The proposals describe a locally-led approach to deliver regional balance based on partnership working.

2. Councils will be required to establish new Local Economic Partnerships (LEPs), involving central government, Invest NI, Councils, and local stakeholders. The Department will provide financial resources for locally based initiatives and Invest NI will be reorientated towards developing local economies. Invest NI's Regional Offices are to work with Councils at the local level and take on more functions, and more staff.

2.0 **Key Issues**

1. The proposals (appended to this report) articulate an Economic Vision and funding opportunities based on four key imperatives
   - Increased Productivity
   - More Good Jobs
   - Regional Balance
   - Decarbonisation

2. Economic indicators associated with these four areas of focus place only two Council areas - Lisburn & Castlereagh and Antrim & Newtownabbey – as showing strong to fair performance across all main priorities. This relative position of economic strength is likely to be a factor in determining the allocation of future levels of funding ie those that perform better (such as Lisburn & Castlereagh) may receive less funding in terms of economic need. The proposals state that funding to LEPs will be determined by need and the formula will be "co-designed with Councils" by December 2024. Capital and Resource funding will be available, and there is potential to include Financial Transactions Capital depending on the demand from Councils.

3. The new Economic Plan will have three delivery strands:
   - Formation of new LEPs with dedicated DfE funding over 3 years of £45m for NI
   - Enhanced Invest NI sub-regional role with local targets
   - Realignment of Departmental policies and programmes to drive local growth

4. There will be flexibility regarding the geographic area and structure of these partnerships. Each Council will be able to decide whether their area is the extent of the LEP, or they can choose to collaborate with other Council areas to create a bigger partnership. It will also be for Councils to decide whether they build on existing partnerships or create new ones.

5. The LEPs are to reflect "the full breadth of local stakeholders". DfE will assist Councils in shaping these with supporting guidance, and Invest NI will provide advice through its Regional Teams. Invest NI and the Department will support the LEP in the identification of suitable projects and in developing proposals that access dedicated funding. There will also be the opportunity to utilise the services of Ulster University Economic Policy Centre (UUEPC).

6. Invest NI will enhance the presence and functions in regional offices by expanding from four offices to five, increasing staffing levels and leadership in each, and playing an advocacy role for LEPs across government. Invest NI will implement its new strategic approach from now, with the new structure to be fully operational by April 2025.

7. A new Regional Strategic Agenda will set a target to increase the percentage of investments outside the Belfast Metropolitan Area (which includes Lisburn & Castlereagh), from an average of 56% over the last 5 years, to 65% at the end of the Invest NI Business Strategy in 2026/27.

8. The inclusion of this target could have the potential to direct Invest NI activity in terms of Investment and FDI projects away from the Lisburn & Castlereagh Council area and the surrounding Belfast Metropolitan Area, towards NI's other regions. No clarity has been provided as to how this policy might operate or how the target has been determined. It is suggested that the Committee may want to scrutinise these elements of the new proposals in more detail when more guidance is received, including any policy analysis by the Department in the context of Section 75 of the Northen Ireland Act.

9. DfI's proposed next steps are:
   - **Oct 24 – Dec 24 –** DfE and Invest NI to engage with Councils and local stakeholders to support the formation of the Local Economic Partnerships, to be established between October and December 2024. DfE to co-design the funding allocation model with stakeholders.
   - **Jan 25 – Mar 25 -** Local Economic Partnerships to bring forward projects that align with the key priorities; Productivity, Good Jobs, Reduce Carbon Emissions and Regional Balance. Proposed projects should be agreed by the partnerships and brought to the Department by end March 2025, and funding drawn down from April 2025.
   - **Apr 25 – Mar 28 –** DfE and Invest NI to review and approve proposed projects. Approved projects will be funded for delivery through dedicated funding.

10. It should be noted that this timeline is extremely ambitious and does not appear to consider the availability of the necessary resources within local government given the existence of other competing priorities and contractual obligations (such as Go Succeed or Belfast Region City Deal). In addition, local government business

processes and those of partner organisations in terms of project and programme appraisal will not easily fit with this stated timeline.

11. A workshop for Councils, DfE and Invest NI took place in October 2024 to discuss the proposals and options around some of the details. A copy of the presentation is appended to this report (**see Appendix),** which includes more information on the Department's emerging plans.

12. In parallel to the new proposals, but inextricably linked to them, Invest NI has published its draft 3-year Business Strategy 2024-27 document for consultation. A copy of this document is appended to this report (**see Appendix**). The consultation closes on the 14 November and can be accessed by following the link below

    Invest Northern Ireland Business Strategy 2024-27 Overview Feedback Form

    The Invest NI consultation provides an opportunity for the council to respond to the issues raised in the new DfE Sub-Regional Economic Plan proposals, and the Council's draft response is appended to this report for Members' consideration (**see Appendix**).

Recommendation

It is recommended that the Committee:

1. Considers the DfE proposals to establish a sub-regional economic plan as outlined above and in the appendices, and agrees that officers develop local delivery plans in line with the formal guidance when received, with further reports provided to the Committee in due course.
2. Considers the Invest NI draft 3-year Business Strategy 2024-27 as detailed in the appendix.
3. Considers and agrees the draft Council response to the Invest NI consultation document, providing any additional comments for inclusion in the final response prior to submission by 14 November.

4.0 **Finance and Resource Implications**

No costs at this time.

5.0 **Equality/Good Relations and Rural Needs Impact Assessments**

5.1	Has an equality and good relations screening been carried out?	No
5.2	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out. The screening will be completed once the new proposals have been developed.	
5.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	No

5.4	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out. The screening will be completed once the new proposals have been developed.

Appendices:	**DfE & Invest NI – Sub Regional Economic Plan:** Appendix 3a - DfE & Invest NI Sub-Regional Plan (Oct24) Appendix 3b - DfE & Invest NI Sub-Regional Plan – Technical Annex (Oct24) Appendix 3c - DfE/Invest NI/Councils/NILGA Co-Design - Sub-Regional Plan Workshop – Tues 15th Oct 2024 **Invest NI- 3Yr Business Strategy:** Appendix 3d - Invest NI – 3Yr – Business Strategy Document 2024-2027 Appendix 3e - Draft Consultation Response to Invest NI – 3Yr Business Strategy

Invest Northern Ireland

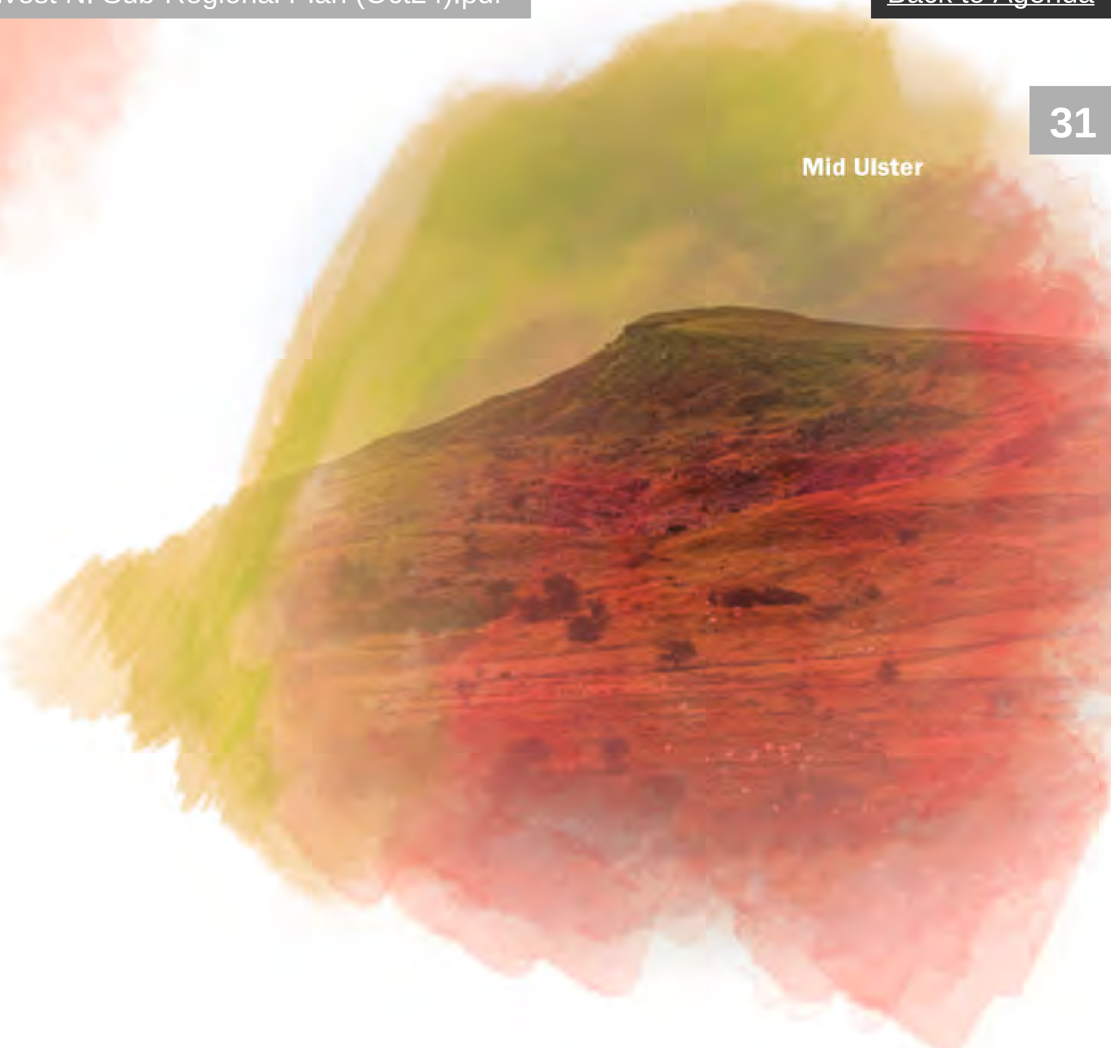
Department for the Economy
An Roinn Geilleagair
www.economy-ni.gov.uk

Sub-Regional Economic Plan

OCTOBER 2024

Mid & East Antrim

Sub-Regional Economic Plan
OCTOBER 2024



Contents

Derry City & Strabane

Ministerial Foreword

This document sets out a new strategic approach to economic policy.

It is a locally-led approach which places regional balance at its heart, and which enshrines partnership working.

Local communities will be empowered to identify their own economic priorities.

Through local partnerships, central government, Invest NI, Councils, and our network of education providers and civic society, we will work together to identify the main barriers to economic development, and the interventions that will unlock the area's potential.

Interventions could involve support for local clusters, investment in skills programmes, or quicker planning decisions.

This may necessitate the recalibration of existing government programmes and budgets, supplemented by additional funding from my department.

As part of this new strategic direction, Invest NI will be reorientated towards developing local economies.

Invest NI's Regional Offices will work hand-in-hand with Councils and take on more functions, and more staff.

Working in partnership with my department, the Invest NI Board and Chief Executive will oversee this profound change in its approach, with clear and ambitious targets agreed to monitor performance.

In working together like this, in the spirit of true co-design and collaboration, we can start to reverse historical imbalances, and deliver prosperity throughout the region.

Introduction

We welcome the publication of the Minister's Sub-Regional Economic Plan and its ambition to deliver improved regional balance across Northern Ireland. Our teams have worked closely with Departmental colleagues to co-design the plan.

Delivering this Sub-Regional Economic Plan will be a key feature of our new Business Strategy, which we will shortly publish. This strategy will see Invest NI introduce a new Regional Approach that will include an expansion of our regional footprint and increase our capacity and capability in the regions.

We will do more to collaborate with partners and stakeholders in the regions to promote and support local economic development by playing a greater leadership and advocacy role, both in, and for, our regions.

Our focus will be on building out a more regionally balanced, sustainable, productive, and prosperous Northern Ireland economy.

Through enhanced targeting and improved client service and supports, we will drive greater economic activity across Northern Ireland, achieve higher levels of entrepreneurship, new firm formation, R&D and innovation, export growth and productivity.

If you are a business working anywhere in Northern Ireland, with dreams of selling outside Northern Ireland and going to the next level, we will be there to help, advise and guide you.

By focusing on places and partnerships in collaboration with regional stakeholders, we will co-design solutions tailored to regional needs and accelerate the process of addressing deep seated economic challenges.

Invest NI has made regional development a key priority for the organisation, and we are confident that we can make a significant contribution to the achievement of the Minister's Economic Vision for every part of Northern Ireland.

John Healy
Chair
Invest NI

Kieran Donoghue
Chief Executive Officer
Invest NI

Economic Vision

For too long our economy has been weighed down by structural weaknesses that have limited our ability to reach our full potential. Those weaknesses restrict opportunities for all in society to both contribute and benefit from true economic success. Ultimately, we want to improve the quality of life for all our people and this is where our four objectives come together to support real, life-changing outcomes for people. We want to see employment providing better rewards and to be fulfilling and accessible, we want to see people benefit from better jobs wherever they live, and we want those jobs and the lifestyles they support to be greener.

Productivity has been below the UK average for decades and although the gap has narrowed in recent years (from 17.4% in 2019 to 13.2% in 2022), it ranks at 10th amongst the twelve UK regions in 2022. The productivity gap is even more pronounced when compared to the rest of Ireland with the 2023 Northern Ireland Productivity Dashboard (based on 2021 data) reporting that output per hour worked in the Republic of Ireland was 8% higher than the UK average.

While almost 94% of employees are in permanent jobs with guaranteed hours, approximately 11,000 employees are employed on zero-hours contracts. 84% of working age employees in 2023 were paid on or above the Real Living Wage (RLW) rate, a proportion below most UK regions. Variation in pay varies across sectors and industries. The average pay for sales assistants and retail cashiers is below the RLW whereas IT professionals receive more than double the RLW rate.

Sub-regional disparities remain persistent. The employment rate (including students) in 2022 in Derry City & Strabane is 10 percentage points lower than Mid Ulster. Mid & East Antrim lags almost 16 percentage points behind Lisburn & Castlereagh for Level 4+ tertiary education attainment rates. Fermanagh & Omagh emits the largest share of greenhouse gas emissions yet generates not only the most renewable energy, but is almost 50% ahead of the next best performing LGD.

Greenhouse gas emissions have reduced, seeing a 26% reduction since 1990 while the Republic of Ireland saw a 7.2% increase in emissions over the same period. However, our reduction compares to a fall of 53% in England, 51% in Scotland and 36% in Wales. Our emissions reduction needs to go much further and faster if the targets set out in The Climate Change Act are to be achieved. Net Zero by 2050 or earlier is not just a legal imperative but a moral obligation.

Recognising Imbalance

Disparities across the region in economic performance have been getting worse; it's time to reverse this

Our whole economy faces a number of challenges with issues such as employment, productivity, disposable income, and economic inactivity all areas where we perform poorly compared to our nearest neighbours. These disparities are even more pronounced at a sub-regional level. When looking at the highest and lowest performing council areas:

- Labour productivity in Belfast is 31% higher than in Derry City & Strabane.
- Median wages in Belfast are 44% higher than in Ards & North Down.
- The employment rate in Mid Ulster is 10 percentage points higher than Derry City & Strabane.
- Export intensity in Newry, Mourne & Down is 11 percentage points higher than both Antrim & Newtownabbey and Ards & North Down.
- The tertiary educational attainment rate in Lisburn & Castlereagh is 15.9 percentage points higher than in Mid & East Antrim.
- The rate of employees stating they were in secure employment in Mid & East Antrim is 5 percentage points higher than in Causeway Coast & Glens.

Many of these areas suffer from an economic disadvantage despite all having potential for growth, and in many cases, there are areas of inequality common across neighbouring councils which suggests that collaborating and working together to tackle the problems at scale could be more effective. Even those that are doing relatively well compared to others still fall below the NI average due to the distortive effort of one or two areas that are disproportionately far ahead.

LGD RANK

HEADLINE INDICATOR	Antrim & Newtownabbey	Ards & North Down	Armagh, Banbridge & Craigavon	Belfast	Causeway Coast & Glens	Derry City & Strabane	Fermanagh & Omagh	Lisburn & Castlereagh	Mid & East Antrim	Mid Ulster	Newry, Mourne & Down
Labour Productivity (output per filled job, 2022)	3	10	8	1	9	11	6	4	5	2	7
Median Wages (gross weekly pay by place of work, 2023)	2	11	3	1	10	7	6	5	8	4	9
Sub-Regional Employment Rate (including students; 16-64)	5	8	2	10	9	11	7	3	4	1	5
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	3	2	7	1	9	8	11	4	6	10	5

1 2 3 4 5 6 7 8 9 10 11

Performance of councils against the indicator is ranked from 1 (highest) to 11 (lowest). The three highest performing are highlighted in green, the three lowest in red

Considering the four headline indicators, only two council areas - Antrim & Newtownabbey and Lisburn & Castlereagh - show strong to fair performance across all main priorities. Mid Ulster performs well on productivity, employment and median wages although its proportional greenhouse gas emissions are significantly higher than other LGDs. Causeway Coast & Glens, Derry City & Strabane, and Fermanagh & Omagh mostly lag the NI average across these themes and are in need of focused support.

Area performance on some measures can be affected by adjacency to major hubs of economic activity. Weekly median wages in Ards and North Down are significantly higher for those living in the area compared to those working there, a reflection of its status as a major commuter area of Belfast. Productivity however remains significantly lower than average in the region and improving this will be important in maximising opportunities and improving outcomes for as many people as possible.

Areas performing relatively well such as Antrim & Newtownabbey face challenges too, such as a need to increase export intensity, investment is required in the near future for industrial land, and there is ongoing competition with Belfast for labour/skills. Although its performance in a number of areas is strong, Belfast continues to struggle with poor labour force participation and low employment rates amongst its resident working age population. There is also evidence that employment is comparatively less secure for those that are in work than in other areas.

Causeway Coast & Glens, Derry City & Strabane, and Fermanagh & Omagh produce more renewable energy, and their export intensity is much higher than the peripheral councils. Mid Ulster is a manufacturing powerhouse and yet has had the lowest rate of new jobs from Foreign Direct Investment. Despite the lowest tertiary attainment rates, Mid & East Antrim ranks among the highest areas for people in work, the lowest economic inactivity level, and more employees earning above the real living wage and who feel more secure in their job. Armagh, Banbridge & Craigavon, without the universities, has a proportional spend on R&D by businesses equalled only by Belfast.

In other words, we need to drill down beyond the data, and there are other factors in play. There are some macro level issues that the entire region faces that permeate into these indicators:

- transport links, or rather the lack of (particularly west of the Bann)
- the lack of supply of industrial land and property
- investment required in water and sewerage
- slow energy connection provision
- traditionally low paying sectors such as tourism and agriculture predominant in certain council areas
- ageing population; and
- health issues and care responsibilities/ childcare costs preventing the economically inactive entering the workforce.

This demonstrates the need for a joined-up approach across government; 'economic interventions' alone will not be enough.

Some of the indicators show considerable strengths. Each council area has opportunities for growth, assets to 'sweat', city and growth deal projects to cluster around as anchors for innovation and tourism, further education colleges working with employers, and cross-border and east-west dual market access to exploit.

Tackling Imbalance

Fermanagh & Omagh

A profound change in how we deliver economic development is required. A change in structure. A change in culture. To support this change there are three key strands to delivery.

Formation of new **Local Economic Partnerships** with dedicated funding of £45m

Enhanced **Invest NI** sub-regional role with local targets

Realignment of Departmental policies and programmes to **drive local growth**

Local Economic Partnerships

Empowering local communities is fundamental in building a more regionally balanced economy; one characterised by inclusive, sustainable, and thriving local economies where people want to live and work, and where employers want to invest. At a local level this means attracting investment and capitalising on emerging opportunities that can create high-quality jobs for local people.

To ensure there is full engagement and involvement of local stakeholders, the Department will be inviting councils to establish Local Economic Partnerships supported with dedicated funding of £45m.

The importance of flexibility regarding the geographic area and structure of these partnerships is fully recognised. They must be right for local circumstances and that means there will not be a standardised approach – each council can decide whether their area is the extent of the Local Economic Partnership, or they can choose to collaborate with other council areas to create a bigger partnership.

It will also be for councils to decide where they build on existing partnerships such as Labour Market Partnerships or Community Planning Partnerships and integrate the Local Economic Partnership with those or keep it separate.

Whichever approach is chosen, it is essential to ensure that the Local Economic Partnership reflects the full breadth of local stakeholders. DfE will assist councils in shaping these with supporting guidance, and Invest NI will provide advice through its Regional Teams and their knowledge of local networks.

Invest NI and the Department will support the Local Economic Partnership in the identification of suitable projects and in developing proposals that access dedicated funding. Single points of contact for stakeholders, clear two-way communication channels, and true co-production will be put in place. There will also be the opportunity to tap into expert knowledge provided by the Ulster University Economic Policy Centre (UUEPC).

Ultimately however, projects will be agreed and prioritised by the Local Economic Partnership – local decision making is at the heart of this new approach.

UUEPC is currently engaged in an independent research project, "Delivering balanced regional growth in Northern Ireland", due to be published by the end of 2024. At that stage, at the discretion of the Local Economic Partnerships, the UUEPC researchers will be keen to discuss their findings and recommendations with the Local Economic Partnerships, and any implications these may have for the development of local actions.

To support Local Economic Partnerships, £45m of dedicated funding will be provided over the next three years to kickstart this new approach.

It will be used to deliver local projects identified by Local Economic Partnerships that seek to improve productivity, to raise median wages, to increase the employment rate and to lower economic inactivity, and to take strides towards delivering Net Zero and industrial decarbonisation. Projects funded will depend on local economic priorities and may differ between different council areas.

Belfast City

The funding is not the answer to all issues; it will not close disparities in isolation. It is a small first step in building better partnerships with councils and putting more control in the hands of local decision-makers on economic development. Learning what works best will take some time and we will listen to councils and others as we progress this work to ensure we maximise the impact of spending. It also offers the Department the opportunity to work with other public sector funders to align sources of funding to deliver greater impact.

Funding to Local Economic Partnerships will be determined by need and this formula will be co-designed with councils by December 2024. Capital and Resource will be available, and there is potential to include Financial Transactions Capital depending on the demand from councils. Support from Invest NI Regional Offices to each Local Economic Partnership will be available.

Refocused Invest NI

Regional development is a key priority within Invest NI's new strategic approach and the organisation will be restructured to ensure delivery in line with the Minister's Economic Vision. Invest NI has a fundamental role to play, and it will implement a new approach from October 2024 onwards with the new structure fully operational by April 2025.

Lisburn & Castlereagh

A new **Regional Strategic Agenda** will drive collaboration through greater partnership working, measured with new ambitious targets. Central to this will be a target to increase the percentage of investments outside the Belfast Metropolitan Area[1], from an average of 56% over the last 5 years, to 65% at the end of the Invest NI Business Strategy in 2026/27.

Invest NI will significantly enhance the presence and functions in regional offices by expanding from four offices to five, increasing staffing levels and leadership in each, and playing a greater advocacy role for Local Economic Partnerships to ensure their voices are heard across government.

The introduction of a new **Regional Property Programme** will facilitate higher levels of business investment across the regions, and the integration of City & Growth Deals paired with new bespoke regional value propositions will underpin the Regional Strategic Agenda, supporting regions in becoming more attractive for local and FDI investment.

Current programmes, such as Ambition to Grow and Supporting Women, will be targeted in key regions, and a new Business Innovation Grant will be introduced. Regional cluster strengths will be prioritised and multi-agency cross-border collaborative working on green tech, clusters, and female entrepreneurship will be advanced. Regional offices will lead an enhanced R&D call.

The new approach will deliver more innovative start-ups, strengthen established firms, grow the regional base of export focused companies, increase FDI activity, and only support jobs above the Real Living Wage with good contractual conditions.

Invest NI Headquarters will provide specialist support, advice, and expertise, meaning that the whole organisation is reorientated towards delivering local economic priorities.

1 Belfast Metropolitan Area includes the Belfast, Antrim & Newtownabbey, Ards & North Down, and Lisburn and Castlereagh council areas.

DfE New Approach

Addressing economic disparities and inequalities at sub-regional level will be considered when developing all macro interventions. Enhanced regional competitiveness must not come at the expense of sub-regional balance. Utilising unique and bespoke solutions for place-based persistent problems will be developed alongside macro initiatives. Empowerment of localities and places will be at the forefront of regional balance. Building economic capacity and capability will start at local level. The new norm will be more balanced public sector investment, staff located and working in the regions, co-designing solutions, and strengthened local, sub-regional and national collaboration.

DfE will restructure to deliver. Additional staff in post, streamlined points of contact for stakeholders, and making central advice, analysis, and specialist support available. Advocating for local needs across government to build a coalition to deliver results.

Delivery not process, focusing on impact, additionality and making the most of limited resources. Targeted funding to ensure effective delivery, and flexibility to respond to new challenges rapidly.

The Department will establish a new Regional Balance Unit to work across DfE to mainstream regional balance. It will support the Local Economic Partnerships and Invest NI to drive effective delivery of locally chosen actions. The team will work across DfE and its partners, NICS, UK, and Irish government departments and agencies to press the case for local issues, to harness synergies in approach, and to bring more cohesion to public sector interventions.

This new direction of travel will be rooted in all we do

Sub-Regional Economic Plan

- Local Economic Partnerships set up to empower local stakeholders to harness their potential
- £45m of dedicated funding to kickstart actions and underpin the new approach
- Structural reform of DfE & Invest NI to ensure that local voices are heard and championed

Higher Education

- Magee Taskforce to increase Ulster University's Derry~Londonderry campus to 10,000 students
- Support a strong higher education offering in our Further Education Colleges, including through partnerships between Colleges, QUB, UU and OU
- Partnerships with City & Growth Deals to increase R&D and innovation outside Belfast

Further Education

- Having a curriculum offer for the delivery of professional and technical skills which is tailored to local business and learner needs. Supporting local employers by providing business development and innovation expertise
- Encouraging those with no or low qualifications to participate in education to improve their economic opportunities
- Reduce educational disadvantage and barriers to entry and qualification at local level, supporting progression through further and on to higher education or employment

Tourism

- Tourism Partnership Board refining Tourism Action Plan to ensure local focus
- Tourism NI will develop local action plans based on community strengths and potential
- Tourism NI will pilot a sub-regional Destination Stewardship Plan in 2025

Entrepreneurship & Enterprise

- Support closer partnership working between Invest NI and Go Succeed through a revitalised Invest NI regional office network
- Support greater participation of females and other underrepresented groups in entrepreneurship
- Support Local Economic Partnerships in developing cross-border partnerships and applying to competitive funds

City & Growth Deals & Telecoms

- City & Growth Deals to deliver world class innovation and tourism projects
- Accelerated delivery in 2025 with supporting pilot actions linked to Local Economic Partnerships
- Project Gigabit to provide near universal gigabit access

FDI & Invest NI Investments

- Incentivise delivery of Foreign Direct Investment and increase proportion of Invest NI investments outside of Belfast Metropolitan Area
- Develop updated Value Propositions for council areas and sub-regions
- Work with DETE to develop an MoU on all island economic priorities

Energy

- Develop an energy one stop shop to provide consumers, communities and local businesses with a single, trusted source of energy support, education and advice
- Deliver community benefit through a pathfinder community energy project and widen to support local ownership of renewable energy delivery projects
- Establish an Enhanced Investment Zone to harness £150m of available funding focusing on green technologies and skills

Inclusive Economy

- Work with Community Wealth Building Partnerships in Larne & the North West; Implement the Social Enterprise Action Plan to drive greater benefit at community level
- Co-design legislative changes to enhance local community owned Credit Unions; Consumer Council to examine the feasibility for a disability benefit linked loan pilot with Credit Unions
- Participate in cross-government People & Places pilot schemes in North Belfast and Derry~Londonderry

Innovation & Clusters

- Enhanced R&D Call led by business clinics in Invest NI Regional Offices
- Agree MoU with Innovation UK to deliver place-based actions
- Further develop regional clusters of economic activity in line with Sectoral Action Plans published in June 2024

Skills & Apprenticeships

- Skills Fund initiatives to develop childcare workforce, boost SME productivity, and support green skills, targeted at a local level
- Pre-Apprenticeship Academies to meet local skills demands. Apprenticeship Inclusion Challenge Fund. Skills academies to support SMEs are planned such as childcare, robotics and automation and welding
- Skill Up provides accessible online learning at colleges and universities, with flexible training opportunities available to all

Cross Border

- Develop North/South Fintech corridor to increase collaboration and cooperation
- Examine regulatory landscape to support cross-border financial services
- Review MRPQ/data transfer landscape to facilitate fully functioning all-island economy

Next Steps

Oct 24 – Dec 24

Over the coming months the Department and Invest NI will continue to engage with councils and local stakeholders to support the formation of the Local Economic Partnerships, which will be established between October and December 2024. During this time, the Department will co-design the funding allocation model with stakeholders.

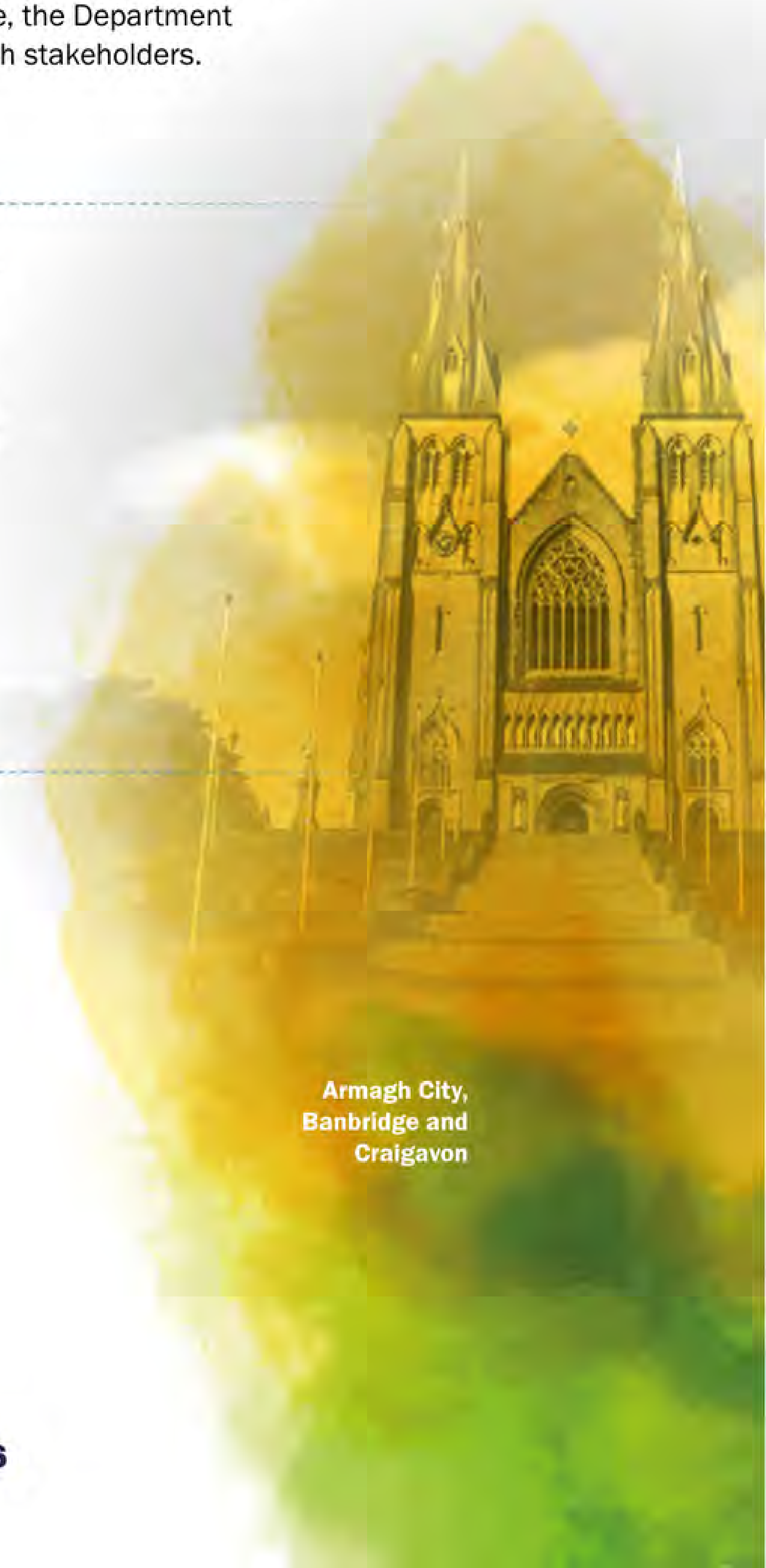
Jan 25 – Mar 25

Local Economic Partnerships will be responsible for bringing forward projects that align with the Minister's key priorities; Productivity, Good Jobs, Reduce Carbon Emissions and Regional Balance. Invest NI will support the Local Economic Partnerships in the identification of suitable projects. Proposed projects should be agreed by the partnerships and brought to the Department by end March 2025, so that funding can begin to be drawn down from April 2025.

Apr 25 – Mar 28

Department and Invest NI to review and approve proposed projects. Approved projects will be funded for delivery through dedicated funding.

The Department understands these are ambitious timelines, however, by working together in partnership, we can deliver tangible change at a local level.



Armagh City, Banbridge and Craigavon

Antrim and Newtownabbey

Further Details

You can download a copy of this plan and supporting evidence from www.economy-ni.gov.uk/regional-balance

You can find more information on the Invest NI Regional Office Network at www.investni.com/about-us/where-we-are

If you would like to speak to a member of the team about the Sub-Regional Economic Plan, you can contact the Regional Balance Unit at RegionalBalance@economy-ni.gov.uk

Invest Northern Ireland

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Sub-Regional Economic Plan

TECHNICAL ANNEX

CONTENTS

About this document
This document provides more detail on the approach being taken and evidence used in the creation of the Sub-Regional Economic Plan

1. INTRODUCTION AND OVERVIEW

Timeline analysis and evidence from previous economic policies show there are ongoing economic disparities and inequalities across the North. This evidence highlights that some regions have prospered more so than others.

The Economic Vision sets out four Economic Priorities:

- Raise Productivity
- Good Jobs
- Regional Balance
- Decarbonisation

The Sub-Regional Economic Plan has been created as a framework in realising Regional Balance under DfE's remit. This Technical Annex details the process of collecting the evidence used to inform and shape the Sub-Regional Economic Plan.

1.1 Evidence Overview of the Northern Ireland Economic Landscape

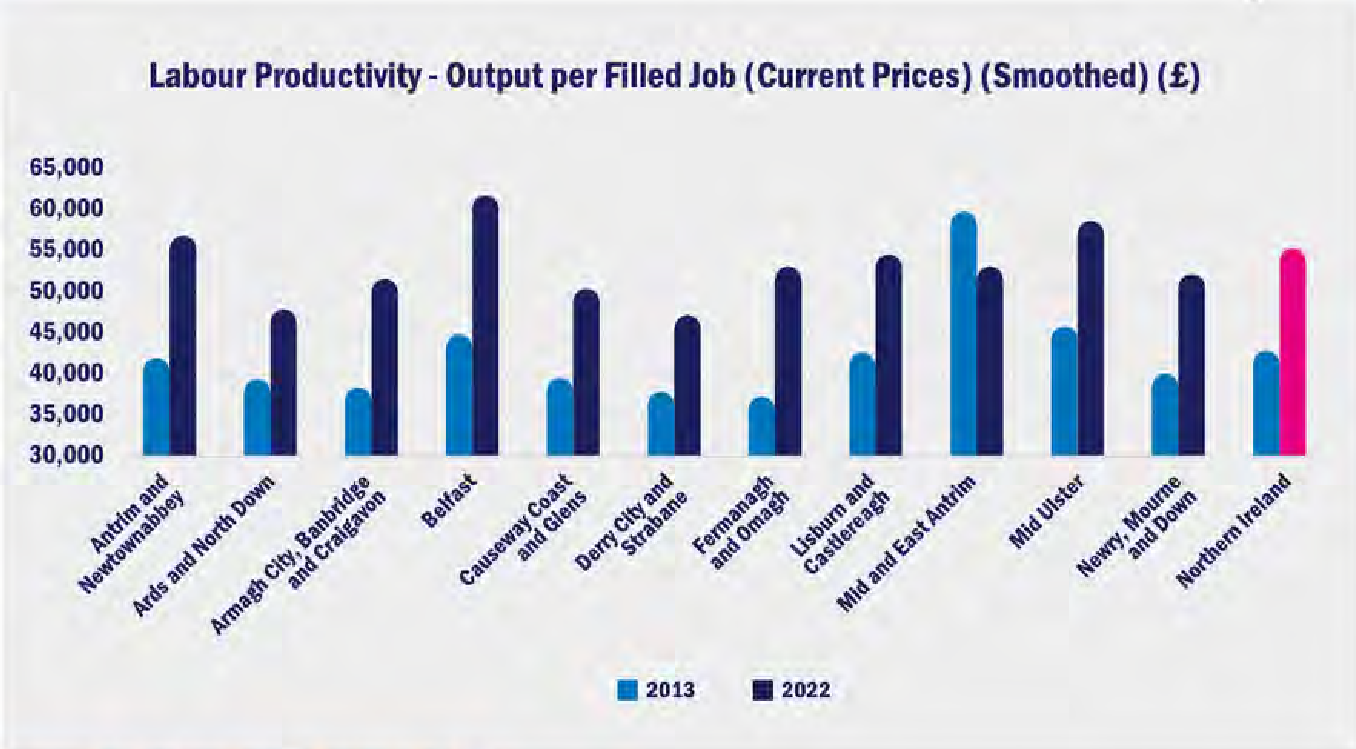
To further explore the extent of the disparities evidenced at a local level, a series of economic indicators were selected to create a comparable dataset, to show a holistic snapshot of the Northern Ireland economic landscape. The rationale for the selection is detailed further in Section 2. They have been aligned to the priorities from the Economic Vision and an analysis completed to show the highest and lowest performing regions against the NI average.

Priority One - Raise Productivity

The following indicators were selected to show a snapshot around this priority.

Raise Productivity - Comparison between Highest and Lowest Performing Regions

Labour Productivity (Output per filled job, 2022) (Headline) Highest Performing: Belfast £61,868 Lowest Performing: Derry City & Strabane £47,229 NI Average: £55,364 Output in the Highest Performing region was £14,639 higher (31%) than the Lowest Performing	**Business Birth Rate (of active businesses, 2022)** Highest Performing: Belfast 9.2% Lowest Performing: Mid Ulster 6.8% NI Average: 8.3% Gap is 2.4pp between Highest Performing council and Lowest Performing. Mid Ulster is 1.5pp below the NI average and Belfast is 0.9pp above the NI average
BERD Intensity (Business Expenditure R&D as % of output, 2022) Highest Performing: Armagh City, Banbridge & Craigavon and Belfast 2.1% Lowest Performing: Ards & North Down and Mid & East Antrim 0.5% NI Average: 1.5% Gap is 1.6pp between Highest and Lowest Performing regions. Both Belfast and Armagh, Banbridge & Craigavon as Highest Performers are 0.6pp above the NI average. Both Mid & East Antrim and Ards & North Down are 1pp below the NI average	**Total Early - Stage Entrepreneurship Activity Rates (2021-23)** Highest Performing: Ards & North Down 13% Lowest Performing: Causeway Coast & Glens 5.6% NI Average: 9.2% Gap of 7.6pp between the Highest Performing region and the Lowest Performing. Ards & North Down is 3.8pp above the NI average while Causeway Coast & Glens is 3.6pp below the NI average
FDI - New Jobs (% total, 2015-22) The largest percentage of new jobs from FDI has been created in Belfast (78%). Derry City & Strabane ranks better than the rest of the regions at 10.7%, but all remaining areas have historically gained little in terms of new jobs through FDI	**Export Intensity (exports as % of all sales, 2022)** Highest Performing: Newry, Mourne & Down 24% Lowest Performing: Antrim & Newtownabbey and Ards & North Down 13% NI Average:17% Gap of 11pp between the Highest Performing region and the Lowest. Newry, Mourne & Down is 7pp above the NI average while both Ards & North Down and Antrim & Newtownabbey are 4pp below the NI average



Source: Sub-Regional Labour Productivity, ONS

Average output per filled job increased from £42,936 in 2013 to £55,364 in 2022. As of 2022 only three LGDs exceed NI average productivity – Belfast, Mid Ulster, and Antrim and Newtownabbey.

All areas have seen a nominal increase in productivity over the ten years to 2022 with the exception of Mid & East Antrim. Output per job in this area declined by 9.4% over the 10-year period. Fermanagh and Omagh saw the largest increase (46.1%) followed by Antrim and Newtownabbey (36.6%).

Belfast and Mid Ulster have consistently been above the NI Average and are the only Local Government Districts (LGDs) where productivity is comparable to the UK average. The position of most other LGDs relative to the NI average has remained broadly unchanged with the exception of Mid and East Antrim where productivity was significantly higher than average prior to 2017 and is now notably lower.

Priority Two – Good Jobs

The following indicators were selected to show a snapshot remove around this priority.

Good Jobs - Comparison between Highest and Lowest Performing Regions

Median Wages (Gross Weekly pay by place of Work, 2023) (Headline) Highest Performing: Belfast £596.80 Lowest Performing: Ards & North Down £450.10 NI Average: £528.90 The Highest Performing region earned on average £146.70 more per week than the lowest performing. Belfast earned on average £67.90 more than the NI average. Ards & North Down earned £78.80 less than the NI average per week	**Employees earning above the Real Living Wage (working age population 18+, 2020-22)** Highest Performing: Lisburn & Castlereagh 88.5% Lowest Performing: Derry City & Strabane 79.7% NI Average: 85.5% Gap of 8.8pp between the Highest Performing region and the Lowest Performing region. Proportion of employees earning above the Real Living Wage in Lisburn & Castlereagh was 3pps higher than the NI average. The Real Living Wage earning rate was 5.8pps lower than average in Derry City and Strabane.
Employees in Secure Employment (2021-22) Highest Performing: Mid & East Antrim 98.2% Lowest Performing: Causeway Coast & Glens 93.2% NI Average: 95.6% Gap of 5pps between the Highest Performing region and the Lowest Performing, although employees reporting secure employment is relatively high across all LGDs. The Secure Employment rate was 2.6pps higher than the NI average in Mid & East Antrim. In Causeway Coast & Glens the rate was 2.4pps lower than the regional average.	

Source: Annual Survey of Hours and Earnings, NISRA

Gross Weekly Median Pay for all NI employees stood at £528.90 in 2023 compared to £428.60 in 2019. On an LGD of work basis, only two regions exceed the median for all employees in 2023 – Belfast (£596.80) and Antrim & Newtownabbey (£529.70). The region with the lowest Gross Median Weekly Pay was Ards & North Down (£450.10).

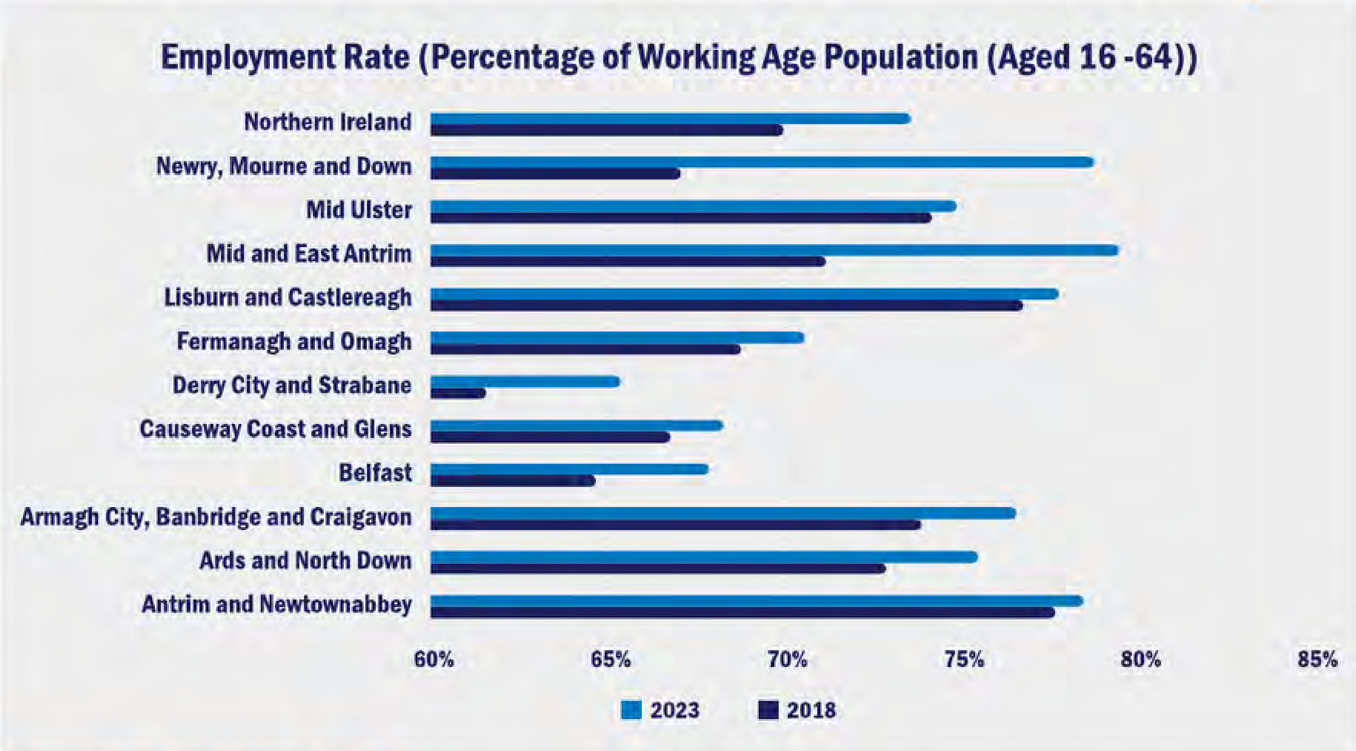
From 2019 to 2023, median pay growth was largest in Ards & North Down (29.5%) and Derry City Strabane (29.3%), albeit from low baseline earnings levels. The rate growth over this period was comparable in Belfast (25.2%) although its median pay in 2019 was significantly higher than any other LGD. Antrim and Newtownabbey recorded the lowest growth in median pay in the five years to 2023 (17.0%).

Priority Three – Regional Balance

The following indicators were selected to show a snapshot around this priority

[1]**Employment Rate (people 16 – 64 in work, 2023)** Highest Performing: Mid & East Antrim 79.5% Lowest Performing: Derry City & Strabane 65.4% NI Average: 73.6% Gap of 14.1pps between the Highest Performing region and the Lowest Performing. Employment Rate in Mid & East Antrim is 5.9pps higher than the NI average. However, in Derry City & Strabane, the rate is 8.2pps lower than the NI average.	**Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)** Highest Performing: Mid & East Antrim 19.3% Lowest Performing: Derry City & Strabane 32.7% NI Average: 24.7% Gap of 13.4pps between the Highest Performing region and the Lowest Performing. The inactivity rate in Mid & East Antrim was 5.4pps lower than the NI average. The rate in Derry City & Strabane was 8pps higher than the NI average.
Gross Disposable Household Income (GDHI) (per head, 2021) Highest Performing: Lisburn & Castlereagh £19,223 Lowest Performing: Derry City & Strabane £16,572 NI Average: £17,636 GDHI per head in Lisburn & Castlereagh was £2,651 more than in Derry City and Strabane as of 2021GDHI per head in Lisburn & Castlereagh is also £1,587 higher than the regional average. In Derry City & Strabane it was £1,064 lower than the NI average.	**Tertiary Educational Attainment Rate Level 4+ (working age population 16 – 64, 2023)** Highest Performing: Lisburn & Castlereagh 50.1% Lowest Performing: Mid & East Antrim 34.2% NI Average: 39.7% Gap of 15.9pp between the Highest Performing region and the Lowest Performing. Lisburn & Castlereagh's rate was 10.4pp higher than the NI average. Mid & East Antrim's rate was 5.5pp lower than the NI average.

1 Employment Rate - the measure used differs from the measure presented in the Sub-Regional Economic plan as up to date estimates are not available at time of publication



Source: Labour Force Survey, NISRA

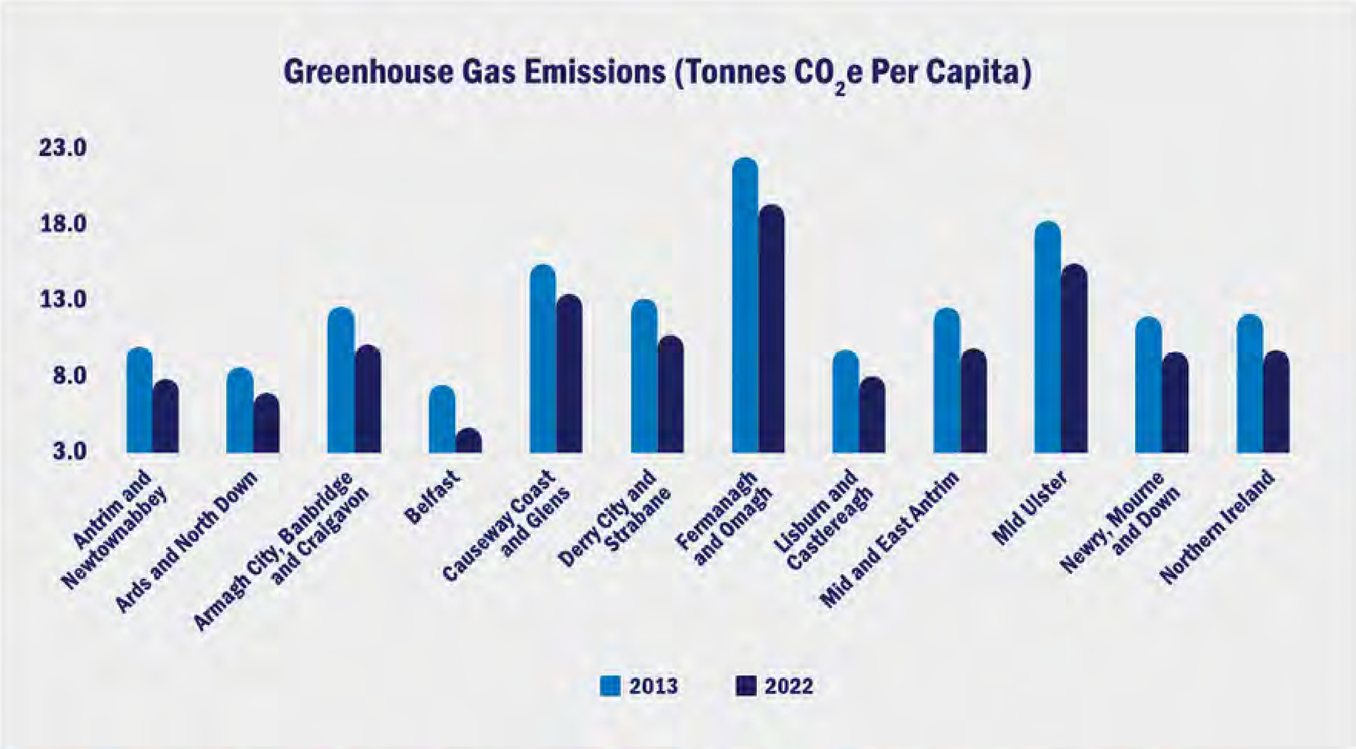
In 2023, 7 out of 11 LGDs exceeded the regional average employment rate (73.6%) with Mid & East Antrim ranked the highest with 79.5%. Derry City & Strabane had the lowest rate at 64.4%.

Over a five-year period, most regions experienced a modest increase in employment with the exception of Derry City & Strabane (-2.6%), Mid Ulster (-0.4%) and Lisburn & Castlereagh (-3.3%).

Priority Four – Decarbonisation

The following indicators were selected to show a snapshot around this priority.

Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)(Headline)	**Renewable Electricity Generation (MW/h per household, 2022)**
Highest Performing: Belfast 4.7	Highest Performing: Fermanagh & Omagh 24.4
Lowest Performing: Fermanagh & Omagh 19.4	Lowest Performing: Belfast 0.1
NI Average: 9.8	NI Average: 5.6
Proportional Greenhouse Gas emissions are highest in Fermanagh and Omagh and lowest in Belfast. Emissions recorded for Belfast were 5.1 tonnes less than the NI average 9.6 tonnes more than the regional average in Fermanagh and Omagh.	Gap of 24.3 MW/h per household between the Highest Performing region and the Lowest Performing. Fermanagh & Omagh generated 18.8 MW/h per household more than the NI average. Belfast generated 5.5 MW/h per household less than the NI average.



Source: UK Local Authority and Regional Greenhouse Gas Emissions Statistics, Dept of Energy Security and Net Zero

All regions have seen a decrease in total Greenhouse Gas Emissions between 2013 and 2022.

2. EVIDENCE BASE

This Technical Annex details the process taken to collect the evidence used to inform and shape the Sub-Regional Economic Plan.

Several objectives were set for this process:

Objective 1 – to use an evidence informed approach to establish a local level, economic comparative picture to inform the Sub-Regional Economic Plan.
Objective 2 – to use evidence to create economic council profiles against selected criteria to build a comparative base.

Information from a wide range of sources was considered in deciding the approach taken, and as such is not based on the findings of one dataset. Evidence was gathered through several methods and examined to corroborate findings from other datasets. This process is detailed below.

Process of Evidence Gathering

Benchmarking	Approaches taken by other regions and countries including Ireland, Scotland, Wales and other areas of the UK
Statistical Data	Data produced through robust and comprehensive methodology from official government sources
Citizen's Voice	Views and information gathered through dedicated engagement with local stakeholders Analysis and information from the PLACE10X Call for Evidence
Policy Insights	Findings from recent policy initiatives
NI Partner Strategies	Using existing knowledge and work created by partners at a local area level, including Labour Market Partnerships and Community Planning strategies

The result of this was the creation of an evidence informed snapshot of the economic landscape at a local level.

It is not intended to be an in-depth analysis but rather a snapshot in time to provide a comparative picture.

Information from a wide range of sources was gathered through several methods. A comparative base was created by ensuring the same type of evidence was used. Criteria for the selection of this evidence is as follows:

- Information available at a NI LGD level
- Statistical data available over a span of several years
- Statistical data that provides evidence for priorities set out in the Economic Vision

While this evidence is focused on Regional Balance, it cannot be seen in isolation from the other priorities, as each inter-link to the success or otherwise of the others.

It is important that over-interpretation of the evidence is avoided as evidence has been selected to form a snapshot. Limitations of the data are discussed at the end of this annex.

3. COUNCIL ECONOMIC PROFILES

The Council economic profiles below have been created using statistical evidence and other complimentary information. This includes a range of official government statistical data, council published strategies, information from local plans as well as data collected through dedicated engagement with councils and other stakeholders.

They have been designed to provide a localised evidence base which gives a **snapshot of comparative economic performance across council areas**. Much analysis and profiling had already been completed at a council level by various organisations. The analysis provided in this annex is not intended to supersede or duplicate, but is an attempt by DfE to pull together information from various sources to create a comparative economic profile and provide a rationale to the approach in the economic plan.

To do this, a structured approach to the profiles was created with key headings. A range of locally comparable metrics were selected to provide a holistic economic overview of each council area which could be aligned to the Minister's economic priorities.

These are not future metrics that will measure progress and success but a snapshot of the past to inform future approach.

Structure of the Council Economic Profiles

HEADING	RATIONALE	INFORMATION/ METRIC
1. Demographics	To show the existing and future labour market in terms of potential skills pipeline	Total population (% of NI) Working age pop. Employment rate
2. Economic Performance	To summarise economic performance against selected indicators and priorities	Headline economic indicators Performance against Economic Vision headline metrics and additional metrics
3. Business Base	To show the structure of the business base in each area	Total no. of businesses (% of NI) Breakdown in size (micro, small, medium, large) Business births, survival rates (1 year)
4. Key Sectors	To show the main industry groups and clusters in a council area	Council identified key sectors Biggest and smallest sectors by broad industry groups
5. Assets	To show the infrastructure/geographic assets in a council area	Shown by theme
6. Employment	To show employment by broad industry breakdown	Total jobs (% of NI) - public/private sector breakdown Breakdown by broad industry group
7. Invest NI activity	To show the level of investment activity by Invest NI Supported companies	Top 5 Invest NI supported investors
8. City & Growth Deals projects	To show approved City & Growth Deals projects*	Capital infrastructure through the City & Growth Deals Projects from other Departments
9. Economic Strategy & Partnerships	To show economic analysis created with a local focus	Key findings from Council strategies Labour Market Partnership Action Plans Community Planning Partnerships

The performance information has provided clear directional evidence to support the policy approach being taken. Benchmarking at a council level highlights the areas that have opportunities for growth or change.

*At time of publication both Causeway Coast & Glens and Mid South West Growth deals are paused as part of the UK Autumn Spending Review considerations and it is hoped that funding will be reaffirmed shortly.

Sources used are detailed in Appendix B.

3.1 Antrim & Newtownabbey Borough Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 146,100 (7.6% of total NI population)[2]
- Working age population (16-64) - 91,200 (62.4% of Antrim & Newtownabbey Total population)
- Employment rate – 78.5%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	3	£56,956	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	3	2.0%	1.5%
Business Birth Rate (of active businesses, 2022)	8	8.1%	8.3%
FDI - New Jobs (% total, 2015-22)	4	4.1%	-
Export Intensity (exports as % of all sales, 2022)	10=	13%	17%
Total Early-Stage Entrepreneurial Activity Rate (2021-23)	8	6.9%	9.2%

2 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (Gross Weekly pay by place of work, 2023)	2	£529.70	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	2	88.0%	85.5%
Employees in Secure Employment (2021-22)	9	94.2%	95.6%

Regional Balance

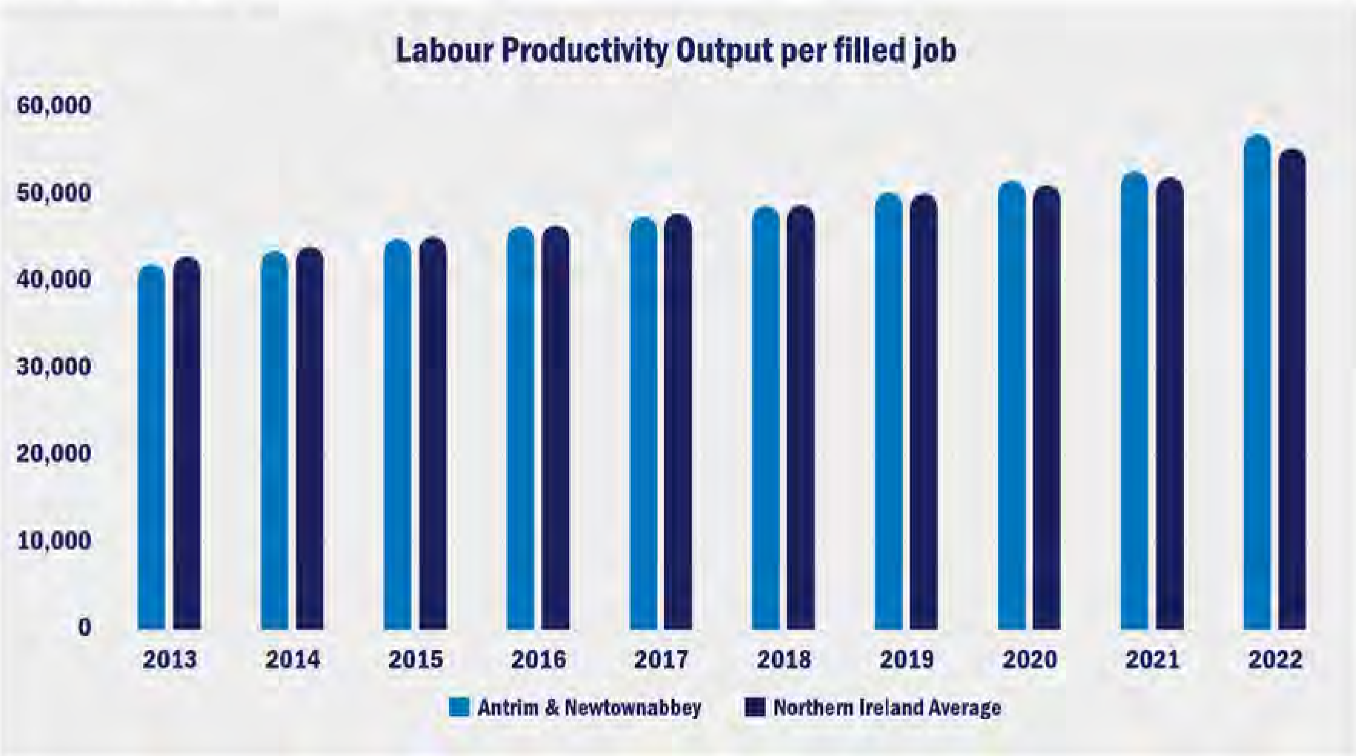
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	3	78.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	3	19.8%	24.7%
Gross Domestic Household Income (per head, 2021)	3	£17,960	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	2	45.6%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	3	7.9	9.8
Renewable Electricity Generation (MW/h per household, 2022)	7	2.3	5.6

Performance against Economic Vision core metrics

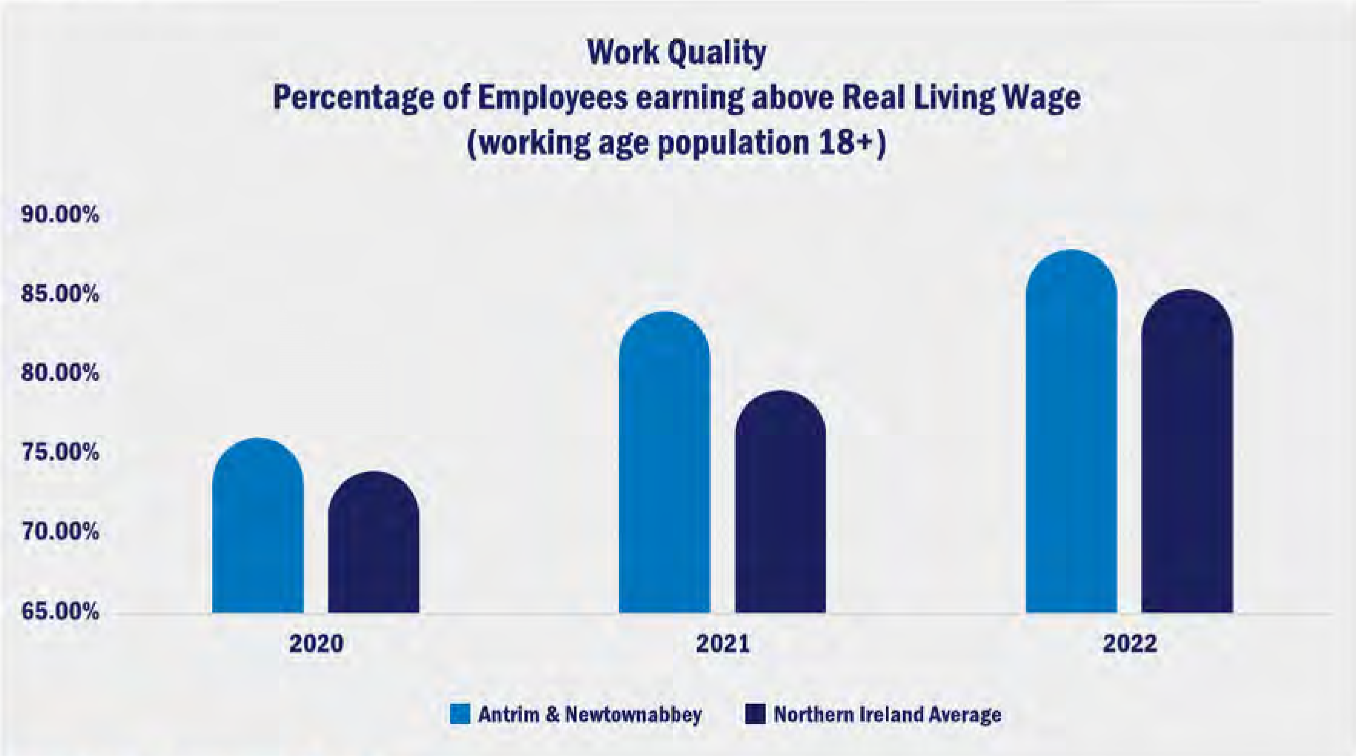
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Build on Labour Productivity** – As of 2022, output per filled job in Antrim and Newtownabbey was the third highest in NI at £56,956. This is underpinned by high rates of tertiary education attainment and business R&D activity in the area. However, labour productivity remains significantly below the best performing regions in NI (Belfast and Mid Ulster) so there remains scope for improvement.
- **Improve Export Intensity** – In comparison to its performance on other contributing factors to productivity, export intensity in Antrim and Newtownabbey is below average. In 2022, the value of exports as a proportion of regional output was 20.3% compared to 21.8% for NI as a whole. Building international demand for products, increasing exposure to international competition and supporting firms to export could have outsized implications for productivity growth in the area.
- **Build on BERD Intensity** – Antrim and Newtownabbey has the third highest rate of BERD intensity in NI (R&D spending by businesses as a proportion of output) at 2.0%. The improvement in business R&D expenditure is relatively recent and there may be scope to support R&D activity within the area further.
- **Improve Total Early-Stage Entrepreneurship Activity (TEA) Rate** – Antrim and Newtownabbey's rate of early-stage entrepreneurial activity is significantly below the NI average (6.9% compared to 9.2%). Supporting the growth of new and innovative firms will be important in affecting further positive change in overall productivity.
- **Increase FDI** – There is clear potential to increase the area's share of new FDI jobs which will improve a number of economic indicators in the LGD.

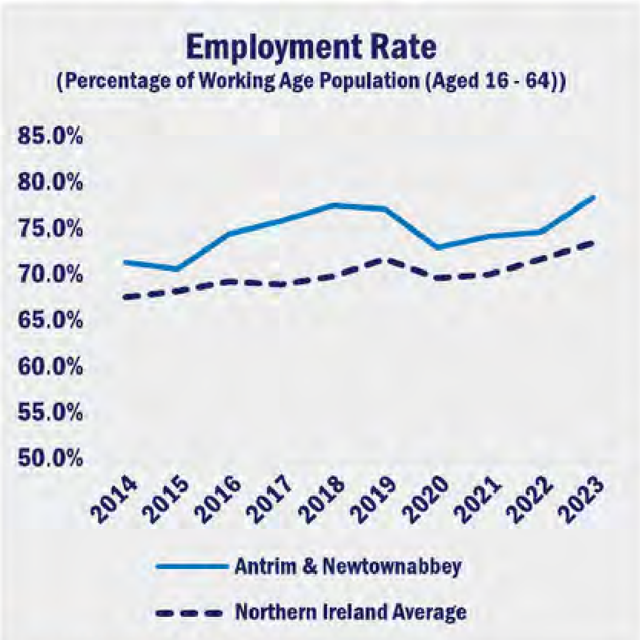
Good Jobs



Source: Labour Force Survey, NISRA

- **Build on Real Living Wage and Median Wages** – the area has the second highest proportion of employees earning above the Real Living Wage (88.0% compared to NI average of 85.5%) and third highest Median Wages (£529.70 compared to a regional average of £528.90). Improving productivity growth within the area would be expected to positively impact wages further.

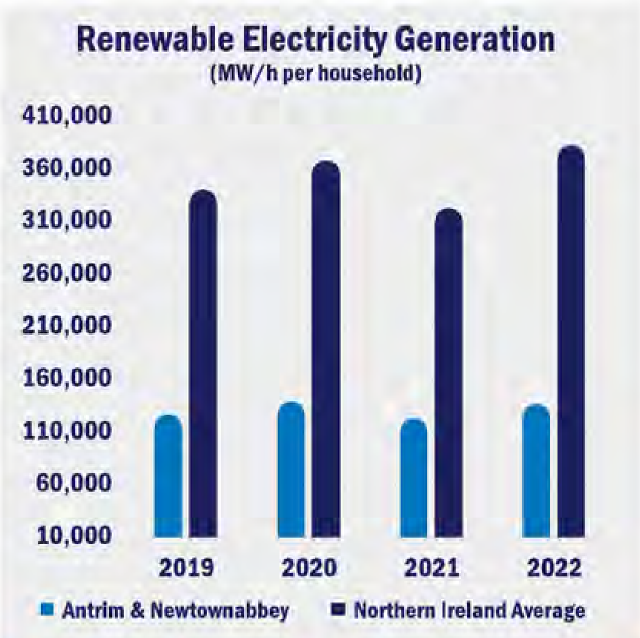
Regional Balance

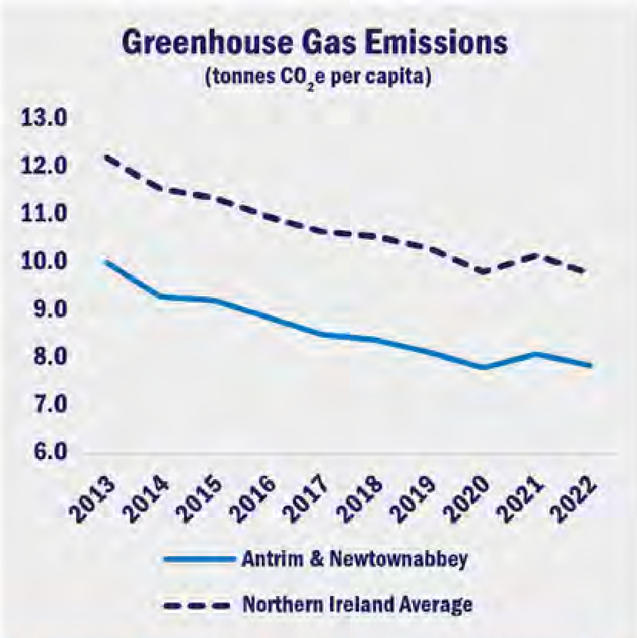


Source: Labour Force Survey, NISRA

- **Build on Tertiary Educational Attainment Level 4+ Rate** – the area's Labour Productivity is underpinned by a high rate of tertiary qualification attainment. In 2023, the proportion of those aged 16 to 64 with RQF Level 4 qualifications and higher was 45.6%, the second highest in NI (NI average of 39.7%). Further improvements in tertiary education attainment would be expected to support already high employment in the area by ensuring that workers have the requisite skills demanded by employers. Increased supply of skills will also support productivity by ensuring that firms have the necessary skilled labour needed to grow.

Decarbonisation





Source: Regional Greenhouse Gas Emissions Statistics and Renewable Electricity Statistics by Local Authority, Department of Energy Security and Net Zero (DSENZ)

- **Increase Renewable Electricity Generation** – ANBC had the fifth lowest level of Renewable Electricity Generation with 2.3 MW/h per household. There has been little change since 2019. The highest level was 24.4 MW/h per household in Fermanagh and Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wages (Skill Level 4 Employees)	1	£24.78	£23.41
Household Income Inequality	2	0.29	0.30
Gender Pay Gap	8	7.6%	8.3%

Source: Annual Survey of Hours and Earnings, NISRA/Family Resources Survey, Dept for Communities

- Reflecting higher than average productivity and tertiary qualification rates, Antrim and Newtownabbey has the highest median wage (by LGD of work) for highly skilled employees. In 2023 the median wage for these employees was £24.78 per hour, 5.9% higher than for NI as a whole.

- Household income inequality in Antrim and Newtownabbey is also slightly lower than NI as a whole. Over the period 2018/19 to 2021/22, the GINI coefficient (after housing costs) for the area was 0.29 compared to an NI average of 0.30.
- The median gender pay gap in Antrim and Newtownabbey is slightly lower than the NI average but is notably higher than some adjacent areas. In 2023, the difference between the median wage for men and that for women was 7.6%, compared to 8.3% for NI as a whole.

3. Business Base

Provides an overview of the size and makeup of the business base

- Total businesses (2019) – 4,175 – 6% of all businesses in NI[1]

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 86%
- Small business (10-49 employees) 11%
- Medium business (50-249 employees) 3%
- Large Business (250+ employees) 1%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	8.1%	8.3%	Above 0.2%
Business Survival Rates – 1 year	89%	88%	Above 1%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

- Life & Health Sciences
- Advanced Engineering & Manufacturing
- Construction
- Transportation & Distribution

Strategic Focus	Sector	Why
Focus & Step Change	Advanced Manufacturing, Materials & Engineering	Manufacturing a major employer Sector in transition
	Transport & Logistics	Has the highest concentration of employment in NI for this industry
	Life & Health Sciences	Concentration of Anchor Institutions
Sustain & Grow	Professional Services	Seen as a potential growth sector
	Tourism	Growth sector
	Digital & ICT	Strategic sector

Source: Antrim & Newtownabbey Council Economic Strategy 2016-2023

Biggest sectors by number of companies (Broad Industry Groups)[3]

- Agriculture, Forestry & Fishing
- Construction
- Professional, Scientific & Technical
- Production
- Arts, Entertainment, Recreation & Other

Smallest sectors by number of companies (Broad Industry Groups)

- Public Admin & Defence
- Education
- Finance & Insurance
- Info & Communication
- Health

5. Assets

Provides an insight into some of the key strengths within the area

Transport • Belfast International Airport • M2 transport corridor • Proximity to key transport: 1. Larne Harbour 17 miles from Newtownabbey via A8 2. Belfast Harbour 7 miles via M2 3. Belfast City Airport 10 miles via M2	**Education** • University – UU Jordanstown Campus (Sports Village) • Further Education: Northern Regional College Newtownabbey campus provides courses across 3 academic departments – Business & Service Industries, Health, Social Care and Access, and Advanced Technologies. Entrepreneurship Curriculum Hub • CAFRE Greenmount Campus (Antrim) – Agriculture, Horticulture, Environmental
Tourism • Antrim Castle Gardens and Clotworthy House • Shanes Castle • Lough Neagh • Belfast Lough	**Retail** • Large retail and leisure clusters in Antrim (The Junction) and Newtownabbey (Abbey Centre)
Energy • Geothermal opportunity – CAFRE, Antrim	

3 Inter-departmental Business Register (IDBR), NISRA

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
59,129	8%	3=	13,330 (23%)	45,799 (77%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	11,457	19.3%	16.9%	Higher 2.4%
Wholesale and Retail	11,351	19.1%	16.1%	Higher 3.1%
Manufacturing	7,330	12.4%	11.1%	Higher 1.3%
Transport and Storage	5,785	9.8%	3.8%	Higher 5.9%
Education	5,397	9.1%	9.9%	Lower 0.8%
Administrative and Support Service activities	4,177	7.0%	6.7%	Higher 0.3%
Accommodation and Food Service	3,021	5.1%	6.6%	Lower 1.5%
Construction	2,860	4.8%	4.8%	Equal
Public Administration and Defence; Compulsory Social Security	1,535	2.6%	6.4%	Lower 3.9%
Professional Scientific and Technical	1,531	2.6%	5.2%	Lower 2.6%
Information and Communication	1,297	2.2%	3.3%	Lower 1.1%
Water Supply, Sewerage and Waste Management / Remediation	1,130	1.9%	1.0%	Higher 0.9%
Other Services Activities	780	1.3%	1.8%	Lower 0.5%
Arts, Entertainment and Leisure	737	1.2%	2.0%	Lower 0.7%
Financial Services and Insurance	427	0.7%	2.4%	Lower 1.7%
Real Estate	377	0.6%	1.3%	Lower 0.6%
Agriculture, Forestry and Fishing	104	0.2%	0.1%	Higher 0.1%
Mining and Quarrying	0	0.0%	0.2%	Lower 0.2%
Electricity, Gas, Steam and Air Conditioning Supply	0	0.0%	0.3%	Lower 0.3%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Human Health and Social Work Activities

According to analysis from the Council Economic Strategy, the following sectors have the potential for growth or decline by 2030:

- Anchor Sectors: Transport & Logistics, Life & Health Sciences
- Growth: Construction, Retail, Accommodation, Arts & Recreation
- Decline: Agriculture, Manufacturing, Mining & Quarrying

- Opportunity: Digital & ICT, Tourism

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[4]

Provides an insight into investment activity by Invest NI supported companies

- Schrader Electronics Ltd (United States)
- CDE Manufacturing Ltd (Northern Ireland)
- Interfrigo Ltd (Northern Ireland)
- Tribe Tech (Australia)
- Dunadry Hotel (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

8. City and Growth Deal Projects

Details capital projects through City and Growth Deals, and other government projects

- **Advanced Manufacturing Innovation Centre (AMIC), £98m** – Global Point, Newtownabbey - the springboard for manufacturing innovation in NI; a specialised environment for advanced manufacturing and engineering sectors to access the very latest manufacturing technology and Industry 4.0 smart automation, supported by experienced, professional engineers and a state-of-the-art Factory of the Future.

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 council regions in the Belfast Region City Deal.

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Economic Strategy 2016 – 2023 headlines

Five Areas of focus:

- Entrepreneurship and business support
  - Increase number of business start-ups
  - Increase SME base
  - Improved business survival rates
  - Increased scale up rates
- International Business
  - Additional export revenues
  - Additional FDI
  - Re-investment by existing international firms

4 Council Economic Profiles, Invest NI, March 2024

- Learnings from International partners
- Skills and employability
  - Reduction in skills mismatches
  - Reduced economic inactivity
  - Improved labour supply
  - Improved real understanding of skills needs
- Local wealth building
  - Indigenous business success
  - Investment by local firms in local economy
- Infrastructure
  - Business growth enabled through available premises
  - Employment stimulated
  - Improved intra Borough access

Specific measures of success will include:

- Improve Entrepreneurship levels (as measured by the Global Entrepreneurship monitor) to NI levels or better
- Improve the proportion of working age population with no formal qualifications to at least NI average
- Support an increase in employment of 5,000 jobs above current levels by 2030

Labour Market Partnership targets

By 2025 we will:

- Reduce the percentage of claimants aged 18 – 24
- Reduce the working age economic inactivity rate in the Borough to 20%
- Reduce the number of residents who are unemployed, yet actively seeking work to 2%
- Continue the current trend of reducing the level of those without any qualifications, whilst promoting and continuing the upward trend for those with above NVQ Level 4 educational attainment and increasing the Boroughs median pay
- Raise awareness of the work of the Labour Market Partnership and the regional programmes and initiatives/opportunities open to our residents

Community Planning Partnership targets 2017-2030

Majority of targets have already been achieved or are in progress:

- Clean and Vibrant places action plans for each DEA and town in the borough within 2 years.
- An integrated support structure for business and enterprise (including social) within 2-5 years
- Establish an Employability and Skills/Economic Think Tank Forum - within 2 years
- Enterprise programmes (Business School Linkages) - within 2 years
- Employer Supported Volunteering Scheme - within 2-5 years

3.2 Ards & North Down Borough Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 164,200 (8.6% of total NI population)[5]
- Working age population (16-64) – 97,400 (59.3% of Ards & North Down Total population)
- Employment rate – 75.5%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	10	£47,957	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	10=	0.5%	1.5%
Business Birth Rate (of active businesses, 2022)	4	8.6%	8.3%
FDI - New Jobs (% total, 2015-22)	7	0.4%	-
Export Intensity (exports as % of all sales, 2022)	10=	13%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	1	13.0%	9.2%

5 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	11	£450.10	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	9	82.8%	85.5%
Employees in Secure Employment (2021-22)	6	95.3%	95.6%

Regional Balance

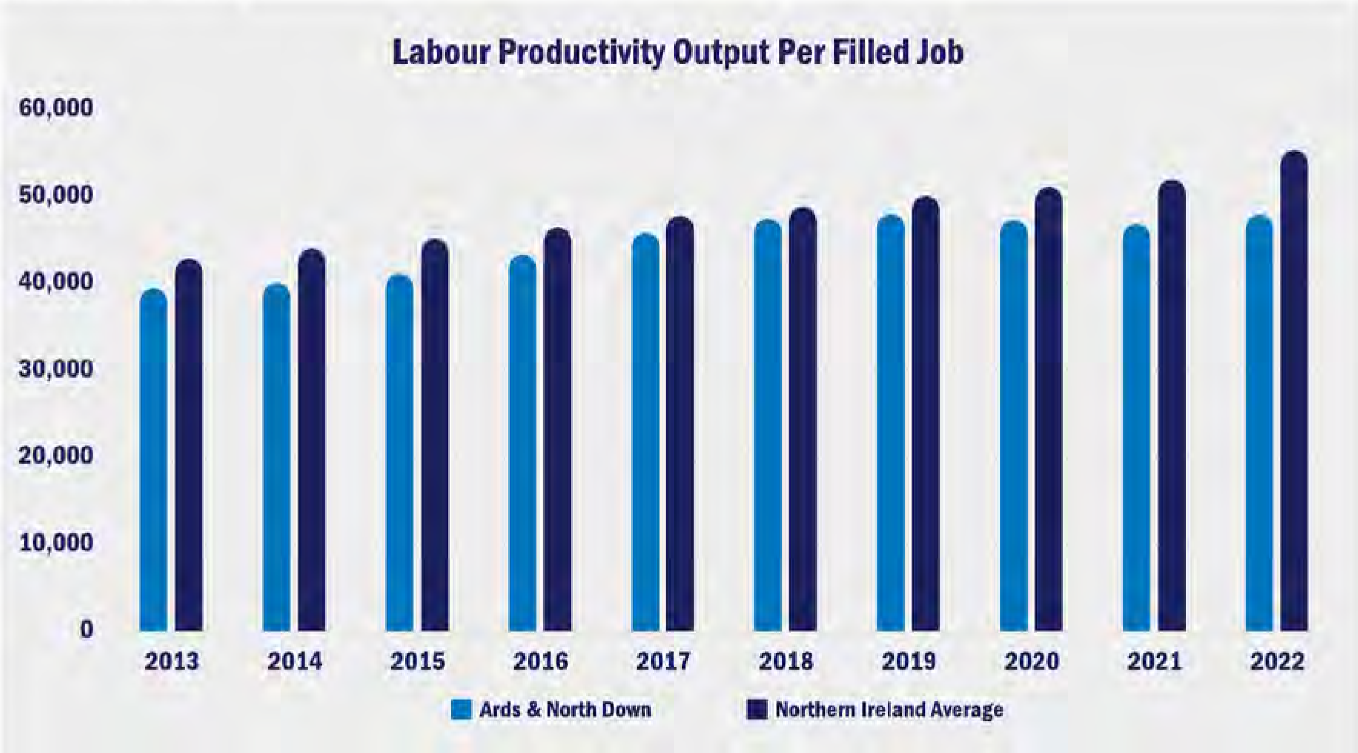
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	6	75.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	7	23.6%	24.7%
Gross Domestic Household Income (per head, 2021)	2	£19,108	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	3	44.8%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	2	7.0	9.8
Renewable Electricity Generation (MW/h per household, 2022)	9	0.6	5.6

Performance against Economic Vision core metrics

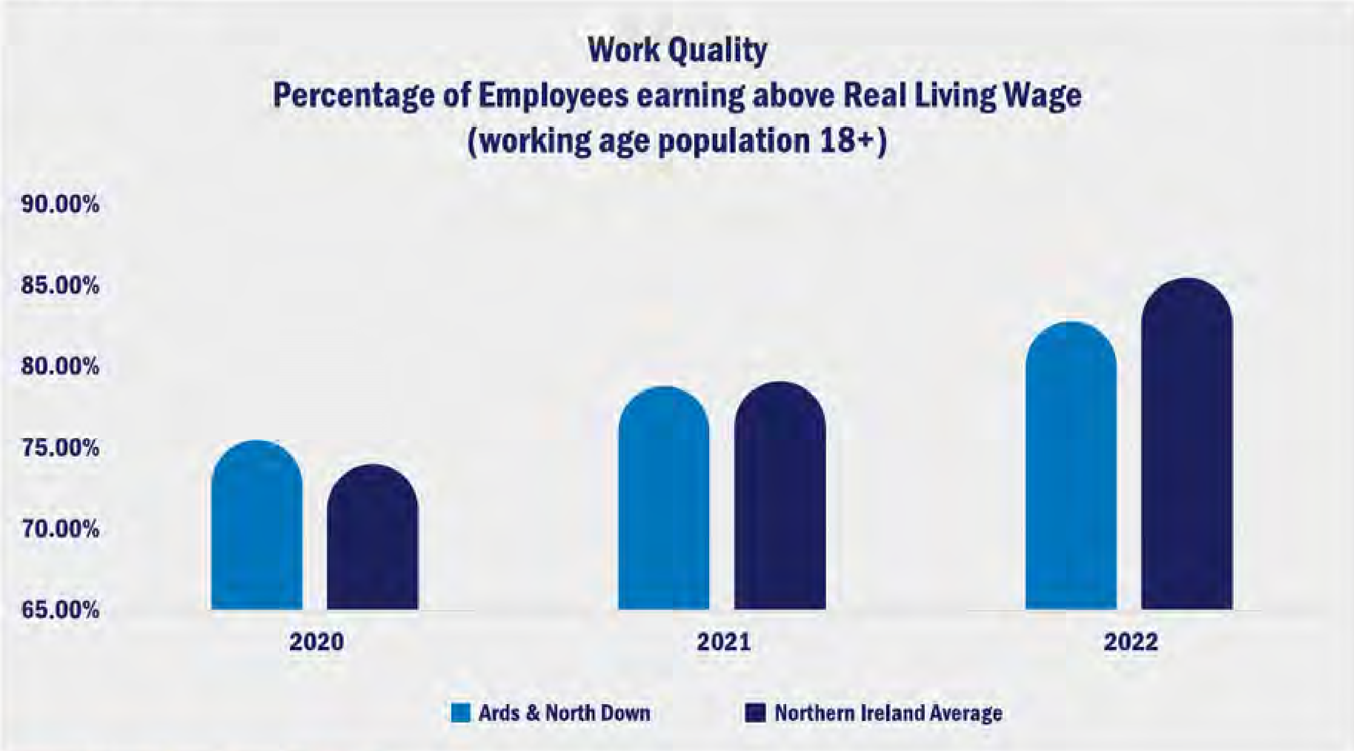
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase Labour Productivity** – average productivity in Ards and North Down is the second lowest in NI at £47,957 (NI average of £55,364, Belfast is the highest performing at £61,868). Low productivity persists despite strong performance on educational qualification indicators which may reflect a large proportion of the working population in the area commuting to Belfast for work. This is supported by the fact that the area has one of the largest differences in median weekly wages between those who reside in the area compared to those who work there.
- **Increase Export Intensity** – in 2022, around 13% of total business sales in Ards & North Down were exports, the joint lowest proportion of any LGD. The NI average is 17% and the highest LGD, Newry, Mourne and Down, has almost double the rate at 24%.
- **Increase BERD Intensity** – Ards and North Down has the second lowest rate of BERD intensity in NI (R&D spending by businesses as a proportion of output) at 0.5% (NI average is 1.5%. Highest rate is Belfast at 2.1%).
- **Build on Total Early-Stage Entrepreneurship Activity Rate** – the area has the highest rate of early-stage entrepreneurial activity in 2021-2023, at 13% compared to the regional average of 9.2%.

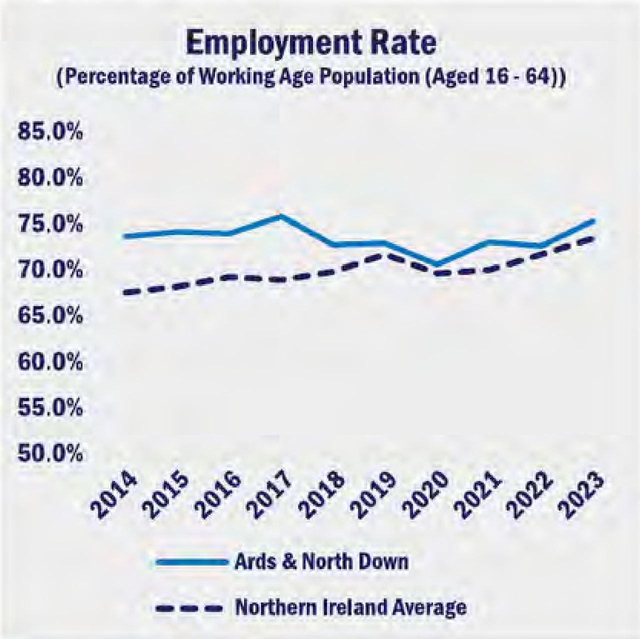
Good Jobs



Source: Labour Force Survey, NISRA

- **Increase Median Wages** – Gross weekly median wages in Ards and North Down (according to LGD of work) are the lowest in NI at £450.10 per week. The area has one of the largest differences in median weekly wages for those that live in the area compared to those that work in the LGD (around £49.90 in favour of those that reside in the area as of 2023). This likely reflects the status of the LGD as a major commuter area to Belfast.
- **Increase rate of Employees earning above the Real Living Wage** – In a similar vein, the proportion of employees (aged 18+) that earn above the Real Living Wage in Ards & North Down is the third lowest in the north at 82.8%. This proportion is also notably low in comparison to areas roughly adjacent to the LGD such as Lisburn & Castlereagh (88.5%), Newry, Mourne & Down (86.0%) and Belfast (85.2%).

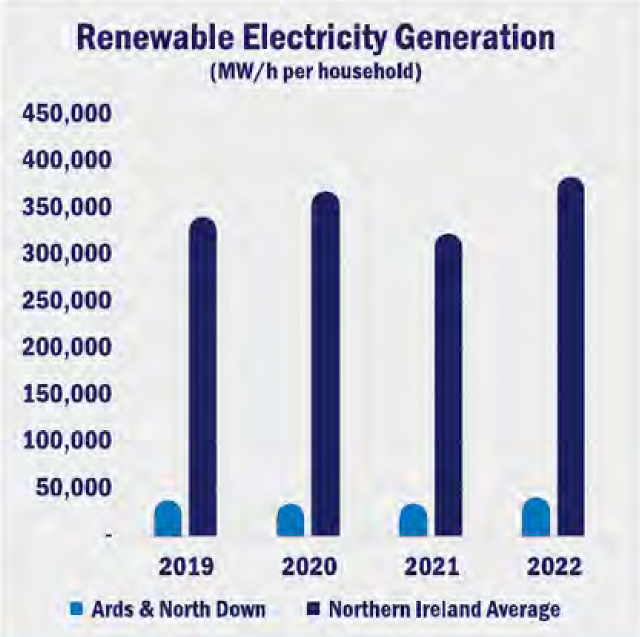
Regional Balance

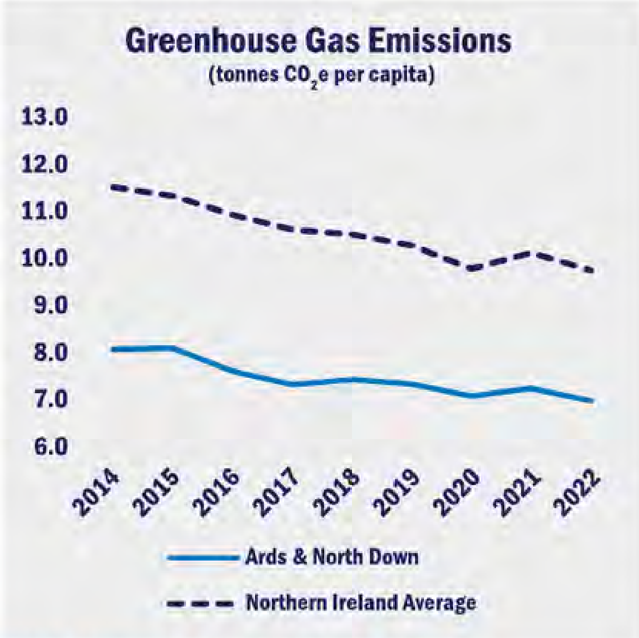


Source: Labour Force Survey, NISRA

- **Build on Tertiary Educational Attainment Level 4+ rate** –in 2023, Ards & North Down had the third highest rate of working age tertiary qualification attainment amongst the NI LGDs at 44.8% (NI average is 39.7%).
- **Reduce Economic Inactivity** – Although the economic inactivity rate in the area is below the NI average (23.6% v.s. 24.7%) it is higher in comparison to other LGDs with similarly high rates of tertiary qualification attainment (e.g. Lisburn & Castlereagh at 21.7% and Newry, Mourne & Down at 19.5%).
- **Increase Employment** – In similar fashion, working age employment rates in the area (75.5%) are higher than the NI average (73.6%) but lower in comparison to roughly similar areas located around Belfast.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Increase Renewable Electricity Generation** – in 2022, Ards & North Down had the third lowest level of Renewable Electricity Generation with 0.6 MW/h per household. The highest level was 24.4 MW/h per household in Fermanagh & Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Proportion of working age population with no qualifications	2	8.5%	12.3%
Gender Employment Gap	9	9.2pps	6.9pps
GINI Coefficient	9	0.32	0.30

Source: Labour Force Survey, NISRA/Annual Survey of Hours & Earnings, NISRA/Family Resources Survey, DfC

- The area tends to perform well across most indicators of qualification attainment. As noted previously the tertiary attainment rate in the area is one of the highest in NI and the proportion of the working age population with no qualifications is the second lowest of any LGD (8.5% compared to 12.3% in 2023).
- Incidence of Lifelong Learning is also high in the area. In 2022, 16.4% of males (aged 25-64) and 18.6% of females were engaged in some form of education or training. The rate for males was the third highest amongst all LGDs and the female rate was the 4th highest.
- Ards & North Down has a relatively small gap between male and female employment rates as of 2023. In 2023 the gap amounted to 1.9pps compared to the NI average of 5.9pps. This is primarily due to better than average employment rates for women as male working age employment rates are roughly in line with the NI average.

- Household income inequality is slightly higher than is typical for NI. On average, over the period 2018/19 to 2020/21, the sub-regional GINI coefficient (after housing costs) for the area was 0.32 compared to an average of 0.30.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 4,815 – 6% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 89%
- Small business (10-49 employees) 9%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.3%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	8.6%	8.3%	Above 0.3%
Business Survival Rates – 1 year	88%	90%	Below 2%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Council Economic Strategy highlights the following sectors:

- Anchor – Manufacturing, Agri-Food
- Growth – Arts, Entertainment & Recreation, Professional, Scientific & Technical Services, Information & Communication (ICT)
- Opportunity – Accommodation/Food, Financial/Insurance/Admin/Support sectors

Biggest sectors by number of companies (Broad Industry Groups)[6]

- Agriculture
- Construction
- Professional, Scientific & Technical
- Retail
- Accommodation & Food

6 Inter-departmental Business Register (IDBR), NISRA

Lowest sectors by number of companies (Broad Industry Groups)

- Education
- Finance & Insurance
- Transport & Storage
- ICT
- Wholesale

5. Assets

Provides an insight into some of the key strengths within the area

Transport • Proximity to key transport: a. Belfast City Airport 10 miles b. Belfast Harbour 12 miles c. Belfast International Airport 30 miles d. Larne Harbour 33 miles	**Education** • South Eastern Regional College – Bangor, Holywood, and Newtownards Campuses • Construction Curriculum Hub
Tourism • Scrabo Tower • Strangford Lough • Mount Stewart • Bangor Waterfront and Whitespots Country Park redevelopment (both City Deal projects) • Helen's Bay • Portaferry Aquarium • Arts & Heritage offering (e.g. Open House Festival) • Proximity to Mournes	**Retail** • Large retail clusters in Bangor and Newtownards
Energy • Queens University - Marine Research Group: Tidal/Wave energy research, and Seaweed Cultivation at Strangford Lough	

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
41,217	5%	Lowest 3	9,979 (24%)	60,617 (76%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	7,828	19.0%	16.9%	Higher 2.1%
Wholesale and Retail	7,773	18.9%	16.1%	Higher 2.8%
Accommodation and Food Service	4,344	10.6%	6.6%	Higher 3.9%
Education	4,333	10.5%	9.9%	Higher 0.6%
Manufacturing	3,006	7.3%	11.1%	Lower 3.8%
Administrative and Support Service Activities	2,495	6.1%	6.7%	Lower 0.6%
Professional Scientific and Technical	2,053	5.0%	5.2%	Lower 0.2%
Public Administration and Defence; Compulsory Social Security	1,816	4.4%	6.4%	Lower 2.0%
Arts, Entertainment and Leisure	1,520	3.7%	2.0%	Higher 1.7%
Construction	1,277	3.1%	4.8%	Lower 1.7%
Other Services Activities	1,019	2.5%	1.8%	Higher 0.7%
Transport and Storage	971	2.4%	3.8%	Lower 1.4%
Real Estate	814	2.0%	1.3%	Higher 0.7%
Information and Communication	778	1.9%	3.3%	Lower 1.4%
Financial Services and Insurance	652	1.6%	2.4%	Lower 0.8%
Water Supply, Sewerage and Waste Management / Remediation	403	1.0%	1.0%	Equal
Agriculture, Forestry and Fishing	85	0.2%	0.1%	Higher 0.1%
Mining and Quarrying	0	0.0%	0.2%	Lower 0.2%
Electricity, Gas, Steam and Air Conditioning Supply	0	0.0%	0.3%	Lower 0.3%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Human Health and Social Work Activities

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[7]

Provides an insight into investment activity by Invest NI supported companies

- Denroy Group (Northern Ireland)
- Echlinville Distillery (Northern Ireland)
- Mash Direct (Northern Ireland)
- Munster Simms (United States)
- Clandeboye Estate (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

7 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal Projects

Details of capital projects through City and Growth Deals, and other government projects

- **Ards & North Down Innovation Hub (Shed 1.0), £10.4m** - Innovation Hub aimed at Film/TV/Animation and Digital companies
- **Bangor Waterfront regeneration, £72.8m** (DfC led)
- **Whitespots Country Park redevelopment, £8.5m** (DAERA led)

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 councils in the Belfast Region City Deal.

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Economic Strategy

The Integrated Strategy for Tourism, Regeneration and Economic Development 2018-2023 sets out the Council's vision "All people in Ards and North Down will benefit from a prosperous economy."

The aims are:

- To grow the number of jobs and business productivity within the Borough
- To grow visitor spend and overnight stay within the Borough

The targets set in relation to these aims are:

- Increase job growth by 22% resulting in an additional 7,500 jobs by 2030
- To increase GVA per head in the Ards and North Down area to at least the NI average by the end of the strategy period (2030).
- Increase share of Overnight Trips from 6% in 2016 to 10% in 2030
- Associated Visitor Expenditure to increase from £46m in 2016 to £82m in 2030 (*Assumption that overnight trips in NI increase to 5 million by 2030*)

Other key headlines include:

- A skills, apprenticeship, and volunteering programme - Key objective will be to address skills gaps by helping schools and colleges to fully understand the skills needs of local businesses, so that educational programmes and careers advice can be accurately targeted. This will involve the establishment of an Employability and Skills Forum, providing a structured link between key organisations. It would also support local businesses in developing their own skills base in Economic Development and Tourism.
- Town and village flexible working spaces - The hubs will also be used to encourage new business start-ups to establish locally, providing entrepreneurs the flexible space and support they need in the most convenient locations. The hub network will link to larger business and innovation centres within the Borough, so that business growth can be supported locally wherever possible.

- Carbon reduction strategy - This will involve the identification and implementation of measures that can demonstrably lower emissions within the Borough. Target areas are likely to include switching where possible to renewable energy sources while taking further steps to conserve energy through building insulation and updated technologies. Transportation is another area where change can be affected by encouraging increased walking and cycling, while promoting greater use of hybrid and electric vehicles.

Council's DRAFT Corporate Plan 2024-2028

The council vision is 'A Sustainable Borough'.

The Councils three priorities are:
- Increased economic growth attracting more businesses and jobs
- Reduce carbon emission
- Improved wellbeing through social inclusion and reduced inequality

A number of outcomes support these priorities such as:
- We are an environmentally resilient Council and Borough, meeting our net zero carbon targets.

This includes commitments to:
- Developing and funding a plan to transition Council operations to implement net zero carbon targets
- Promoting responsible behaviours that focus on reducing carbon emissions while enabling resilience to climate change
- We have a thriving and sustainable economy

This includes commitments to:
- Supporting the growth of key business sectors by focusing on business support, employability skills and required infrastructure
- Prioritising economic growth within the low carbon sector
- Helping people maximise their lifelong potential by increasing their skills, knowledge and employability
- Participating in partnerships to improve connectivity (e.g. digital) across the Borough

Community Planning Partnership priorities

- *All people in Ards and North Down fulfil their lifelong potential*: make Ards and North Down a great place for children and young people to thrive, people to grow old, and where it is easy to acquire the skills for learning, life and work
- *All people in Ards and North Down enjoy good health and wellbeing*: empower people to take control of their personal wellbeing and make better life choices by increasing opportunities for people to adopt more active lifestyles
- *All people in Ards and North Down live in communities where they are respected, safe and feel secure*: increase the amount of quality shared spaces, developing greater respect among communities and cultures, and ensuring people are safe in their homes, within their community and in all public spaces

Labour Market Partnership priorities

The following themes have been identified as local priorities:

- *Economic inactivity:* Activities identified by the LMP as a means of addressing this theme are - Enterprise Readiness Programme, Rapid Response Academies and Mentoring Programme
- *Youth unemployment:* Activities identified by the LMP as a means of addressing this theme are- Distribution of workplace videos to new year groups to showcase local employers and job opportunities in the local area
- *Disability:* Activities identified by the LMP as a means of addressing this theme are - Academy for People with Disabilities to develop skills for available work opportunities e.g. hospitality, retail, customer service, where opportunities are available locally
- *Skill and labour supply:* Activities identified by the LMP as a means of addressing this theme are - Transport Academy to address shortages of HGV drivers, PSV drivers and coach drivers, Academies in sectors such as construction, Digital/IT, Admin/office work and an Employer led Up-skilling Programme

3.3 Armagh City, Banbridge & Craigavon Borough Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 220,330 (11.5% of total NI population)[8]
- Working age population (16-64) – 135,600 (61.5% of Armagh City, Banbridge & Craigavon total population)
- Employment rate – 76.6%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	8	£51,632	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	1=	2.1%	1.5%
Business Birth Rate (of active businesses, 2022)	3	9.0%	8.3%
FDI - New Jobs (% total, 2015-22)	9=	0.2%	-
Export Intensity (exports as % of all sales, 2022)	3	20%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	10	5.9%	9.2%

8 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	3	£518.50	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	7	84.8%	85.5%
Employees in Secure Employment (2021-22)	2	98.1%	95.6%

Regional Balance

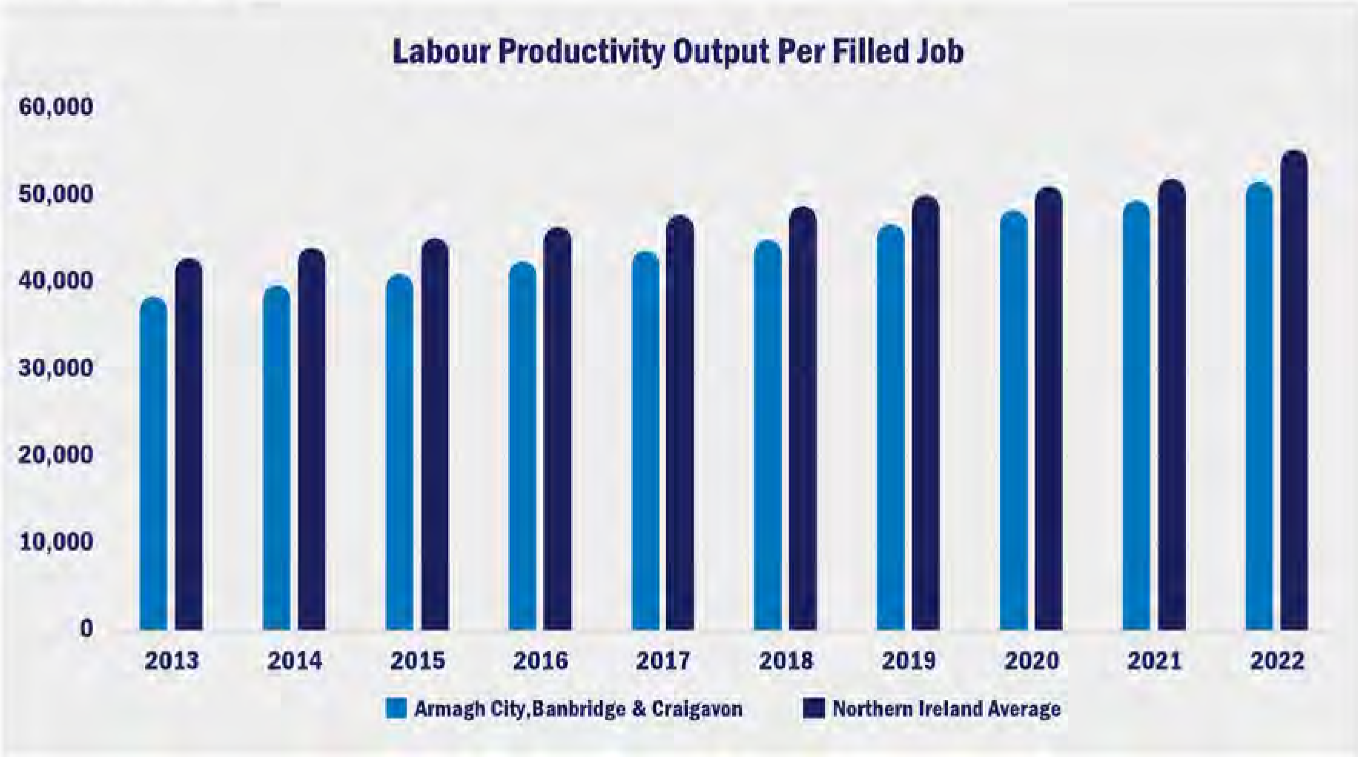
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	5	76.6%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	4	20.9%	24.7%
Gross Domestic Household Income (per head, 2021)	8	£17,216	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	6	38.0%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	7	10.2	9.8
Renewable Electricity Generation (MW/h per household, 2022)	8	2.0	5.6

Performance against Economic Vision core metrics

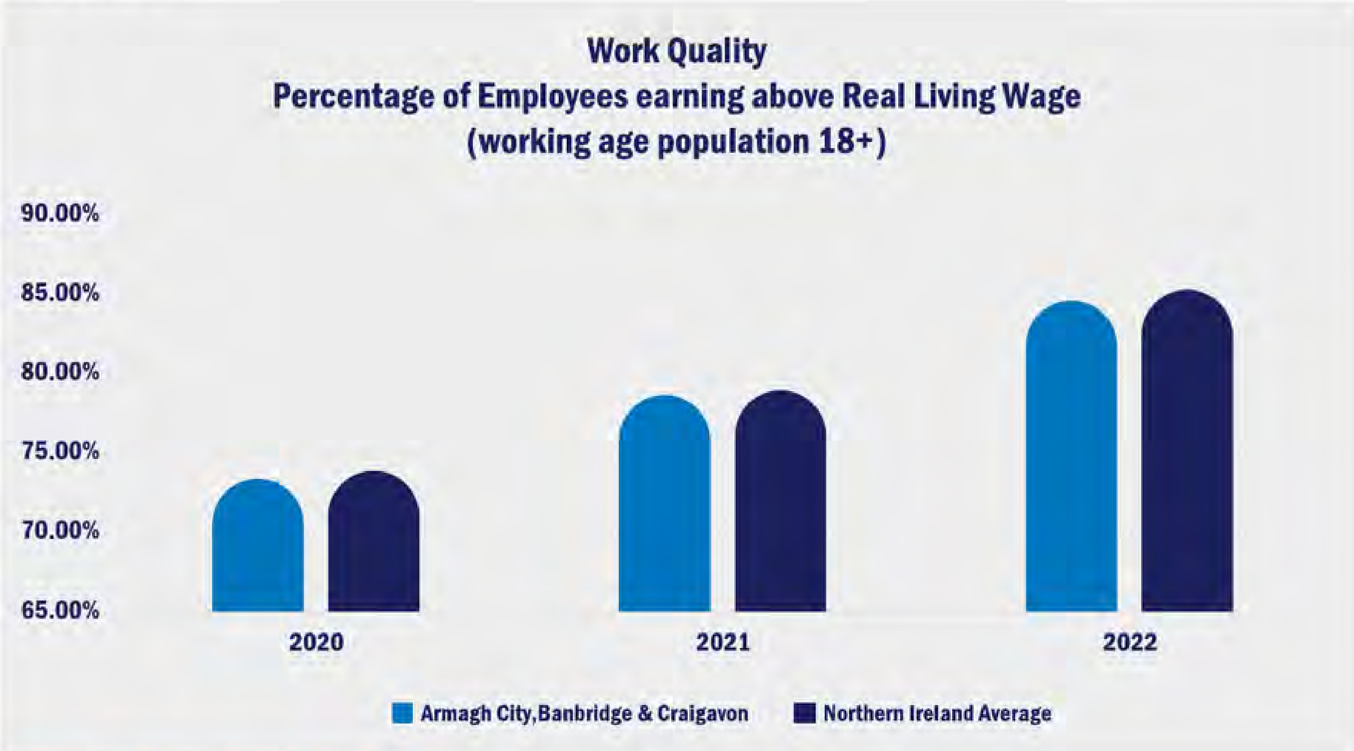
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Build on BERD Intensity** – Armagh, Banbridge and Craigavon has the second highest rate of BERD intensity in NI (R&D spending by businesses as a proportion of output) at 2.1%. This is only marginally lower than the region with the highest R&D intensity (Belfast). The NI average is 1.5% in 2022.
- **Increase Labour Productivity** – Historically, high business expenditure on Research and Development stands in contrast with relatively low productivity in the LGD. In 2022, output per job was the fourth lowest among the LGDs (£51,632 compared to an NI average of £55,364). This may reflect several constraints including lower than average rates of tertiary education attainment in the area, or lower than average non-R&D related investment.
- **Increase FDI** – There is clear potential to increase the area's share of inward investment which may positively contribute to future, upward productivity growth.
- **Increase Total Early-Stage Entrepreneurship Activity (TEA) Rate** – At 5.9% of the working age population, rates of early-stage entrepreneurship in Armagh, Banbridge and Craigavon are the second lowest in NI. Fostering entrepreneurship within the area will be important in enhancing business competitiveness, which in turn will support both employment and productivity growth.

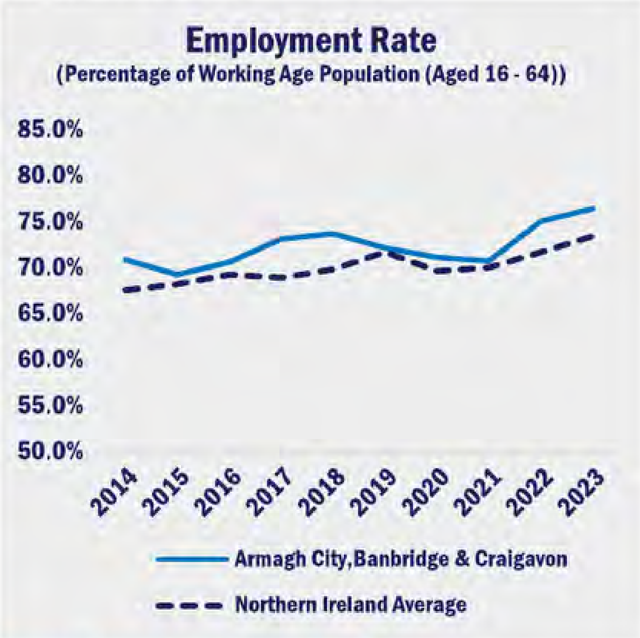
Good Jobs



Source: Labour Force Survey, NISRA

- **Build on Median Wages** – Gross weekly median wages (according to LGD of work) are the third highest of any LGD at £518.50. It should be noted that this remains lower than the NI median weekly wage rate for all employees (£528.90) due to the outsized influence of Belfast on NI median pay.
- **Maintain Secure Employment** – the area has the second highest proportion of employees reporting secure employment at 98.1% (NI average of 95.6%). It will be important to maintain security of employment as more people enter the workforce, either for the first time or after a period of unemployment or non-participation in the labour force

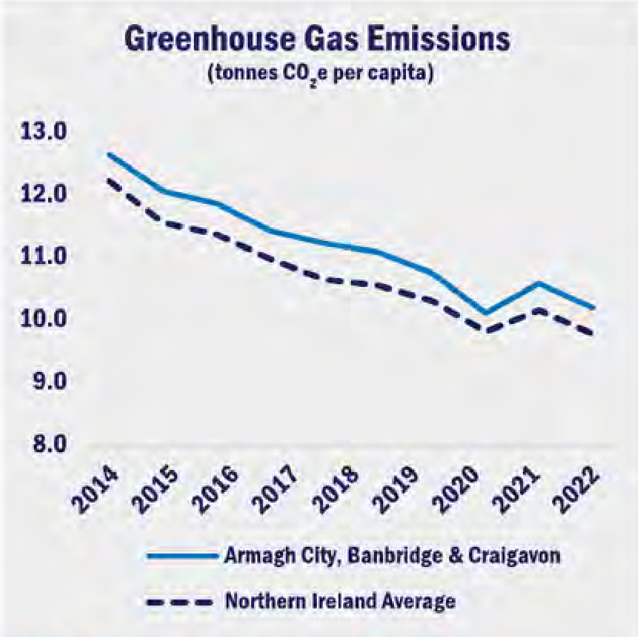
Regional Balance



Source: Labour Force Survey, NISRA

- **Increase Tertiary Educational Attainment Level 4+ Rate** – in 2023 Armagh, Banbridge and Craigavon had the sixth lowest rate of tertiary qualification attainment, amongst the working age population at 38% (NI average is 39.7%).
- **Build on Employment and Economic Inactivity Rates** – the working age employment rate in Armagh, Banbridge and Craigavon is the fifth highest in NI at 76.6% (NI average of 73.6%). The employment rate in the area is around 2.9pps lower than the LGD with the highest employment (Mid & East Antrim 79.5%) The economic inactivity rate in the area is the fourth lowest in NI at 20.9% (NI average of 24.7%).

Decarbonisation



Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Increase Renewable Electricity Generation** - Armagh City, Banbridge and Craigavon has the fourth lowest level of Renewable Electricity Generation with 2.1 MW/h per household, although this has grown from 1.6 in 2019. The highest level was 24.4 MW/h per household in Fermanagh and Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Male Inactivity Rate	4	17.9%	21.2%
Female Inactivity Rate	3	23.5%	28.2%
% of Male Population Engaged in Education or Training	8	12.3%	14.4%

Source: Labour Force Survey, NISRA

- Armagh City, Banbridge and Craigavon has the third lowest rate of female economic inactivity in NI at 23.5% and fourth lowest rate for male inactivity at 17.9%. The gap between male and female participation rates is also smaller than that for NI as a whole (5.6pps compared to 7.0pps).
- Certain types of professions seem to benefit from higher relative wages in the area compared to others. In 2023, the hourly median wage for skill level 3 employees (which includes technical professions, skilled trades etc.) was around 6% higher than the NI average while hourly median pay for the most skilled employees was only 1% higher than the regional average.

- Armagh, Banbridge and Craigavon has a relatively low proportion of working age people with no qualifications (10.4% in 2023 compared to an average of 12.3%). Its qualification profile is unusually weighted towards non-tertiary qualifications. In 2023, 51.6% of working age people in the region had between RQF1 and RQF3 level qualifications, the second highest proportion among NI LGDs.
- The proportion of those aged 25 to 64 engaged in education or training is relatively low compared to the NI average, particularly for males. In 2022, around 12.3% of males in this range were engaged in education and training compared to an NI average of 14.4%.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 9,390 – 12% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 91%
- Small business (10-49 employees) 8%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.3%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	9.0%	8.3%	Higher 0.7%
Business Survival Rates – 1 year	92%	90%	Higher 2%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Council Corporate Plan 2023-27 stated that growth sectors are Agri-Food, Advanced Engineering and Manufacturing, and Health and Life Sciences.

Biggest sectors by number of companies (Broad Industry Groups)[9]

- Agriculture
- Construction
- Retail
- Production
- Professional, Scientific & Technical

9 Inter-departmental Business Register (IDBR), NISRA

Lowest sectors by number of companies (Broad Industry Groups)

- Education
- Finance & Insurance
- ICT
- Health
- Property

5. Assets

Provides an insight into some of the key strengths within the area

Transport • M1 route • A1 Belfast-Dublin corridor • Rail connection to Belfast & Dublin • Proximity to key transport: 1. Warrenpoint Port 25 miles 2. Belfast City & International Airports 30 miles 3. Belfast Harbour	**Education** • Southern Regional College – Armagh, Banbridge, Lurgan, Portadown Campus' • Life Sciences Curriculum Hub
Tourism • St Patrick's Cathedral • Armagh Observatory & Planetarium • Navan Centre & Fort • FE McWilliam Gallery • Lough Neagh (Oxford Island Discovery Centre) • The Argory & Ardress House • Proximity to Mournes	**Retail** • Large retail clusters in Armagh City, Banbridge and Craigavon
Cross-border opportunities • Dublin - Belfast Economic Corridor • Irish Central Border Area Network (ICBAN)	

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
81,998	10%	2nd highest	21,381(26%)	60,617 (74%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	15,431	18.8%	16.9%	Higher 1.9%
Wholesale and Retail	14,675	17.9%	16.1%	Higher 1.8%
Manufacturing	13,644	16.6%	11.1%	Higher 5.6%
Education	7,189	8.8%	9.9%	Lower 1.1%
Administrative and Support Service activities	4,951	6.0%	6.7%	Lower 0.7%
Construction	4,802	5.9%	4.8%	Higher 1.1%
Transport and Storage	4,684	5.7%	3.8%	Higher 1.9%
Accommodation and Food Service	4,008	4.9%	6.6%	Lower 1.7%
Professional Scientific and Technical	3,441	4.2%	5.2%	Lower 1.0%
Public Administration and Defence; Compulsory Social Security	3,176	3.9%	6.4%	Lower 2.6%
Arts, Entertainment and Leisure	1,503	1.8%	2.0%	Lower 0.1%
Other Services Activities	1,214	1.5%	1.8%	Lower 0.3%
Water Supply, Sewerage and Waste Management / Remediation	831	1.0%	1.0%	Equal
Real Estate	767	0.9%	1.3%	Lower 0.3%
Financial Services and Insurance	675	0.8%	2.4%	Lower 1.6%
Information and Communication	611	0.7%	3.3%	Lower 2.6%
Mining and Quarrying	263	0.3%	0.2%	Higher 0.1%
Electricity, Gas, Steam and Air Conditioning Supply	72	0.1%	0.3%	Lower 0.2%
Agriculture, Forestry and Fishing	61	0.1%	0.1%	Lower 0.1%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Human Health and Social Work Activities

7. Invest NI Activity (Top 5 Investors 2018-19 to 2022-23)[10]

Provides an insight into investment activity by Invest NI supported companies

- Almac (Northern Ireland)
- Thompson Aero Seating (China)
- EOS IT Management Solutions (Northern Ireland)
- Alternative Heat (Northern Ireland)
- Classic Mineral Water (Irish Republic)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

10 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

Estimated investment in excess of £100m across the following projects:

- **Agri-Bio Innovation Centre (ABiC)** – Regional centre providing an innovation bridge across the agri-supply chain supporting (agri-tech, food tech, climate tech) innovators with space, knowledge, and connections
- **Carn Seagoe Charlestown Innovation** – Targeted at industrial activity spread across Seagoe, Carn and Charlestown area of Craigavon and will deliver new innovative decarbonisation solutions which will drive productivity, deliver new additional jobs, and reduce carbon emissions in the area
- **Industrial Investment Challenge Fund** – Aims to close the productivity gap by providing support to product improving technology and innovation projects in Mid South West
- **Innovation Programme** - Innovation pot

DfC

- Armagh Gaol

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Corporate Plan 2023-27

Commitments:

- Maximise the potential of the MSW Growth Deal and Regional Economic Strategy
- Provide and facilitate opportunities for growth, investment, productivity, and skills development in the local economy
- Seek investment in infrastructure and connectivity

Actions:

- Through MSW develop business cases for investment of reinvigoration in Armagh Gaol, Green Energy District in Carn - Seagoe and an Agri-Bio Innovation Centre by 2030
- Develop an Inclusive Growth Strategy and Plan by 2025
- Deliver opportunities in growth and investment
- Increase the value of the Borough's tourism economy by 10% annually
- Deliver the Agriculture Strategy by 2027
- Develop an Infrastructure Strategy to evidence the need, priority, and deliverability of critical infrastructure across the Borough
- Facilitate and seek the delivery of schemes that will increase access to sustainable and active transport, providing links to key local amenities and improving connections between settlements

Dublin-Belfast Economic Corridor (DBEC)

Actions

- **Skills**: analyse the corridor's workforce and publish snapshots of insights, develop a clear skills policy and strategy specific to the corridor, become active in skills development in priority sectors
- **Infrastructure**: identify infrastructure gaps and map assets with development potential, develop business cases for relevant infrastructure projects
- **Research & Development**: Grow DBEC's profile within the R&D community and support relationship building, secure funding for innovation hubs along the corridor. Explore the potential for developing a circular economy approach along DBEC
- **Ways of working**: Be an active player in the corridor's ecosystem, through activities, workshops, and events. Resource the Partnership with skilled staff and provide capacity to continue to grow. Complement member councils' seed and ongoing funding with external funding sources. Develop a clear marketing strategy and actively engage with stakeholder groups

Labour Market Partnership priorities:

A cross-cutting theme was **Deprivation and Social Inclusion.**

The following themes have been identified as priorities:

- **Economic Shock**: Actions – Vocational training interventions to support unemployed to re-skill and refresh their work experience. Sectors should be aligned to those identified with most employment need during consultation e.g. Warehousing & Building, Retail Administration, Dispensary, Green Growth, Fabrication, Childcare. Childcare support and part time job opportunities should be offered. Training programme for first time employers - recruitment, payroll, HR, legal and insurance consideration
- **Economic Inactivity**- Actions - A women returners programme to support women ready to return to work. Offer intensive support, 22 weeks programme with 8-12 week placement. To include - mentoring, CV building, addressing gaps in CV confidence building, zoom interview training. Self-employment programme focussing on women, as some women need more flexible options. Noted that childcare should be provided. Part time work opportunities and placements given some of the decline in female economic activity is linked to quality-of-life issues
- **Disability** - Actions A disability programme (group of 12 max) with job coaching & mentoring with an 8-12 week paid placement and support for employer as well. Reverse Jobs fair - Training programme for Employers taking on staff for the first time should include a module related to Disability. The self-employment programme for women could also be widened to incorporate those with disabilities as this is an option favoured by this disadvantaged group due to the flexibility it can offer
- **Skilled Labour Supply**: Actions - Programme intervention to link underemployed individuals with a mentor to act as an ambassador for them, support with CV and employment related paperwork. Support with converting qualifications to equivalent values in NI. Support or signposting where appropriate for English for Non-English speakers training. There is a need for intervention programme for workers with low or no qualifications/ skills. This would include working with employers to upskill workers supported by local training providers

Community Planning Partnership priorities:

- **Skilled & Enterprising Economy:** Localise Careers Advice and Guidance for lifelong learning. Increase co-ordination of skills and employment services, business, and statutory agencies. Explore a local Skills/Employability pipeline to provide a service pathway focussed on the individual. Support local businesses to recruit highly skilled, specialist roles. Encourage collaboration and signposting to support start-ups and existing businesses. Improve links between the private sector and schools training providers to support entrepreneurship activities in new and growing businesses
- **Develop a Tourism Economy**: Embed new tourism brand for the Borough with trade partners. Increase overnight visitors to the Borough. Embed signature events as key part of destination development. Promote investment in new and existing tourism products
- **Creative Place:** no recent info available
- **Enhanced and Revitalised Place:** Our rich and varied built heritage and natural assets are protected, enhanced, and expanded for current and future generations to enjoy. Our distinctive and vibrant urban and rural areas are at the heart of community and economic life
- **Healthy Community:** People are making positive lifestyle choices. They are more resilient and better equipped to cope with life challenges
- **Confident and Welcoming Community:** Everyone has opportunities to engage in community life and shape decisions – we have a strong sense of community belonging and take pride in our area. Our borough is a safe, respectful, and peaceful environment

3.4 Belfast City Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 348,000 (18.2% of total NI population)[11]
- Working age population (16-64) – 229,600 (66% of Belfast Total population)
- Employment rate – 67.9%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	1	£61,868	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	1=	2.1%	1.5%
Business Birth Rate (of active businesses, 2022)	1	9.2%	8.3%
FDI - New Jobs (% total, 2015-22)	1	78%	-
Export Intensity (exports as % of all sales, 2022)	8	15%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	2	11.8%	9.2%

11 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	1	£596.80	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	6	85.2%	85.5%
Employees in Secure Employment (2021-22)	10	93.9%	95.6%

Regional Balance

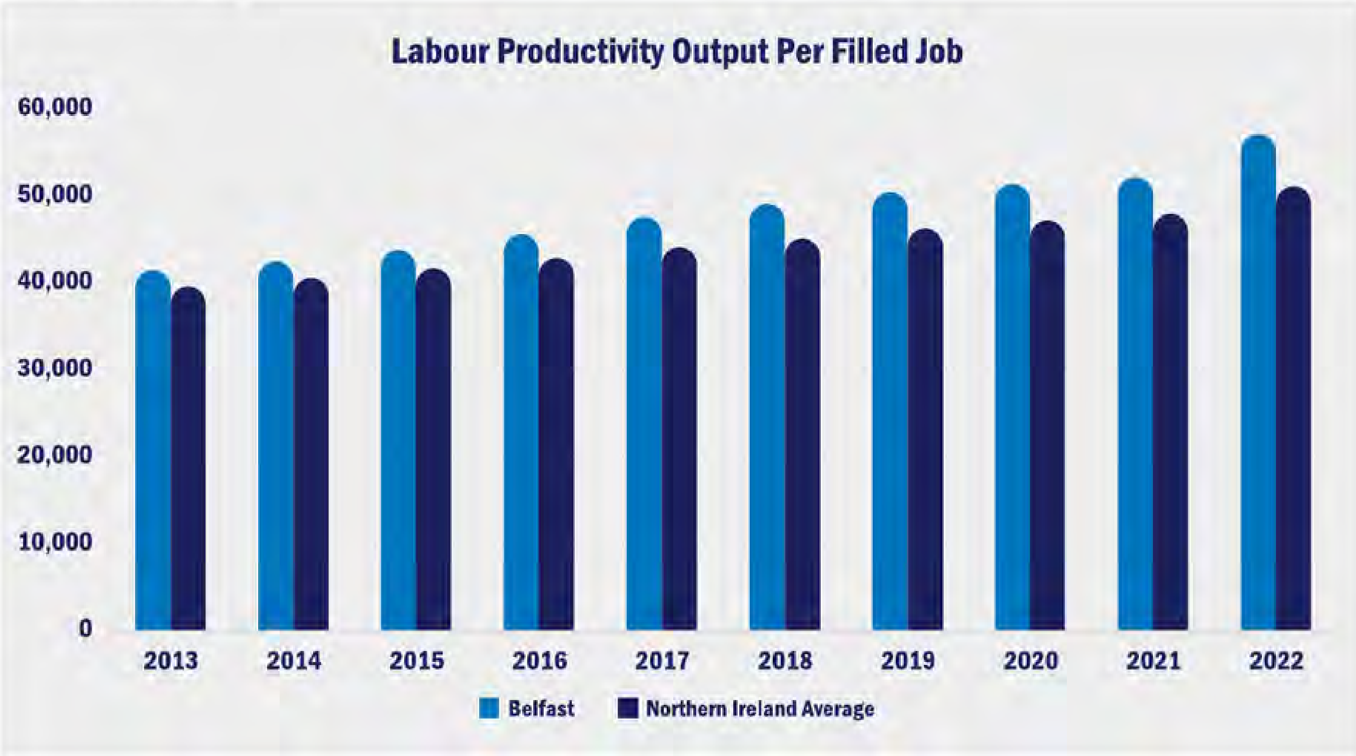
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	10	67.9%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	9	30.5%	24.7%
Gross Domestic Household Income (per head, 2021)	5	£17,507	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	7	37.6%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	1	4.7	9.8
Renewable Electricity Generation (MW/h per household, 2022)	11	0.1	5.6

Performance against Economic Vision core metrics

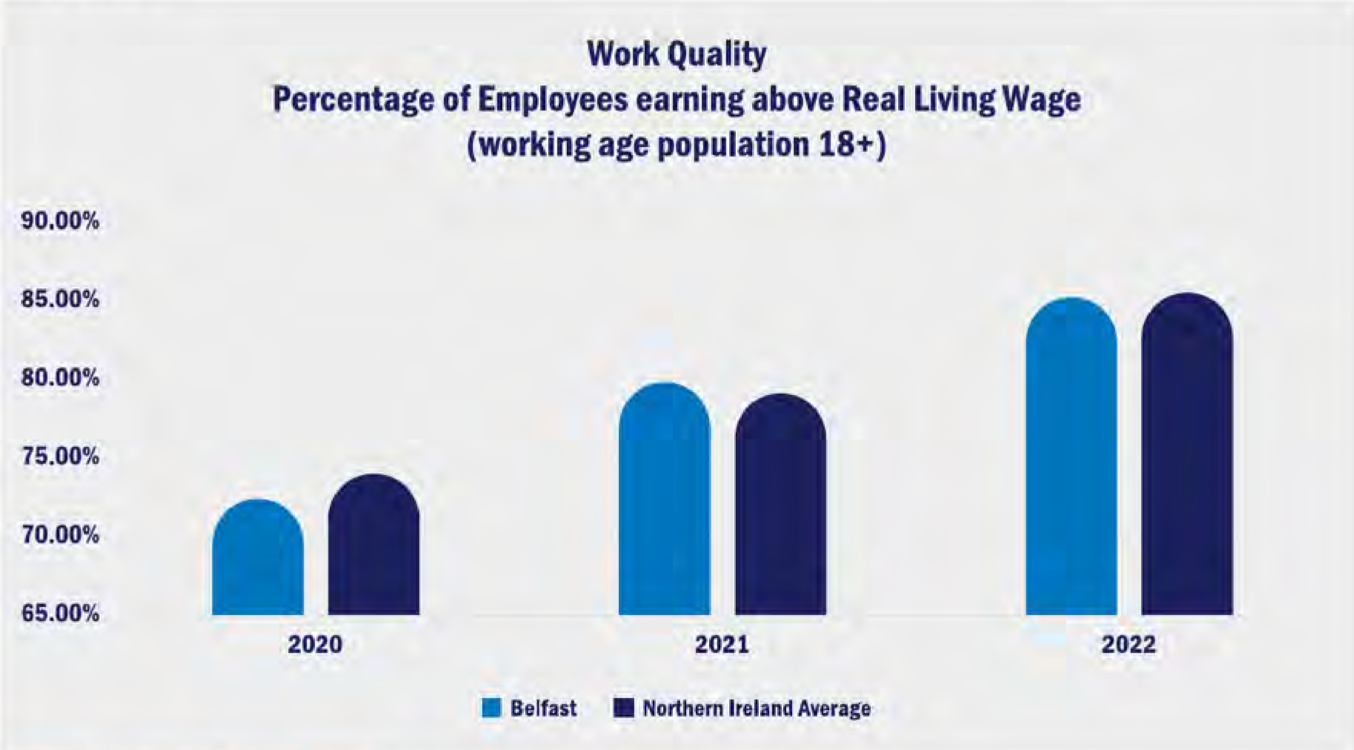
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Build on labour productivity** - In 2022, Belfast had the highest labour productivity of any LGD on an output per filled job basis (£61,868). This was £6,504 higher than the NI average, although productivity has (until recently) been lower than the UK average. Increased productivity growth in Belfast City will play an important role in improving productivity in surrounding areas as well.
- **Build on Business R&D Intensity** - Business R&D intensity in Belfast is the highest of any LGD (2.1% as of 2022). The area accounts for more than two fifths of all business R&D investment in NI and in 2022, business expenditure on R&D was more than three times that of the next highest spending LGD. The area is home to a number of key institutions (such as universities) that are crucial to R&D activity and there is ample scope to increase such activity further.

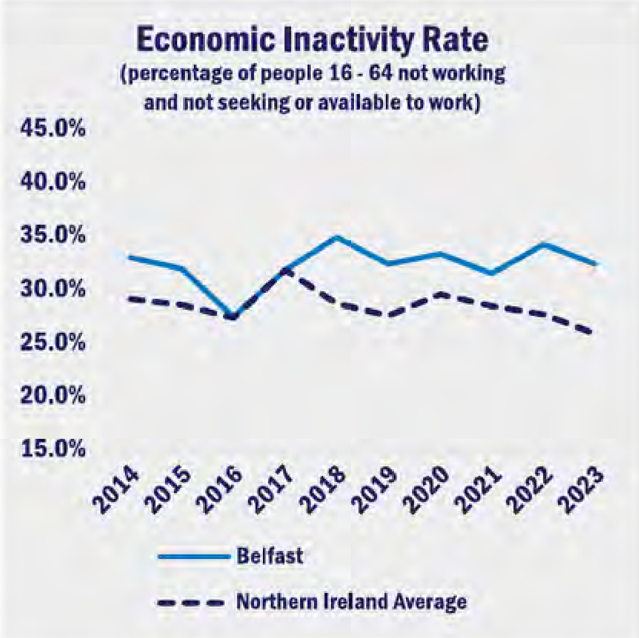
Good Jobs



Source: Labour Force Survey, NISRA

- **Increase Secure Employment Rate** - Belfast has a lower-than-average proportion of employees reporting secure employment. Over the period of July 2021 to June 2022, 93.9% of employees over the age of 18 reported being in secure employment, the second lowest proportion of any LGD.
- **Build on Median Wage –** As might be expected, Belfast has the highest weekly median wages (on an LGD of work basis) in NI (£596.80 compared to the NI median of £528.90 in 2023).This reflects the status of the area as a major hub of economic activity although it is notable that median weekly wages for those residing in Belfast are slightly lower than the median wage for all NI employees (£515.60 per week compared to £528.90 per week).

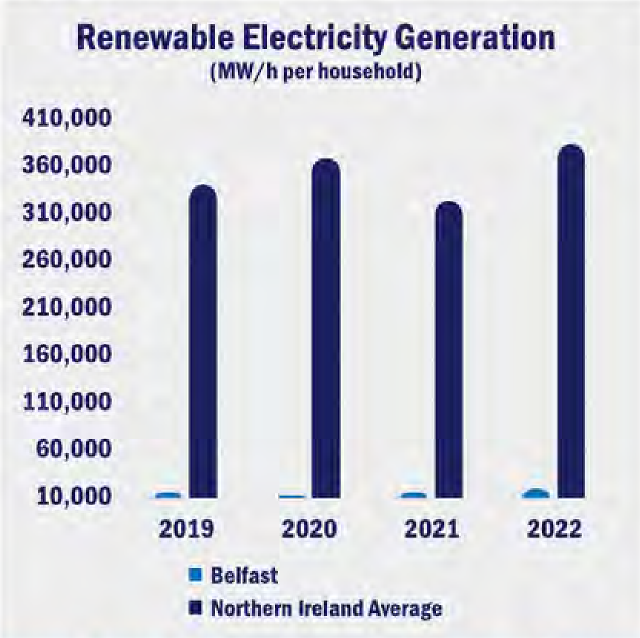
Regional Balance

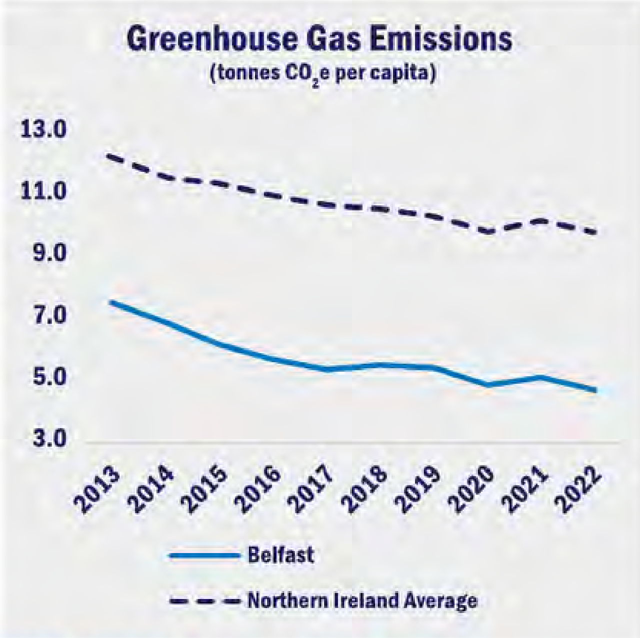


Source: Labour Force Survey, NISRA

- **Increase Employment Rate** – Belfast's status as a hub for economic activity and major employers means that it attracts significant number of workers from outlying areas and performs well across a series of indicators. However, outcomes between those that work in the area compared to those that live there can be asymmetric. In 2023, Belfast had the second lowest working age employment rate of any LGD at 67.9%. This was significantly below the NI average (73.8%).
- **Reduce Economic Inactivity** - In 2023, the working age economic inactivity rate was 30.5%. This was 5.8pps higher than the regional average of 24.7%. The rate is also substantially larger than many of the immediate surrounding areas (Lisburn and Castlereagh 21.7%, Antrim & Newtownabbey 19.8% and Ards and North Down 23.6%).

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Increase Renewable Electricity Generation** - Belfast has the lowest level of Renewable Electricity Generation of all regions with 0.1 MW/h per household. This has shown no change from 2019. The highest level was 24.4 MW/h per household in Fermanagh and Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Proportion of working age population with no qualifications	11	15.6%	12.3%
Gender Participation Gap	4 (Joint)	5.6pps	7.0pps

Source: Labour Force Survey, NISRA

- Amongst NI LGDs, Belfast has the largest proportion of the working age population with no qualifications. Although this proportion has decreased over the ten years, to 2023 it has done so at a slower pace than any other LGD.
- The gap between male and female inactivity rates in the area is somewhat lower than the NI average (5.6pps compared to 7.0pps). This is largely due to male inactivity rates being considerably higher than average.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 11,300 – 14% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 81%
- Small business (10-49 employees) 14%
- Medium business (50-249 employees) 4%
- Large Business (250+ employees) 1.2%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	9.2%	8.3%	Higher 0.9%
Business Survival Rates – 1 year	90%	90%	Equal

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

The Draft Council Economic Strategy 2022-2030 states:

Growth sectors – Digital, ICT and Creative Industries, FinTech and Financial Services, Life and Health Sciences and Advanced Manufacturing and Engineering.

Biggest sectors by number of companies (Broad Industry Groups)[12]

- Professional, Scientific & Technical
- Retail
- Accommodation & Food
- Construction
- ICT

Lowest sectors by number of companies (Broad Industry Groups)

- Agriculture
- Education
- Motor Trades

12 Inter-departmental Business Register (IDBR), NISRA

5. Assets

Provides an insight into some of the key strengths within the area

Transport • Belfast City Airport • Belfast Harbour • Belfast Grand Central Station • Proximity to key transport: 1. Belfast International Airport 18 miles 2. Larne Harbour 23 miles	**Education** • Universities: Ulster University, Queen's University and Open University • Colleges: Belfast Met - Titanic Quarter, Millfield, e3 Springvale and Castlereagh Campus' • Digital & Information Technology Curriculum Hub • Studio Ulster - virtual production (City Deal Project)
Tourism • Belfast City Hall • Crumlin Road Gaol • Belfast Lough • Titanic Quarter • Cathedral Quarter • Botanic Gardens, Ulster Museum • CS Lewis Square • Greenways • Belfast Stories (City Deal project)	**Retail** • Significant city centre offering including Castle Court and Victoria Square • Holywood Exchange
Energy • Geothermal opportunity – Stormont Estate	

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
236,475	30%	1st	70,662 (30%)	165,814 (70%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	35,309	14.9%	16.9%	Lower 2.0%
Public Administration and Defence; Compulsory Social Security	26,692	11.3%	6.4%	Higher 4.8%
Wholesale and Retail	24,942	10.5%	16.1%	Lower 5.5%
Administrative and Support Service activities	24,490	10.4%	6.7%	Higher 3.6%
Professional Scientific and Technical	22,183	9.4%	5.2%	Higher 4.2%
Education	20,883	8.8%	9.9%	Lower 1.1%
Information and Communication	16,557	7.0%	3.3%	Higher 3.7%
Accommodation and Food Service	15,235	6.4%	6.6%	Lower 0.2%
Financial Services and Insurance	12,584	5.3%	2.4%	Higher 2.9%
Manufacturing	9,169	3.9%	11.1%	Lower 7.2%
Transport and Storage	7,089	3.0%	3.8%	Lower 0.8%
Other Services Activities	5,237	2.2%	1.8%	Higher 0.4%
Construction	4,689	2.0%	4.8%	Lower 2.8%
Arts, Entertainment and Leisure	4,647	2.0%	2.0%	Equal
Real Estate	4,103	1.7%	1.3%	Higher 0.5%
Water Supply, Sewerage and Waste Management / Remediation	1,531	0.6%	1.0%	Lower 0.3%
Electricity, Gas, Steam and Air Conditioning Supply	1,089	0.5%	0.3%	Higher 0.2%
Mining and Quarrying	33	0.0%	0.2%	Lower 0.2%
Agriculture, Forestry and Fishing	12	0.0%	0.1%	Lower 0.1%

Source: Business Register & Employment Survey, NISRA

Largest Employment Sector Human Health and Social Work Activities

7. Invest NI activity – Top 5 Investors 2018-19 to 2022-23[13]

Provides an insight into investment activity by Invest NI supported companies

- Spirit Aero Systems (United States)
- PwC (Great Britain)
- PA Holdings (Great Britain)
- Huhtamaki Foodservice Delta (Finland)
- KPMG (Irish Republic)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

13 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

Innovation/Digital

- **Institute of Research Excellence for Advanced Clinical Healthcare (iREACH), £62m** - state of the art clinical research facility to conduct clinical trials
- **Momentum 1.0, £70m** - aims to catalyse growth in key sectors within the Belfast Region through providing challenge-led solutions for the digital economy and society
- **Centre for Digital Healthcare Technology (CDHT), £40.1m** - centre for digital technology and living labs in areas of cardiology, diabetes, respiratory and stroke
- **Studio Ulster, £31.7m** - to become established as a 'Tier 1' centre of excellence in R&D and innovation in Virtual Production
- **Design Smarter Digital Twin, £37.7m** - first National Digital Twin Centre, concentrating on the development of digital twin solutions across the maritime, aerospace and defence sector

Tourism

- **Belfast Stories, £100m** - visitor experience that will offer remarkable first-person accounts of the city by the people who call it home, located close to Belfast's Cathedral Quarter

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 councils in the Belfast Region City Deal.

DfI

- **Belfast Rapid Transport Phase 2** - £35m City Deal contribution
- **Lagan Pedestrian & Cycle Bridge** - £12.1m City Deal contribution

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Draft Economic Strategy 2022-2030

The economic targets the Council aims to achieve:

- By 2031, Belfast City Council and government partners will have brought forward 11,500 low carbon housing units in the city
- By 2030, they will have developed at least four technology specific, place-based growth clusters where innovative businesses co-locate near key assets, including those funded by the Belfast Region City Deal
- By 2030, support 75% of Belfast's social enterprises to earn greater than 75% of their income from trading revenues, bringing performance in line with UK averages, as opposed to the current proportion of 58%

- By 2030, support over 50% of employers to actively integrate inclusion and sustainability principles into their business operations, to be measured by Belfast Business Sustainability Survey
- Deliver on Belfast's roadmap for Reduced Carbon Emission by achieving a 66% reduction in city-wide emissions by 2025, 80% by 2030, and 100% by 2050 (based on baseline emissions in 2000)
- Coordinate the public and private investments of £1.6bn necessary by 2030 to deliver a cost-effective low carbon transition
- By 2050, complete the retrofit of up to 75,000 buildings in Belfast, in keeping with the Belfast carbon roadmap target
- Support the delivery of training and upskilling to 1,200 individuals by 2030 to ensure that the construction sector can undertake the work required to decarbonise the housing stock
- Double the number of Belfast residents entering the labour market each year with mid-level skills (at NQF levels 3-5) to 3,150 by 2027, building off the 2017 estimate of 1,570 people per year
- Reduce the proportion of working age population with no qualifications from 14.2 % in 2017 to 10% by 2030, in alignment with the Belfast Agenda
- By 2030, reduce the proportion of economically inactive people of working age to 23 % from 30.1% in 2020, in alignment with the Belfast Agenda
- Improve the Total Early-Stage Entrepreneurial Activity (TEA) rate in Belfast's adult population by 9% by 2025 and increase female TEA rate by 50% by 2028
- Increase business start-ups by an additional 280 businesses above current trends by 2025
- Increase business three-year survival rates from 53.8% to 85% by 2028
- Increase business investment per capita from £111 to £150 by 2030
- Increase private sector R&D investment from £335 per capita in 2019 to £500 per capita in 2030
- Increase public sector R&D investment £134 per capita in 2019 to £200 per capita in 2030
- By 2030, increase the value of exports to the local economy
- By 2030, increase the value of foreign direct investment in the local economy
- Increase the value of the tourism industry in Belfast from £417m in 2019 to £800m by 2030

Dublin-Belfast Economic Corridor (DBEC)

Actions

- Skills - analyse the corridor's workforce and publish snapshots of insights. Develop a clear skills policy and strategy specific to the corridor. Become active in skills development in priority sectors
- Infrastructure- Identify infrastructure gaps and map assets with development potential. Develop business cases for relevant infrastructure projects
- Research & Development- Grow DBEC's profile within the R&D community and support relationship building. Secure funding for innovation hubs along the corridor. Explore the potential for developing a circular economy approach along DBEC
- Ways of working- Be an active player in the corridor's ecosystem, through activities, workshops, and events. Resource the Partnership with skilled staff and provide capacity to continue to grow. Complement member councils' seed and ongoing funding with external funding sources. Develop a clear marketing strategy and actively engage with stakeholder groups

Labour Market Partnership Targets

- Reduce the working age economic inactivity rate in Belfast
- Reduce youth unemployment (18-24) in Belfast
- Increase the median wage in the city
- Increase the percentage of working age adults with disabilities employed in Belfast

Community Planning Partnership Targets

- Increase the percentage of school leavers progressing into positive destinations (such as employment or further and higher education) from a baseline of 95% in 2021-22
- Reduce the gap between those entitled to free school meals and those who are not, from a baseline of 35% in 2018-19
- Reduce the working age economic inactivity rate (excluding students) within the city from 23% to 18%
- Increase the employment rate for people living with a disability from 37% to 42%
- Increase the number of new business start-ups from 1,435 per year to 1,800
- Reduce the number of jobs paid below the real living wage from 14.7% to 10% or less
- Develop and implement place-based community plans which will deliver the ambitions set out within the Belfast Agenda
- Drive down poverty within our neighbourhoods including those most deprived
- Reducing carbon emissions by 66% by 2025
- Support at least two community energy schemes to implementation stage

3.5 Causeway Coast & Glens Borough Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 141,300 (7.4% of total NI population)[14]
- Working age population (16-64) – 85,700 (60.6% of Causeway Coast & Glens Total population) Employment rate – 68.3%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	9	£50,430	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	9	0.6%	1.5%
Business Birth Rate (of active businesses, 2022)	10	7.3%	8.3%
FDI - New Jobs (% total, 2015-22)	11	0.0%	-
Export Intensity (exports as % of all sales, 2022)	7	16%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	11	5.6%	9.2%

14 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	10	£459.10	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	10	82.2%	85.5%
Employees in Secure Employment (2021-22)	11	93.2%	95.6%

Regional Balance

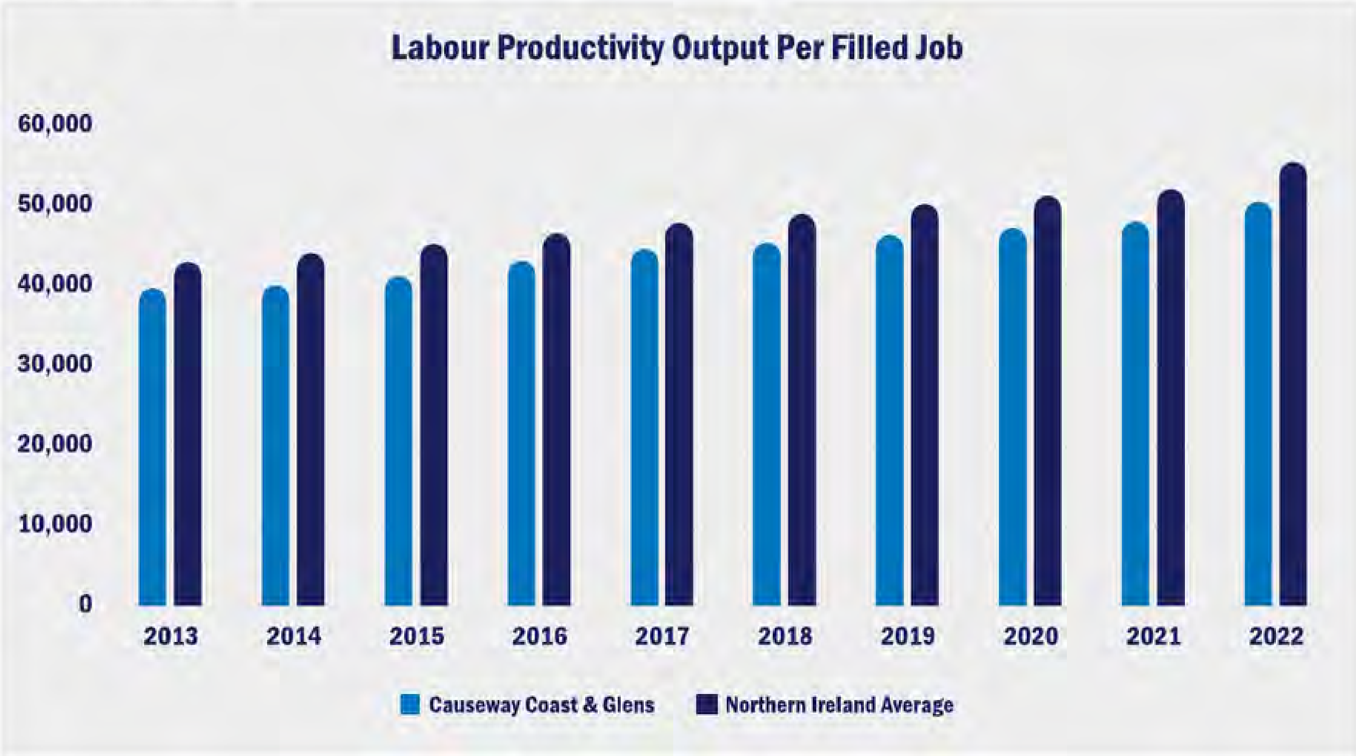
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	9	68.3%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	10	30.6%	24.7%
Gross Domestic Household Income (per head, 2021)	10	£16,918	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	8=	35.8%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	9	13.5	9.8
Renewable Electricity Generation (MW/h per household, 2022)	2	16.8	5.6

Performance against Economic Vision core metrics

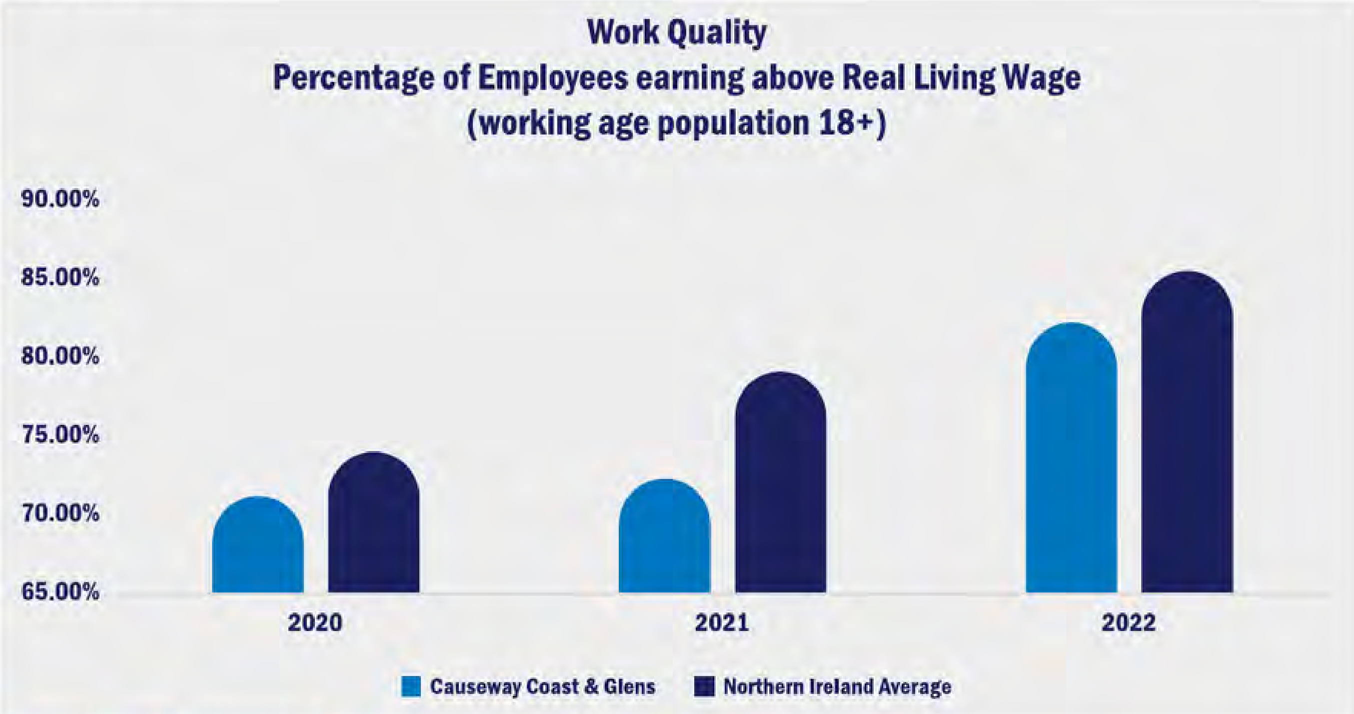
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase Labour Productivity** – In 2022, average productivity in Causeway Coast and Glens was the third lowest in NI at £50,430 (NI average of £55,364). The area has one of the lowest tertiary qualification attainment rates amongst NI LGDs and while this has increased significantly (+13.7pps) in the ten years to 2023, this has yet to translate into increased productivity growth.
- **Increase Entrepreneurial Activity –** In light of low productivity and lower than average employment in the area, the low incidence of early-stage entrepreneurial activity and new business births is particularly stark. Supporting growth in new businesses will contribute to increased employment opportunities for those living in the area as well as enhancing competitiveness

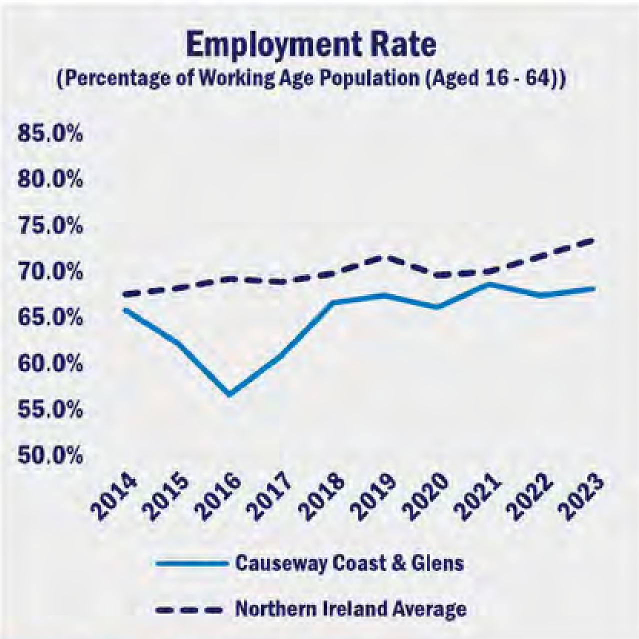
Good Jobs

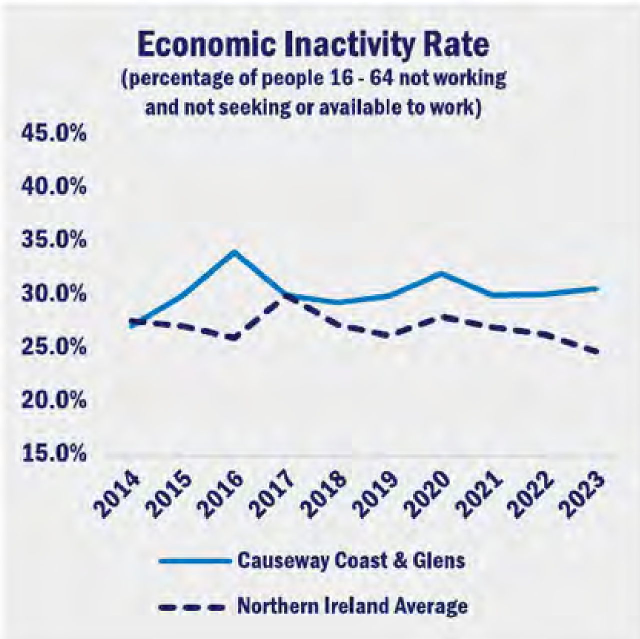


Source: Labour Force Survey, NISRA

- **Increase Median Hourly and Real Living Wages** – Causeway Coast and Glens has the second lowest median weekly wages of any area in the North. In 2023, median weekly pay (LGD of work) was £459.10, around 13% lower than the median weekly wage for the North as a whole.

Regional Balance

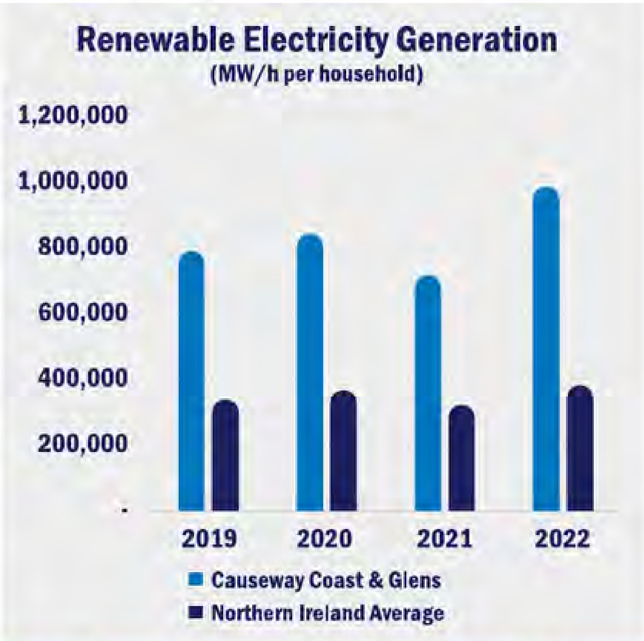


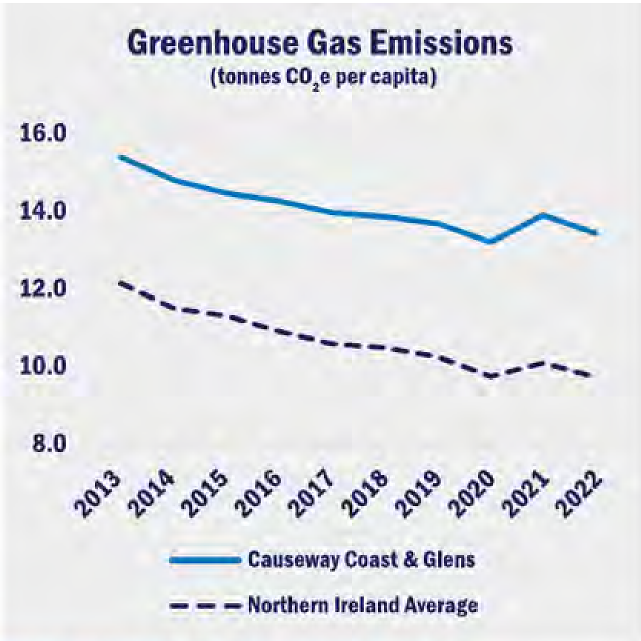


Source: Labour Force Survey, NISRA

- **Increase Disposable Household Income -** Reflecting weaker pay and employment outcomes, the area has the second lowest gross disposable household income per head in NI. In 2021, GDHI per head was £16,918, about 4.1% lower than the NI average.
- **Increase Employment Rate** – In 2023, the working age employment rate in Causeway Coast and Glens is the third lowest in NI at 68.3% (NI average of 73.6%). Improving labour market outcomes will be important in affecting positive change in other indicators, such as household disposable income.
- **Increase Tertiary Level Educational Attainment Level 4+** - the rate of tertiary qualification attainment in the region (2023) was 35.8%, significantly lower than the NI average (39.7%) and 14.3pps lower than the best performing area.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Build on Renewable Electricity Generation** - Causeway Coast and Glens generates a proportionally large amount of renewable electricity. In 2022, total renewable electricity generation in the area per household was 16.8 MW/h against an NI average of 5.6 MW/h. This is the second highest rate in the north.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
GINI Coefficient	2	0.29	0.30
% of Female (16-64) Engaged in Education or Training	2	20.1%	18.2%
Gender Pay Gap	3	0.9%	8.3%
Female Inactivity Rate	10	36.4%	28.2%

Source: Family Resources Survey, DfC/Labour Force Survey, NISRA/ Annual Survey of Hours and Earnings, NISRA

- Causeway Coast and Glens performs comparably well on some indicators related to inclusion. The GINI Coefficient for the area is slightly lower than the NI average (0.29 compared to 0.30). At 5.1%, the gender pay gap in the area is lower than the regional average (8.7%), but this seems to be a function of low rates of pay overall.
- The area has the second highest proportion of women (25-64) engaged in education or training. In 2022, 20.1% of females in this age group were participating in education or training compared to a regional average of 18.2%.
- Similar to other areas in the North-West, Causeway Coast and Glens has a large incidence of economic inactivity in the working age population. This is particularly acute for women, with the female inactivity rate in the area standing at 35.1% in 2022. This is the second highest in NI and 8.2pps higher than the average for the north.
- Causeway Coast and Glens has an unusually low gender pay gap compared to most LGDs. In 2023, median hourly wages for women were only 0.9% lower than the equivalent median hourly wage for men. This however should be viewed in the context of low female participation rates and may partly reflect the composition of female employment in the area (i.e. public sector industries such as education and healthcare accounting for a large proportion of skilled jobs in the area).

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 6,160 – 8% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 91%
- Small business (10-49 employees) 7%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.2%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	7.3%	8.3%	Lower 1%
Business Survival Rates – 1 year	95%	90%	Higher 5%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Council Corporate Strategy 2021-2025 states:

- Wholesale and retail trade; repair of motor vehicles and motorcycles sector
- Human health and social work activities
- Education

Approximately 25% of employment in the Borough is in the public sector.

Biggest sectors by number of companies (Broad Industry Groups)[15]

- Agriculture
- Construction
- Retail
- Accommodation & Food
- Production

Lowest sectors by number of companies (Broad Industry Groups)

- Education
- Finance & Insurance
- ICT
- Property
- Transport

15 Inter-departmental Business Register (IDBR), NISRA

5. Assets

Provides an insight into some of the key strengths within the area

Transport • Rail and bus connections to Derry City and Belfast • Proximity to key transport: 1. City of Derry Airport 23 miles 2. Foyle Port 30 miles	**Education** • Ulster University – Coleraine Campus • 2 Colleges: Northern Regional College & North West Regional College – Limavady, Greystone, Ballymoney, Coleraine campus' • Entrepreneurship & Health and Social Care Curriculum Hubs
Tourism • Causeway Coastal Route • Mussenden Temple • Giant's Causeway • Dunluce Castle • Ballintoy Harbour • Dark Hedges • Glens of Antrim • Host of The Open at Royal Portrush • North West 200 • Old Bushmills Distillery	**Retail** Retail cluster at Coleraine

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
43,382	5%	Lowest 3	11,034 (25%)	32,347 (75%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Wholesale and Retail	8,244	19.0%	16.1%	Higher 2.9%
Human Health and Social Work Activities	7,738	17.8%	16.9%	Higher 0.9%
Education	5,236	12.1%	9.9%	Higher 2.2%
Accommodation and Food Service	4,762	11.0%	6.6%	Higher 4.3%
Manufacturing	4,395	10.1%	11.1%	Lower 0.9%
Construction	2,409	5.6%	4.8%	Higher 0.8%
Public Administration and Defence; Compulsory Social Security	2,360	5.4%	6.4%	Lower 1.0%
Administrative and Support Service activities	1,767	4.1%	6.7%	Lower 2.6%
Professional Scientific and Technical	1,298	3.0%	5.2%	Lower 2.2%
Transport and Storage	1,177	2.7%	3.8%	Lower 1.1%
Arts, Entertainment and Leisure	897	2.1%	2.0%	Higher 0.1%
Real Estate	726	1.7%	1.3%	Higher 0.4%
Other Services Activities	708	1.6%	1.8%	Lower 0.2%
Information and Communication	478	1.1%	3.3%	Lower 2.2%
Financial Services and Insurance	468	1.1%	2.4%	Lower 1.3%
Water Supply, Sewerage and Waste Management / Remediation	350	0.8%	1.0%	Lower 0.2%
Mining and Quarrying	208	0.5%	0.2%	Higher 0.2%
Agriculture, Forestry and Fishing	126	0.3%	0.1%	Higher 0.2%
Electricity, Gas, Steam and Air Conditioning Supply	33	0.1%	0.3%	Lower 0.2%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Wholesale and Retail

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[16]

Provides an insight into investment activity by Invest NI supported companies

- Maine Surface Finishing (Northern Ireland)
- SJC Hutchinson Engineering (Northern Ireland)
- Woodland Kitchens (Northern Ireland)
- WD Meats (Northern Ireland)
- Armstrong Medical (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

16 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

Estimated investment of £100m across the following projects:

- **Centre for Food & Drug Discovery (CFDD)** – Centre that seeks to improve health through nutritional & pharmaceutical innovation
- **Business Innovation & Incubation Hub (BIIH)** – Hub that will support young businesses to innovate, collaborate and grow within a highly enabled digital environment
- **Innovation Hub at NWRC Limavady** – Delivery of innovative business support at the Limavady campus
- **Connected Causeway** – Tourism and infrastructure project that seeks to make the wealth of vibrant tourist attractions of the North Coast more accessible, whilst simultaneously alleviating seasonal pressure on the road system within the surrounding area

DAERA/DfC

- Bushmills regeneration
- Dungiven regeneration
- Cushendall Innovation Centre

DfC

- Coleraine Leisure & Wellbeing Centre

DfI

- Portrush to Bushmills Greenway

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Corporate Strategy 2021-2025

Economic targets outlined as:

Outcomes	Indicators
The performance of the economy of the Borough to have recovered to pre Covid-19 levels	Rates for employment and unemployment return to 2019 levels Employment Rate (16-64 years) return to 2019 levels No of PAYE/VAT Registered Businesses at 2019 levels
Council contributes towards an improving median wage per employee within the NI norm	Household Earnings increasing from £368 per week to £400 per week (over the duration of the Corporate Strategy)
Council contributes to increasing early-stage entrepreneurial activity in line within the norm for Northern Ireland	Increasing total early-stage entrepreneurial activity from 5% to 5.5% by 2025
Council contributes to an increasing tourism spend per visitor per trip	Increasing visitor spend per trip from £170 per visitor per trip in 2018 to £200 per visitor per trip by 2025
Council contributes to increasing business	Increase business start-up rate to the NI norm Improve business survival rate in line with the NI norm
Council contributes to improving levels of business innovation in the Borough	Increase rate of innovation activity across the timeframe of the Corporate Strategy

Labour Market Partnership targets

- Work Ready Aim- Develop and provide a support programme for the economically inactive
- Business Start-up Seed Fund Aim- To support and empower individuals who are economically inactive, enabling their progress into self-employment
- Retrain Plus Aimi- Support the economically inactive with the opportunity to retrain and learn new skills, and secure sustainable employment
- Personal Learning Account (PLA) Aim- Enabling upskilling within priority sectors in CCAG. Participants can get new skills and qualifications that local employers need to find employment, or help them progress in their current career
- Job Fairs- Delivery of 12 job fairs across the borough where employers attend with job opportunities and create awareness of potential jobs
- Causeway Area Learning Partnership Careers and Industry Engagement- Co-Design of Careers Action Plan with CALP and Careers Service
- Sustaining Lifelong Learning Aim- Supporting communities, in the areas of most need, based on high deprivation, by developing formal and informal opportunities to encourage return to learning and workforce

Community Planning Partnership priorities

- To promote the unique offer of the Atlantic Link Enterprise Campus (ALEC)
- To enhance the capability of businesses to enter and expand outside markets separate to NI
- To increase the level of innovation in the Causeway Coast and Glens area
- Develop a new Energy Strategy for the Causeway Coast and Glens area
- To increase the level of entrepreneurship and indigenous business growth in the Borough
- To co-ordinate actions to increase skills

3.6 Derry City & Strabane District Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 150,800 (7.9% of total NI population)[17]
- Working age population (16-64) – 94,100 (62.4% of Derry City & Strabane Total population)
- Employment rate – 65.4%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	11	£47,229	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	5=	1%	1.5%
Business Birth Rate (of active businesses, 2022)	2	9.1%	8.3%
FDI - New Jobs (% total, 2015-22)	2	10.7%	
Export Intensity (exports as % of all sales, 2022)	4	19%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	3	11.4%	9.2%

17 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	7	£492.30	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	11	79.7%	85.5%
Employees in Secure Employment (2021-22)	5	96.6%	95.6%

Regional Balance

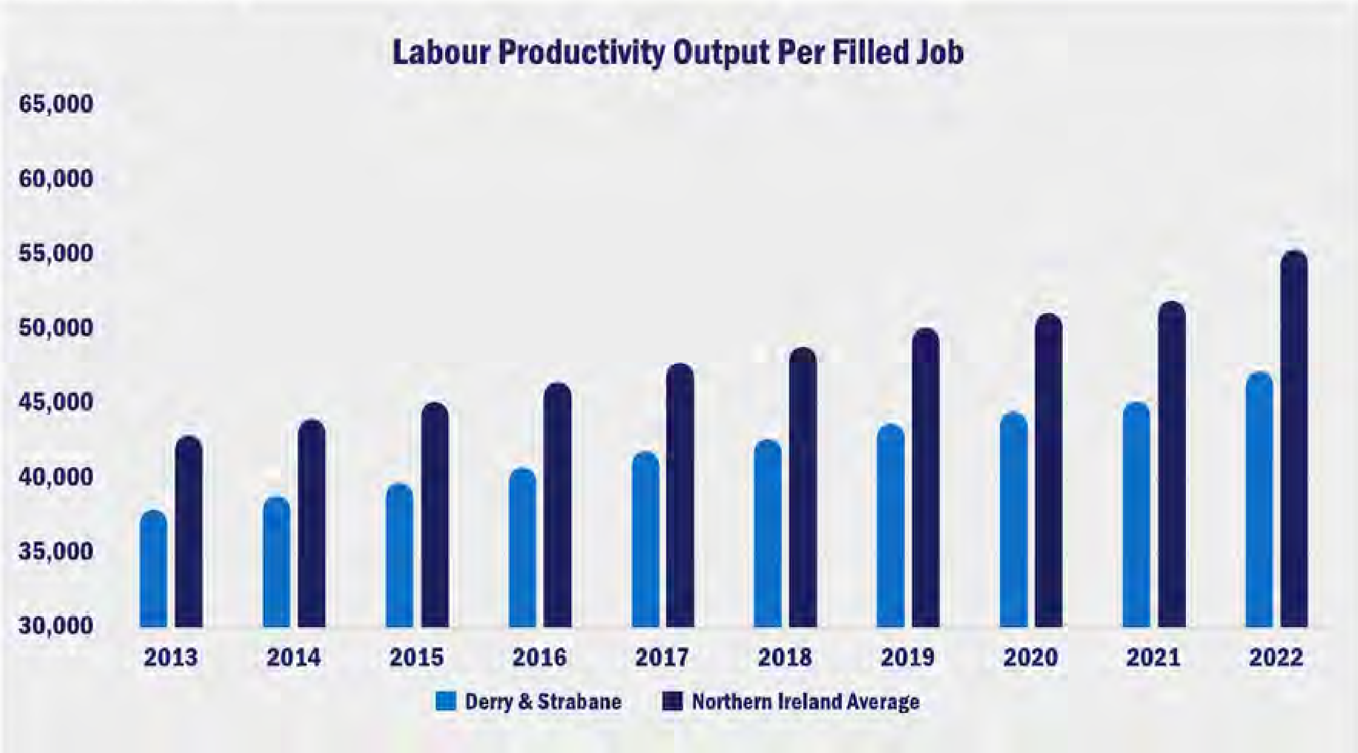
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	11	65.4%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	11	32.7%	24.7%
Gross Domestic Household Income (per head, 2021)	11	£16,572	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	8=	35.8%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	8	10.8	9.8
Renewable Electricity Generation (MW/h per household, 2022)	3	16.4	5.6

Performance against Economic Vision core metrics

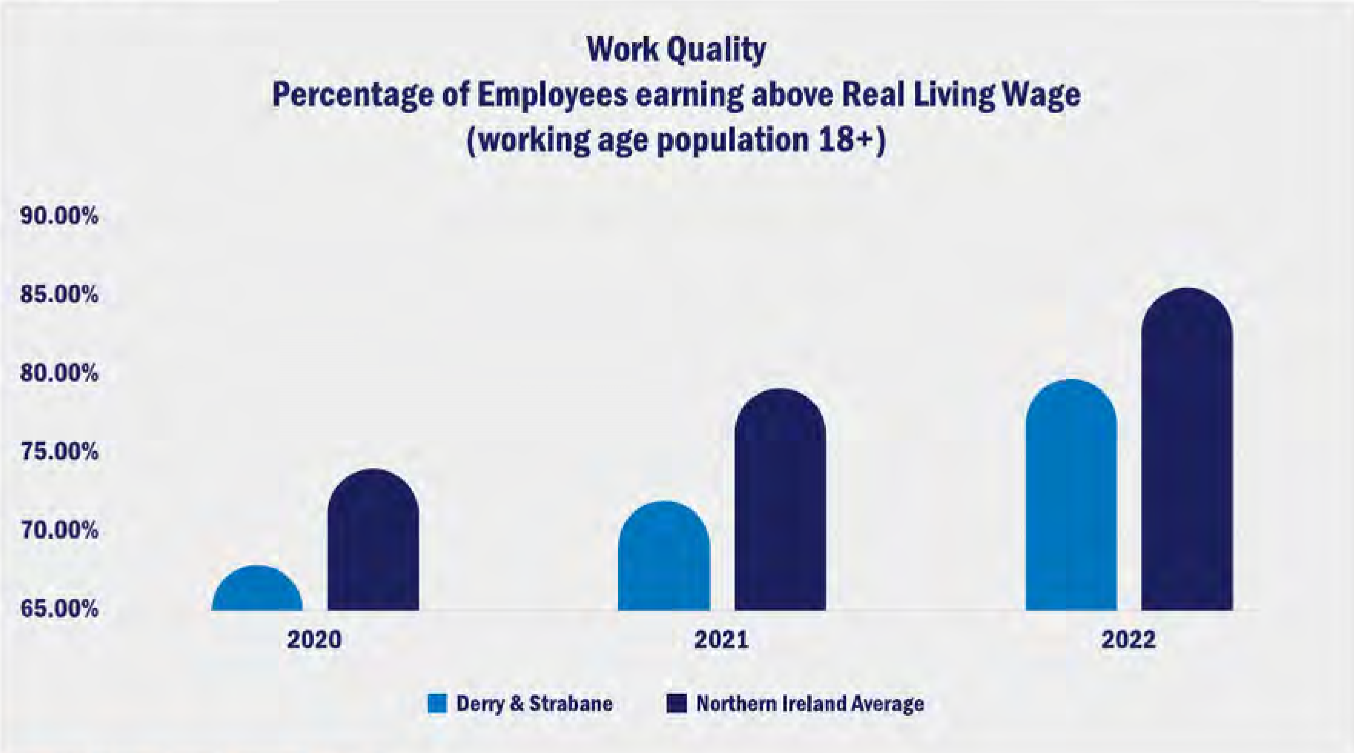
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase Labour Productivity** - In 2022, labour productivity in Derry City and Strabane was the lowest in NI at £47,229 (15.0 percentage points lower than the regional average).
- **Build on FDI New Jobs Share** – Derry City and Strabane had the second highest share of new FDI jobs created between 2015 and 2022 at 10.7% of the total. However, there is a large gap with the highest LGD, Belfast, at 78%. Supporting additional inward investment into the area (as well investment by resident firms) will be an important element in addressing persistent low productivity in the area.
- **Build on Business Births and Entrepreneurship** – The area performs strongly on several indicators related to business creation and entrepreneurship. Over the period 2021-23, the rate of early-stage entrepreneurship amongst the working age population was the third highest in NI, and the rate of new business births was the second highest of any LGD. Building on this strong performance will be important in addressing long standing adverse labour market conditions in the area as well as contributing to improved productivity growth.
- **Build on Export Intensity** - The area performs relatively well on other business indicators such as exports. In 2022, the value of exports as a percentage of all business sales (export intensity) was 19%, the fourth highest of any LGD.

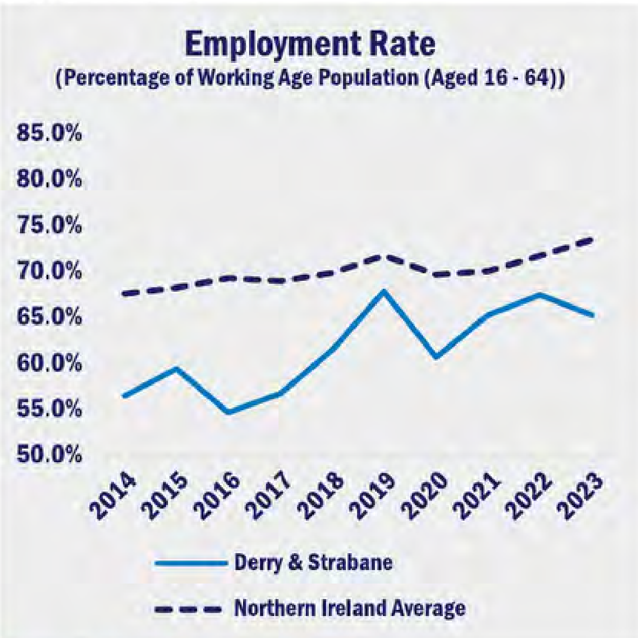
Good Jobs



Source: Labour Force Survey. NISRA

- **Increase Employees Earning above the Real Living Wage –** Reflecting low productivity in 2022 the proportion of those 18 and over earning above the Real Living Wage is almost 6pps lower than the NI average (79.7% compared to 85.5%).

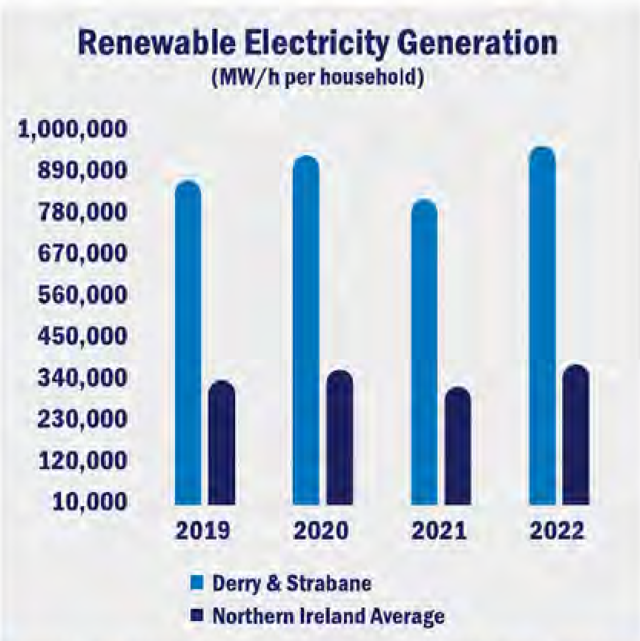
Regional Balance

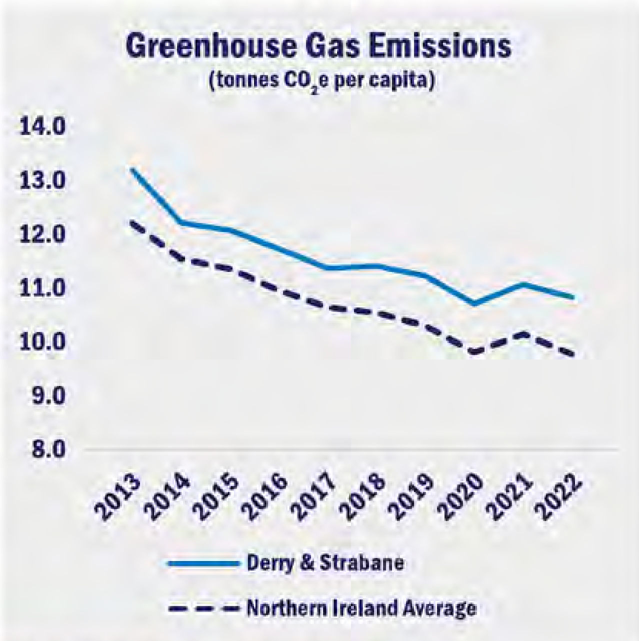


Source: Labour Force Survey, NISRA

- **Decrease Economic Inactivity Rate** - Derry City and Strabane continues to have a persistent problem with low rates of labour force participation. In 2023 the rate of economic inactivity amongst the working age population was 32.7%, the highest of any LGD and significantly higher than the NI average (24.7%).
- **Increase Employment Rate** – In 2023 employment rate in Derry City and Strabane was the lowest in NI at 65.4%. Employment rates in the area have been on an upward trajectory since at least 2014 and the gap between employment rates in the LGD and the NI average has narrowed somewhat since then (8.2pps in 2023 compared to 11.1pps in 2014).
- **Increase Gross Domestic Household Income per head** – In 2021 Derry City and Strabane had the lowest level in NI at £16,572. The NI average was £17,636 and the highest disposable income per head was £19,223 in Lisburn and Castlereagh.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Build on Renewable Electricity Generation** - Derry City and Strabane has the third highest level of Renewable Electricity Generation with 16.4 MW/h per household. Generation has also increased from 14.9 in 2019. The highest level was 24.4 MW/h per household in Fermanagh and Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
% of Working Age Pop Engaged in Education / Training	9	12.2%	14.4%
Male Inactivity Rate	11	28.3%	21.2%
Female Inactivity Rate	11	37.1%	28.2%

Source: Labour Force Survey, NISRA

- Derry City and Strabane has the highest rate of economic inactivity for both men and women of any LGD. The difference between both rates and the equivalent NI average is roughly in proportion when considering differential participation rates for men and women generally. This suggests that adverse labour market conditions within the area are pervasive rather than specific to a particular group.
- Derry City and Strabane has a notably low proportion of the working age population participating in education and/or training. In 2022 the proportion of those engaged in education or training in the area was 2.2pps lower than the NI average for men and 2.3pps lower for women. The low incidence of participation in education and/or training is likely to have negative implications for reducing working age inactivity and improving employment in the region.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 5,555 – 7% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 90%
- Small business (10-49 employees) 8%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.3%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	9.1%	8.3%	Higher 0.8%
Business Survival Rates – 1 year	91%	90%	Higher 1%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

The Integrated Economic Strategy for Derry City and Strabane District 2017-2032 has identified priority sectors which will provide the 'step-change' required for economic development and growth;

- Life Sciences and Health Sciences
- Digital Industries including Business, Professional and Financial Services
- Creative Industries focusing on broadcast production, digital publishing, music, games development and animation
- Advanced Manufacturing and Engineering
- Culture and Tourism

Biggest sectors by number of companies in council area (Broad Industry Groups)[18]

- Agriculture
- Construction
- Retail
- Professional, Scientific & Technical

Lowest sectors by number of companies in council area (Broad Industry Groups)

- Education
- Finance & Insurance
- Property
- Transport

5. Assets

Provides an insight into some of the key area strengths

Transport • Foyle Port • City of Derry Airport • North West Transport Hub • Proximity to key transport: Belfast International Airport 60 miles	**Education** • University – Ulster University Magee Campus • Northern West Regional College – Strabane, Derry (Health and Social Care Curriculum Hub)
Tourism • Walled City • Peace Bridge • Derry Girls • Wild Atlantic Way • DNA Museum (City Deal project)	**Retail** • Substantial city centre offering including Foyleside and Quayside Shopping Centres
Cross-border opportunities • Many cross-border partnerships already in existence including North West Strategic Growth Partnership, North West Tertiary Education Cluster and others • Proximity to Donegal & Letterkenny	

18 Inter-departmental Business Register (IDBR), NISRA

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
60,667	**8%**	**Mid ranking**	**19,509 (32%)**	**41,159 (68%)**

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	12,439	20.5%	16.9%	Higher 3.6%
Wholesale and Retail	9,380	15.5%	16.1%	Lower 0.6%
Education	6,774	11.2%	9.9%	Higher 1.3%
Manufacturing	6,342	10.5%	11.1%	Lower 0.6%
Administrative and Support Service activities	3,977	6.6%	6.7%	Lower 0.2%
Accommodation and Food Service	3,882	6.4%	6.6%	Lower 0.2%
Public Administration and Defence; Compulsory Social Security	3,354	5.5%	6.4%	Lower 0.9%
Construction	2,738	4.5%	4.8%	Lower 0.3%
Information and Communication	2,542	4.2%	3.3%	Higher 0.9%
Professional Scientific and Technical	1,894	3.1%	5.2%	Lower 2.1%
Transport and Storage	1,814	3.0%	3.8%	Lower 0.8%
Arts, Entertainment and Leisure	1,280	2.1%	2.0%	Higher 0.1%
Financial services and insurance	1,229	2.0%	2.4%	Lower 0.4%
Real Estate	1,124	1.9%	1.3%	Higher 0.6%
Other services activities	1,075	1.8%	1.8%	Equal
Water Supply, Sewerage and Waste Management / Remediation	492	0.8%	1.0%	Lower 0.2%
Electricity, Gas, Steam and Air Conditioning Supply	225	0.4%	0.3%	Higher 0.1%
Agriculture, Forestry and Fishing	64	0.1%	0.1%	Equal
Mining and Quarrying	42	0.1%	0.2%	Lower 0.2%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector: Human Health and Social Work Activities

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[19]

Provides an insight into investment activity by Invest NI supported companies

- Seagate Technology (United States)
- FinTrU (Great Britain)
- Alchemy Technology Services (Great Britain)
- Ebrington Leisure Holdings (Northern Ireland)
- Terex (United States)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

- **Cognitive Analytics & Digital Robotics Innovation Centre (CADRIC), £39m**
  CADRIC is the amalgamation of two, formerly separate, projects (CARL & CIDRA) into one business case. CARL aims to exploit advances in high performance computing by applying AI and machine learning techniques to sectors like advanced manufacturing, personalised medicine, and creative industries. CIDRA has a focus on manufacturing and the use of AI in smart robotic systems, recognising that core technologies have now reached sufficient maturity to provide huge opportunities for the manufacturing industry.
- **School of Medicine and Personalised Medicine Centre, £61m**
  The Minister recently announced the new Magee taskforce which will drive forward the Executive's commitment to expanding Ulster University's Derry-Londonderry Campus to 10,000 students, delivering a co-designed action plan by December 2024. The University continues to work towards the development of a new teaching and research accommodation at Ulster University's campus at Magee (£46.2m), a new medical and dental education teaching facility at Altnagelvin Hospital (£4.6m) and a new build extension to the existing Clinical Translational Research Centre (C-TRIC) facility at the Altnagelvin site (£10.9m).
- **SMART Derry Strabane Programme, £15m**
  Focuses on: Digital Enabling Infrastructure, Digital Innovation, Digital Transformation and Smart City (Testbed and Living Laboratory).
- **DNA Maritime Museum, £13m**
  Interactive, indoor, year-round visitor attraction, showcasing the significant heritage of the city and region.
- **North West Regional College (NWRC), £15m**
  Construction in Strabane of a new modern fit-for-purpose NWRC further and higher education campus.

19 Council Economic Profiles, Invest NI, March 2024

DfC

- Strabane Town Centre regeneration
- Walled City Economic Project, £15m

DfI

- Foyle Street Riverfront regeneration, £45m

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Inclusive Strategic Growth Plan 2017-2032

Key priority economic actions

- Increase third level student numbers through the significant expansion of the Ulster University at Magee (including establishment of a graduate-entry medical school) and the North West Regional College.
- Embed entrepreneurialism and creativity within all learning opportunities in collaboration with appropriate agencies.
- Develop local and sub-regional responses to skills needs and implement, review, and monitor the Skills Action Plan.
- Deliver pilot projects to include work experience and upskilling opportunities to embed core employability skills for those entering the labour market, the long term unemployed and economically inactive. Increase industry engagement in careers advice and guidance.
- Support community and parental engagement projects focusing on numeracy and literacy.
- Maximise job creation and investment opportunities in the City and Town Centres, regionally significant regeneration sites and rural areas.
- Develop more Grade A office accommodation.
- Build and strengthen clusters of industry specialism in Advanced Manufacturing, Life and Health Sciences, Digital, Creative and Cultural Industries and Tourism.
- Develop compelling business cases and support packages for Foreign Direct Investment and develop our international connections to drive growth and investment.
- Secure investment into Strabane Business Park and ensure its full utilisation.
- Develop a pilot Rural Community Broadband Scheme and roll out in multiple locations.
- Develop incubation space and opportunities for collaborative public sector shared office space.
- Provide intensive mentoring support for Entrepreneurs from under-represented groups.
- Deliver business start-up programmes and development support focused on areas of high economic inactivity and rural community hubs.

Labour Market Partnership priorities

- Economic Inactivity: Working locally and collaboratively Derry City & Strabane Labour Market Partnership will address economic inactivity as a key target group with very specific interventions and focused marketing for those furthest from opportunity.
- Long Term Unemployed: Derry City & Strabane District Council will intervene to turn the curve on unemployment. They historically maintain the highest claimant count (CC) level in NI.
- Disability: Derry City & Strabane Labour Market Partnership will develop directed, tailored, practical programmes and marketing to encourage those with disabilities to engage/re-engage in learning, and employability.
- Skilled Labour: Derry City & Strabane Labour Market Partnership will use the Skilled Labour Force theme to upskill and reskill in areas above Level 2 or where demand can be clearly evidenced, and job opportunities exist.

Community Planning Partnership priorities

- Increase third level student numbers through the significant expansion of the Ulster University at Magee to 10,000 students.
- Implement Vocational Educational Programmes for young people aged 14-18 at risk of disengaging.
- Develop local and sub-regional responses to skill needs and implement, review, and monitor the Skills Action Plan as part of the Labour Market Partnership.
- Maximise job creation and investment opportunities in our City and Town Centres, regionally significant regeneration sites and rural areas.
- Develop a pilot Rural Community Broadband Scheme and roll out in multiple locations.
- Develop a vibrant social economy, co-operative, creative and cultural sector through targeted support programmes.
- Deliver an ambitious festival and events strategy building on the success of UK City of Culture 2013 to promote the city and region as a Festival City, profiling our vibrant art scene and placing real value on our Cultural capital which will contribute to the economic impact through a yearlong festival programme.
- Develop and promote the use of the District's waterways, and particularly the River Foyle as a tourism attraction.
- Develop a strategic investment strategy for the arts and culture sector supported by ongoing impact analysis and focused on leveraging collaboration between key cultural institutions.
- Support the development of key tourism, arts, and cultural capital projects, which will have a significant impact on the delivery of the Tourism and Arts & Culture strategies including delivering the DNA Museum at Ebrington, focusing on the Walled City Development, and scoping the feasibility of further attraction development.

3.7 Fermanagh & Omagh District Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 117,000 (6.1% of total NI population)[20]
- Working age population (16-64) – 70,000 (59.8% of Fermanagh & Omagh Total population)
- Employment rate – 70.6%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	6	£53,181	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	7=	0.8%	1.5%
Business Birth Rate (of active businesses, 2022)	9	7.6%	8.3%
FDI - New Jobs (% total, 2015-22)	8	0.3%	
Export Intensity (exports as % of all sales, 2022)	2	22%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	7	8.3%	9.2%

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	6	£495.00	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	4=	86%	85.5%
Employees in Secure Employment (2021-22)	8	94.5%	95.6%

20 Mid-Year Population Estimates by LGD, NISRA

Regional Balance

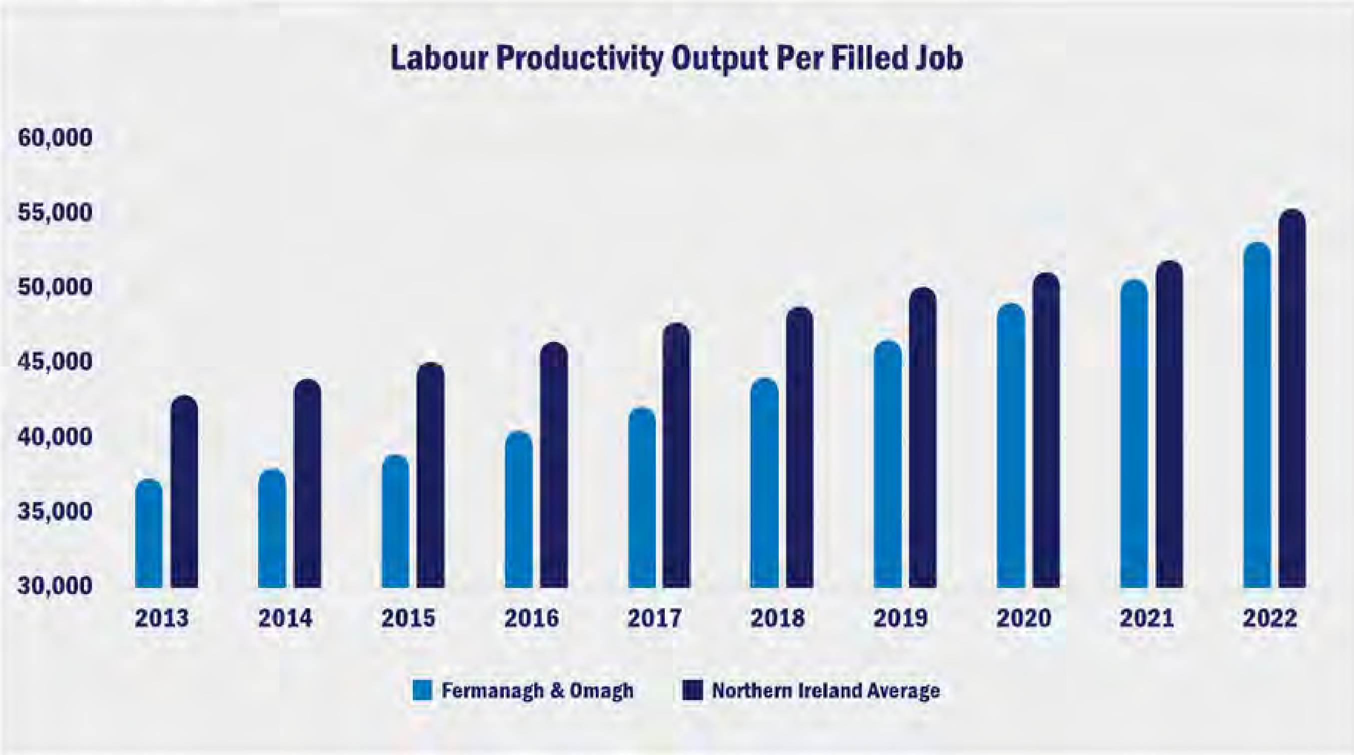
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	8	70.6%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	8	26%	24.7%
Gross Domestic Household Income (per head, 2021)	9	£17,132	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	10	35.6%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	11	19.4	9.8
Renewable Electricity Generation (MW/h per household, 2022)	1	24.4	5.6

Performance against Economic Vision core metrics

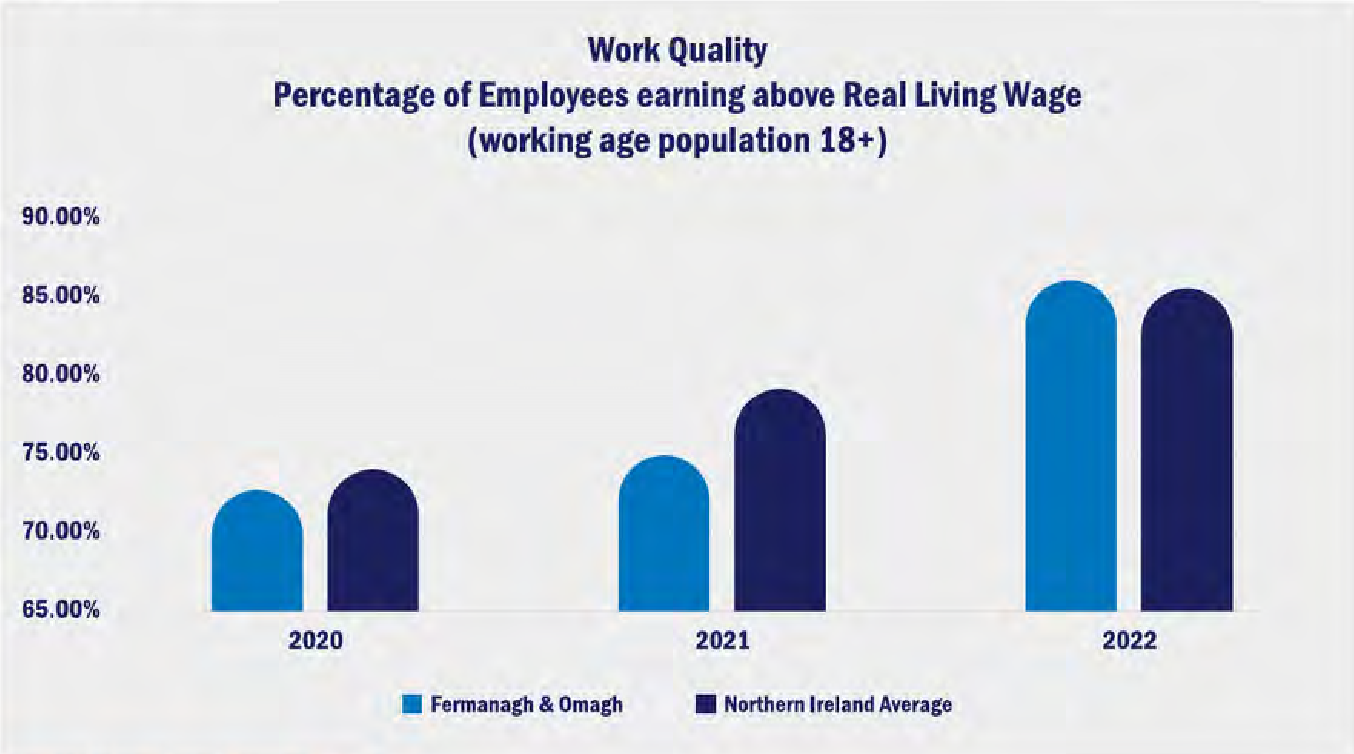
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Build on Labour Productivity** – Output per job remains below the NI average as of 2022 (around 4% lower than the regional average). However, this gap has narrowed significantly since 2013 where productivity was 16% lower than the NI average. Productivity growth in the area has accelerated in the immediate aftermath of the COVID-19 pandemic. When adjusting for inflation, output per job is 8.7% higher in Fermanagh and Omagh relative to 2019 levels, higher than any other LGD.
- **Increase Business Birth Rate and Early-Stage Entrepreneurial Activity** – In 2022 Fermanagh and Omagh had the third lowest business birth rate at 7.6% (NI average is 8.3%). The incidence of entrepreneurial activity in the area is also lower than average. Supporting the creation of new businesses would complement existing positive trends in relation to productivity.
- **Build on Export Intensity** - A significant proportion of total business sales in the area are exports (22%). This is the second highest proportion of any LGD.

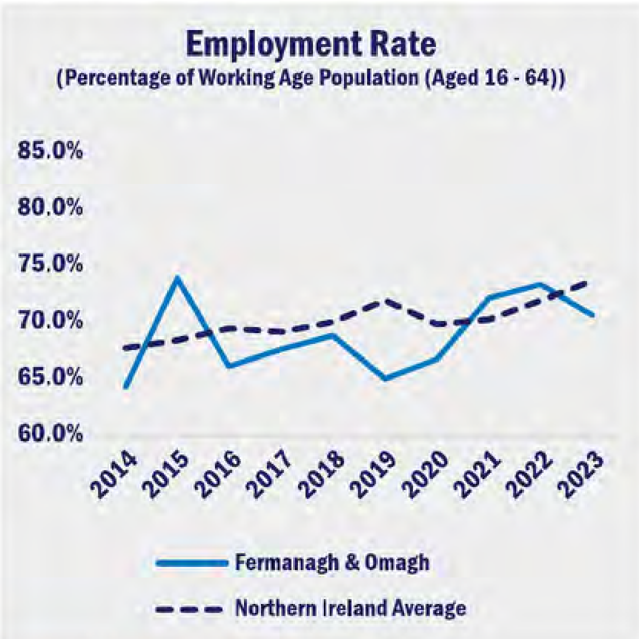
Good Jobs



Source: Labour Force Survey, NISRA

- **Maintain high level of Employees Earning above Real Living Wage** – In 2022 Fermanagh & Omagh had the fourth highest proportion of employees earning above the Real Living Wage at 86.0% (NI average is 85.5%).

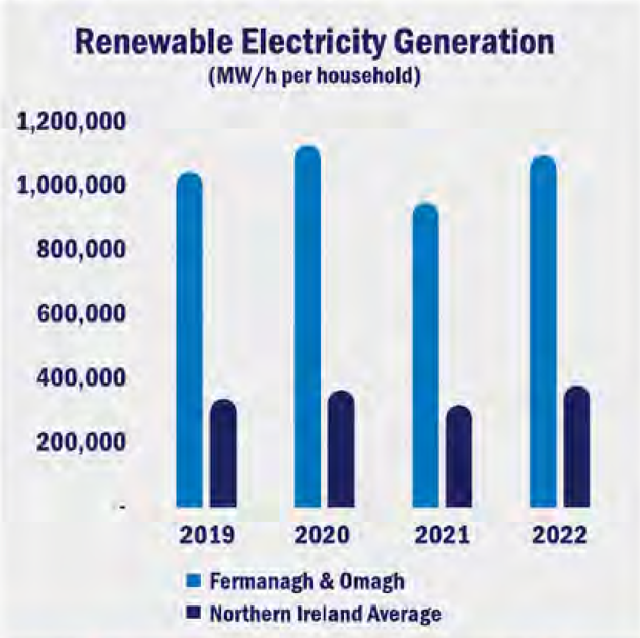
Regional Balance

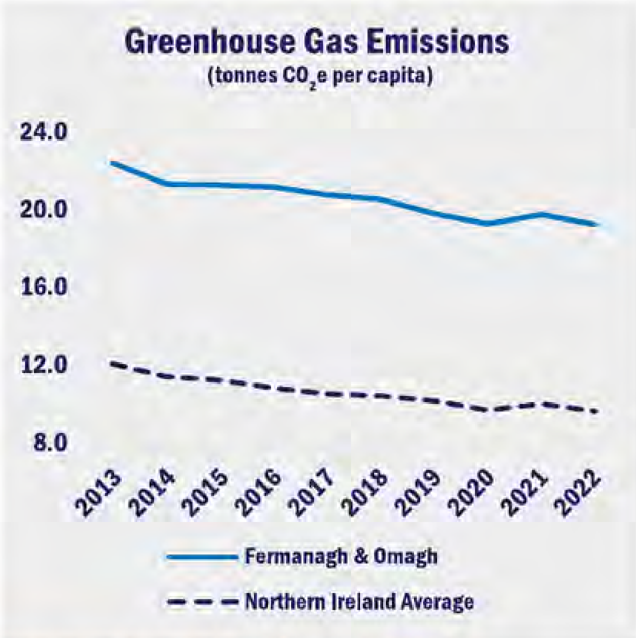


Source: Labour Force Survey, NISRA

- **Increase Employment** – Working age employment rates in Fermanagh and Omagh are lower than average (70.6% compared to 73.6%).
- **Increase Tertiary Education Attainment Level 4+** – In 2023, around 35.6% of the working age population had attained tertiary qualifications. This is the second lowest attainment rate of any LGD and 4.1pps lower than the regional average. Further improvement in the supply of skills would have positive implications for future productivity growth and in bringing labour market outcomes in the area more in line with the NI average.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Reduce CO2 Emissions per capita** - The area has the highest proportionate level of CO2 emissions in the North. In 2022, CO2 emissions per capita stood at 19.4 tonnes, about 1.6 times higher than the average for the North. Agricultural emissions account for a large proportion of total greenhouse gas emissions in the area and emissions from this industry have generally remained stable or increased slightly since 2005 across most LGDs.
- **Build on Renewable Electricity Generation** - Fermanagh and Omagh is the largest contributor to renewable electricity generation in the North. The region generated around 24.4 MW/h per household, about 32% more than the next best performing LGD.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
GINI Coefficient	11	0.35	0.30
Proportion of Working Age Population with No Qualifications	5	12.3%	14.0%

Source: Family Resources Survey, DfC/ Labour Force Survey, NISRA

- Household income inequality is low in the North by international standards and most LGDs have a GINI coefficient value between 0.29 and 0.31. Fermanagh and Omagh is the exception to this, with a value of 0.35 in 2018/19 to 2020/21. Household income inequality is therefore higher in Fermanagh and Omagh than any other LGD.
- The proportion of the working age population with no qualifications is higher in Fermanagh and Omagh than average. In 2023, 14.0% of the working age population had no qualifications compared to 12.3% for NI as a whole.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 8,575 – 11% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 94%
- Small business (10-49 employees) 5%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.1%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	7.6%	8.3%	Lower 0.7%
Business Survival Rates – 1 year	91 %	90%	Higher 1%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

The council Draft Inclusive Economy Action Plan 24-29 stated: key sectors – agri-food, tourism, and hospitality.

Biggest sectors by number of companies in council area (Broad Industry Groups)[21]

- Agriculture
- Construction
- Retail
- Production

Lowest sectors by number of companies in council area (Broad Industry Groups)

- Education
- ICT
- Finance & Insurance
- Health

5. Assets

Provides an insight into some of the key area strengths

Transport • A4 strategic route to Belfast • A5 strategic route to Derry and Dublin • Enniskillen Airport	**Education** • Colleges: South West College (Engineering & Advanced Manufacturing Curriculum Hub) - Erne, Dungannon, Omagh and CAFRE Enniskillen Campus.
Tourism • Cuilcagh (Stairway to Heaven) • Marble Arch Caves • Lough Erne • Sperrins • Necarne Castle • Gortin Glen • Ulster American Folk Park • National Trust properties	**Retail** • Retail clusters in Enniskillen and Omagh
Cross-border opportunities • Irish Central Border Area Network (ICBAN) • Route to west of Ireland	**Energy** • Renewable energy potential

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
44,264	6%	4th Lowest	13,420 (30%)	30,844(70%)

Source: Business Register and Employment Survey, NISRA

21 Inter-departmental Business Register (IDBR), NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Wholesale and Retail	8,210	18.5%	16.1%	Higher 2.5%
Human Health and Social Work Activities	8,049	18.2%	16.9%	Higher 1.3%
Manufacturing	6,329	14.3%	11.1%	Higher 3.2%
Education	5,343	12.1%	9.9%	Higher 2.2%
Construction	3,181	7.2%	4.8%	Higher 2.4%
Accommodation and Food Service	2,918	6.6%	6.6%	Equal
Public Administration and Defence; Compulsory Social Security	2,334	5.3%	6.4%	Lower 1.2%
Transport and Storage	1,479	3.3%	3.8%	Lower 0.5%
Professional Scientific and Technical	1,366	3.1%	5.2%	Lower 2.1%
Administrative and Support Service activities	972	2.2%	6.7%	Lower 4.5%
Arts, Entertainment and Leisure	804	1.8%	2.0%	Lower 0.2%
Information and Communication	725	1.6%	3.3%	Lower 1.7%
Financial services and insurance	615	1.4%	2.4%	Lower 1.0%
Water Supply, Sewerage and Waste Management / Remediation	559	1.3%	1.0%	Higher 0.3%
Other services activities	445	1.0%	1.8%	Lower 0.8%
Real Estate	380	0.9%	1.3%	Lower 0.4%
Mining and Quarrying	266	0.6%	0.2%	Higher 0.4%
Agriculture, Forestry and Fishing	198	0.4%	0.1%	Higher 0.3%
Electricity, Gas, Steam and Air Conditioning Supply	93	0.2%	0.3%	Lower 0.1%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector: Wholesale and Retail

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[22]

Provides an insight into investment activity by Invest NI supported companies

- Crust and Crumb (Northern Ireland)
- Naturelle Consumer Products (Northern Ireland)
- Elite Electronic Systems (Great Britain)
- Greentown Environmental (Northern Ireland)
- Gourmet Bros (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

22 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

Estimated investment in excess of £100m across the following projects:

- **Cuilcagh Lakelands Geopark** – A landscape wide tourism development proposition that can build on the opportunities arising from targeted infrastructural development across the Cuilcagh Lakelands UNESCO Global Geopark.
- **Innovation Programme** – Innovation pot across Mid-South West Growth Deal.

DfC

- Ulster American Folk Park

DfI

- A4 Enniskillen Southern bypass

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Council Draft Inclusive Economy Action Plan 2024-2029 states the economic priority "To drive an inclusive economy and aid prosperity across our district".

"By 2028 we will have more inclusive, greener, & more prosperous economy that benefits people, business, and places across our district." Three strategic themes were created in order to help achieve this priority:

Driving Sustainable Growth and Innovation

- Fully leverage Fermanagh & Omagh District Council share of the Mid-South West Growth Deal
- Support Fermanagh & Omagh District Council business growth
- Support increased Fermanagh & Omagh District Council business productivity and innovation to close the District's productivity gap
- Accelerate the transition to Net Zero
- Build greater social value

Building a place for sustainable business

- Campaign for critical infrastructure investment
- Create capacity for economic growth through the provision of industrial land and enterprise space
- Support the sustainable development of the region
- Support town and rural community renewal
- Promote the Fermanagh and Omagh district as a great place for business and to live/work

Developing an inclusive skilled workforce

- Promote an industry-led skills agenda
- Work to support inclusive skills development
- Foster greater diversity in the workplace
- Develop world-class strategic business leadership in the district
- Address the District's emerging skills gaps

Labour Market Partnership priorities

Improve employability outcomes and/or labour market conditions locally: Develop & deliver: A 'Gamified' Essential Skills learning programme, A Transport academy, Sectoral Employment academies, A Female Entrepreneur programme, A registered Childminder Training academy, An employer-led Disability Employment programme.

Promote and support delivery of existing employability or skills provision available either regionally or locally: Online Apprenticeship Brokerage programme and Mini Jobs Fairs.

Community Planning Partnership priorities

Tackling Poverty and Disadvantage
Green Recovery
Develop and deliver a 'Tourism and Economic Recovery Plan' - Provide mentoring and training to support SME's, including social enterprise, to return to trading so that employment opportunities can be sustained and to encourage growth, Progress workforce development to enhance skills and grow the talent pipeline for continued economic growth, Support for Tourism business

3.8 Lisburn and Castlereagh City Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 149,900 (7.8% of total NI population)[23]
- Working age population (16-64) – 92,600 (61.7% of Lisburn & Castlereagh Total population)
- Employment rate – 77.5%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	4	54,675	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	7=	0.8%	1.5%
Business Birth Rate (of active businesses, 2022)	5	8.4%	8.3%
FDI - New Jobs (% total, 2015-22)	3	4.6%	
Export Intensity (exports as % of all sales, 2022)	9	14%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	4	9.8%	9.2%

23 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	5	£508.30	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	1	88.5%	85.5%
Employees in Secure Employment (2021-22)	7	95%	95.6%

Regional Balance

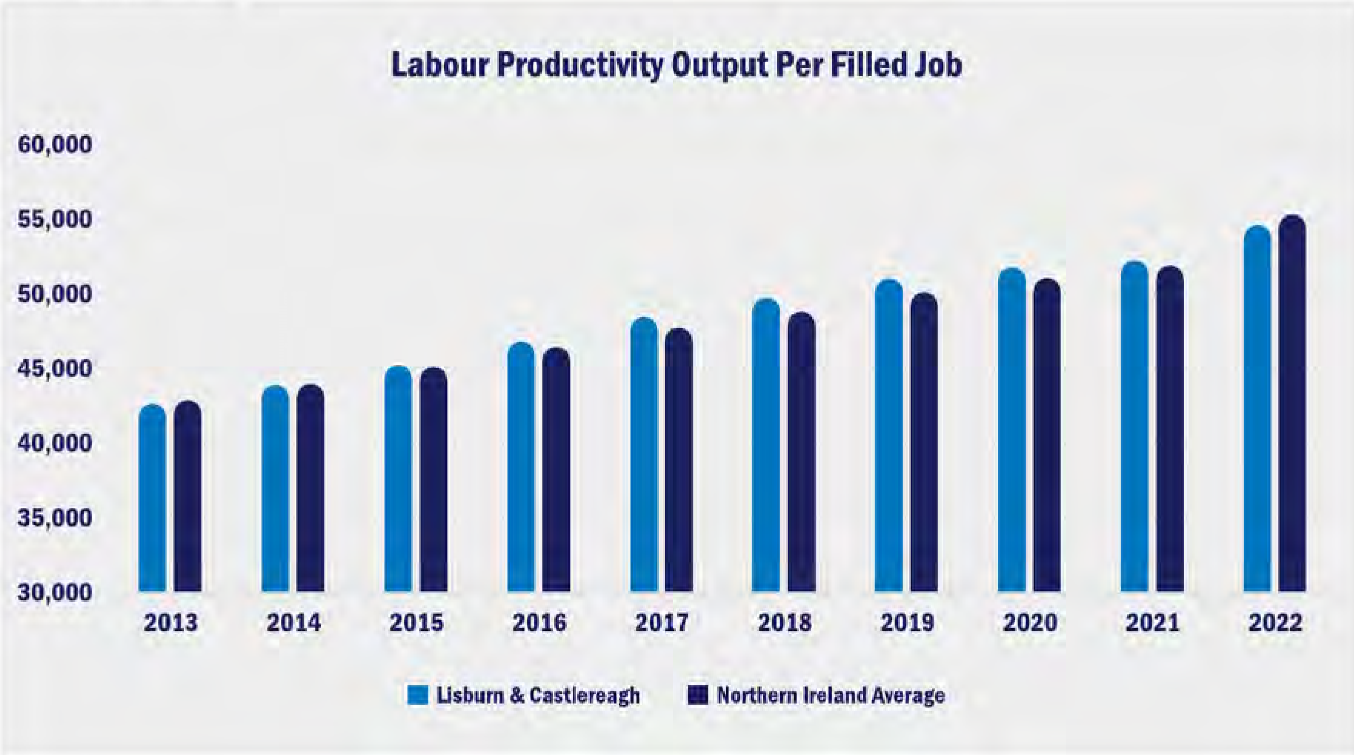
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	4	77.8%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	5	21.7%	24.7%
Gross Domestic Household Income (per head, 2021)	1	£19,223	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	1	50.1%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	4	8.1	9.8
Renewable Electricity Generation (MW/h per household, 2022)	6	2.8	5.6

Performance against Economic Vision core metrics

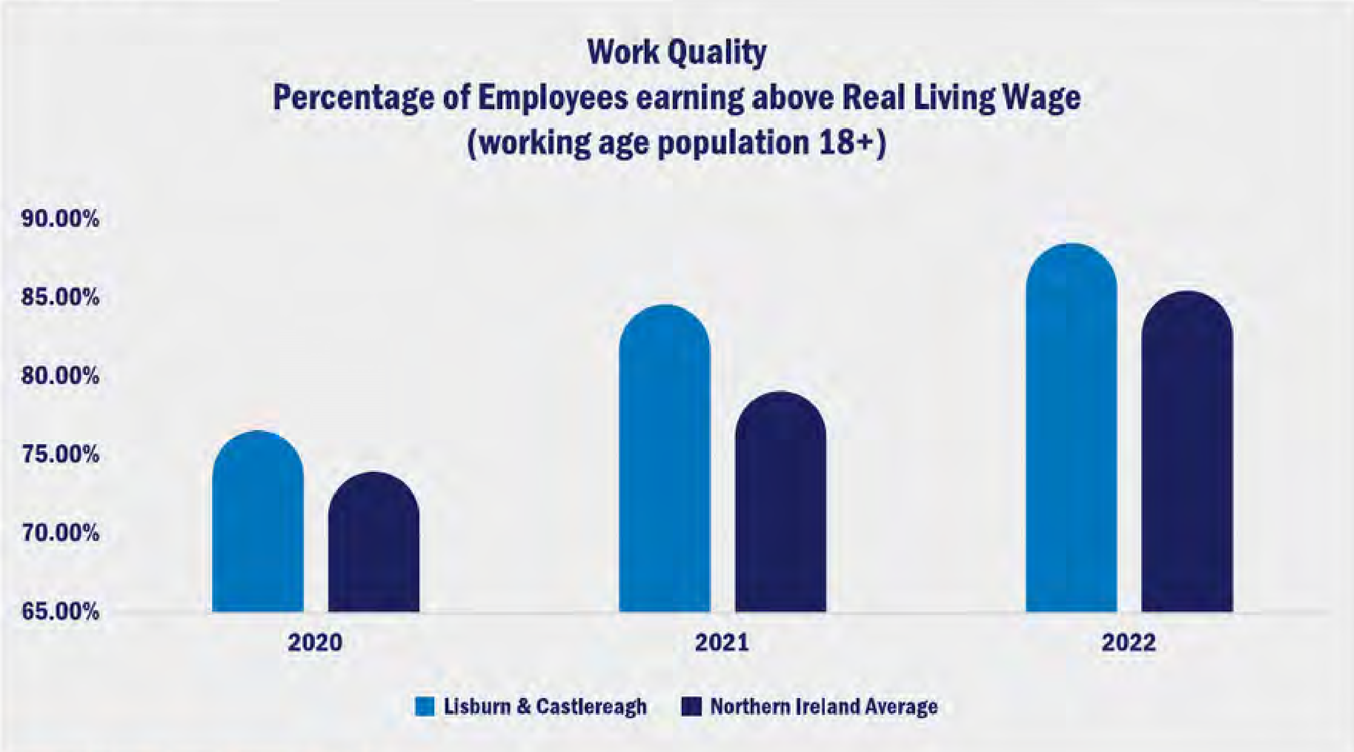
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase BERD Intensity** – BERD Intensity (R&D spending by businesses as a proportion of output) is relatively low in the area; 0.8% compared to NI average of 1.5%. This is particularly notable considering that three LGDs that neighbour the area have business R&D intensities in excess of 2%.
- **Build on Total Early-Stage Entrepreneurship Activity Rate** – Early stage entrepreneurial activity in the area is higher than average (9.8% compared to 9.2%). Nevertheless, there is scope for supporting entrepreneurial activity and new business creation in the area.

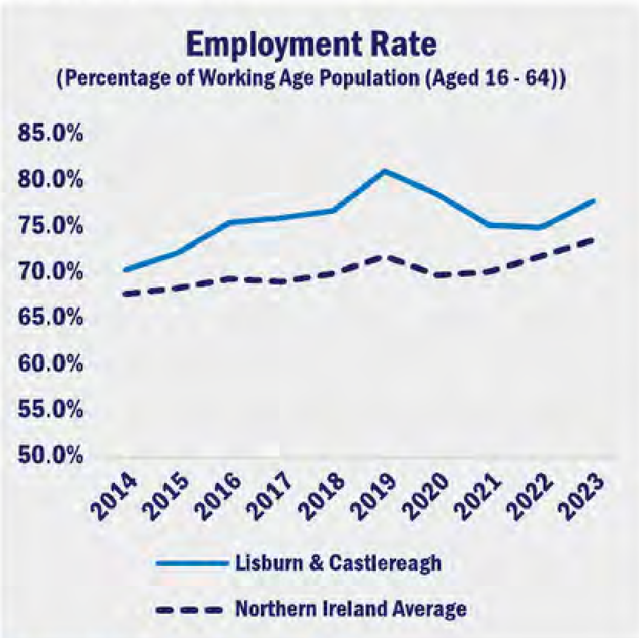
Good Jobs

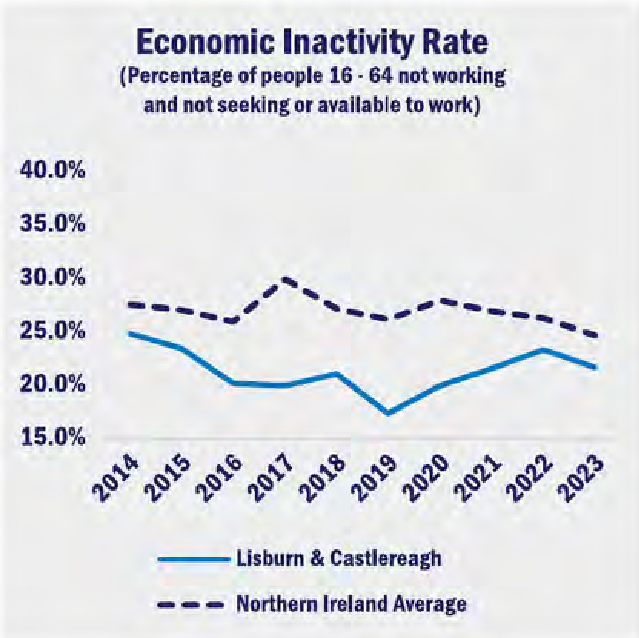


Source: Labour Force Survey NISRA

- **Maintain high level of Employees Earning above Real Living Wage** – In 2022 Lisburn and Castlereagh had the highest proportion of employees earning above the Real Living Wage at 88.5% (NI average is 85.5%).

Regional Balance

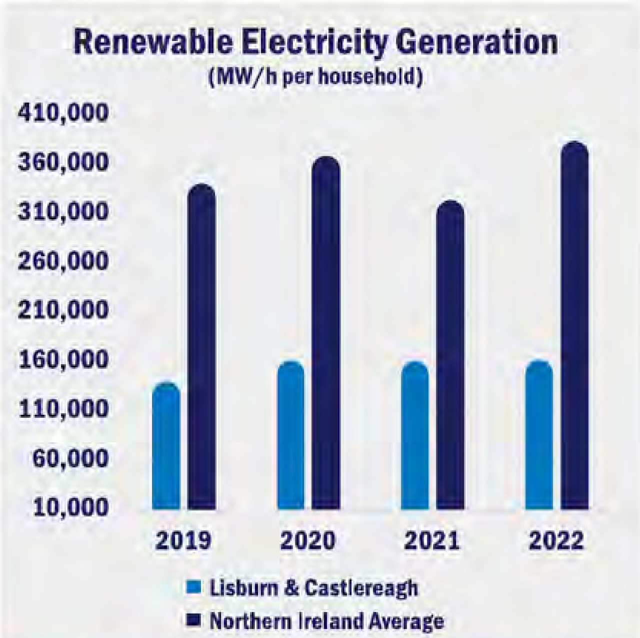


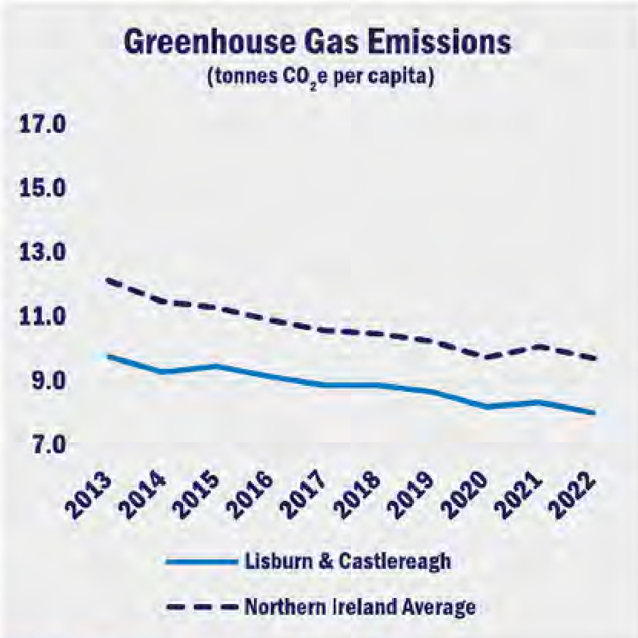


Source: Labour Force Survey, NISRA

- **Maintain high level of Tertiary Education Attainment L4+** – Lisburn and Castlereagh has the highest proportion of working age population with tertiary qualifications in NI. In 2023, around half (50.1%) of people aged 16 to 64 were qualified to RQF Level 4. This is nearly 11pps higher than NI average and almost 16pps higher than the lowest performing LGD.
- **Maintain high level of GDHI** – In 2021, Gross Disposable Household Income per head in Lisburn and Castlereagh was £19,223. This was the highest of any LGD and around 9.0% higher than the NI average. The area has one of the largest differentials in median wages between those who live in the area and those that work in it. This reflects the status of the area as a major source of commuters into Belfast.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Increase Renewable Electricity Generation** - Lisburn & Castlereagh has room to increase Renewable Electricity Generation with 2.8 MW/h per household. This has only increased 0.4MW/h since 2019. The highest level was 24.4 MW/h per household in Fermanagh and Omagh.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Gender Wage Gap	1	-1.0%	8.7%
Male Inactivity Rate	7	18.0%	21.2%
% of Employees Reporting Opportunities for Career Progression	8	55.5%	58.3%

Source: Annual Survey of Hours and Earnings (ASHE, NISRA/ Labour Force Survey (LFS), NISRA

- The area performs relatively well across some measures of equality and inclusion. As of 2022, Lisburn and Castlereagh is one of only two LGDs in the North where the median hourly wage for women exceeds that for men (£14.0 for women compared to £13.79 for men). Lisburn and Castlereagh underperforms against the NI average on several indicators of work quality. In 2022, 55.5% of employees aged 18 and over reported opportunities for career progression, compared to a regional average of 58.3%. The area also has a slightly lower incidence of reported secure employment (95.0% vs NI average of 95.6%).
- Relative to its performance on other labour market indicators, the area has a slightly higher rate of male economic inactivity (18.0%) than is typical for its surrounding regions but is still lower than the NI average (21.2%).

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 5,240 – 7% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 88%
- Small business (10-49 employees) 10%
- Medium business (50-249 employees) 2%
- Large Business (250+ employees) 0.5%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	8.4%	8.3%	Higher 0.1%
Business Survival Rates – 1 year	88%	90%	Lower 2%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Biggest sectors by number of companies in council area (Broad Industry Groups)[24]

- Construction
- Agriculture
- Professional, Scientific & Technical
- Production

Lowest sectors by number of companies in council area (Broad Industry Groups)

- Education
- Finance & Insurance
- Property
- Health

5. Assets

Provides an insight into some of the key area strengths

Transport • A1 and M1 transport corridors • Rail and bus connections to Belfast and Dublin • Proximity to key transport: 1. Belfast International Airport 14 miles from Lisburn 2. Belfast City Airport 12 miles from Lisburn 3. Belfast Harbour 10 miles from Lisburn	**Education** • Colleges: South Eastern Regional College • Construction Curriculum Hub – Lisburn campus
Tourism • Royal Hillsborough & Historic Moira • Irish Linen Museum • Lagan Valley Regional Park • Hilden Brewery and Hinch Distillery • Numerous golf courses across the area	**Retail** • Large retail clusters at Forestside, Lisburn City and Sprucefield
Maze Long Kesh • 347 acres strategically located site (adjacent to M1) with potential for regeneration and economic development.	

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
62,743	8%	Joint 3rd highest	21,873 (35%)	40,870(65%)

Source: Business Register and Employment Survey, NISRA

24 Inter-departmental Business Register (IDBR), NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Human Health and Social Work Activities	14,337	22.8%	16.9%	Higher 5.9%
Wholesale and Retail	11,472	18.3%	16.1%	Higher 2.2%
Education	6,580	10.5%	9.9%	Higher 0.6%
Manufacturing	5,504	8.8%	11.1%	Lower 2.3%
Administrative and Support Service activities	4,326	6.9%	6.7%	Higher 0.2%
Public Administration and Defence; Compulsory Social Security	4,211	6.7%	6.4%	Higher 0.3%
Construction	3,802	6.1%	4.8%	Higher 1.3%
Accommodation and Food Service	3,514	5.6%	6.6%	Lower 1.0%
Professional Scientific and Technical	2,354	3.8%	5.2%	Lower 1.5%
Arts, Entertainment and Leisure	1,401	2.2%	2.0%	Higher 0.3%
Transport and Storage	1,265	2.0%	3.8%	Lower 1.8%
Other services activities	1,199	1.9%	1.8%	Higher 0.1%
Information and Communication	905	1.4%	3.3%	Lower 1.9%
Financial services and insurance	708	1.1%	2.4%	Lower 1.3%
Water Supply, Sewerage and Waste Management / Remediation	453	0.7%	1.0%	Lower 0.2%
Real Estate	425	0.7%	1.3%	Lower 0.6%
Electricity, Gas, Steam and Air Conditioning Supply	181	0.3%	0.3%	Equal
Mining and Quarrying	73	0.1%	0.2%	Lower 0.1%
Agriculture, Forestry and Fishing	34	0.1%	0.1%	Lower 0.1%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector: Human Health and Social Work Activities

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[25]

Provides an insight into investment activity by Invest NI supported companies

- Hinch Distillery (Northern Ireland)
- Datum Tool Design (Northern Ireland)
- Camlin (Northern Ireland)
- Smiley Monroe (Northern Ireland)
- Causeway Aero (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

25 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

- **Destination Royal Hillsborough, £26m** – establish Royal Hillsborough as a high quality, leading visitor destination and experience while also regenerating the village with an enhanced, sustainable culture and heritage offer.

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 council regions in the Belfast Region City Deal.

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans

Corporate Plan & Ambitions 2024-2028:

- Promote an ambitious investment programme, prioritising key projects including digital infrastructure, smart technology, and solutions to attract new employers and grow the prosperity of the Council area.
- Engage with local, regional, national, and international organisations, businesses, social enterprises, and partners to access funding opportunities, increase employment, and drive sustainable economic growth in urban and rural areas. This includes a focus on the Belfast Regional City Deal (BRCD), the Dublin-Belfast Economic Corridor (DBEC) partnerships and the UK Prosperity Fund.
- Help education and training providers to equip local workforce with the right skills to secure employment or start a business.
- Build on our reputation as a place to visit, promoting the natural and historic assets of the city as well as those of Destination Royal Hillsborough and other towns, villages, and the countryside. This will help attract greater numbers of international and national tourists, thereby building the economy.
- Continue capital investment in facilities including the redevelopment of Dundonald International Ice Bowl.
- Work with partners to make optimum use of land and capital assets.

Dublin-Belfast Economic Corridor:

- Skills: analyse the corridor's workforce and publish snapshots of insights, develop a clear skills policy and strategy specific to the corridor, become active in skills development in priority sectors.
- Infrastructure: identify infrastructure gaps and map assets with development potential, develop business cases for relevant infrastructure projects.
- Research & Development: Grow DBEC's profile within the R&D community and support relationship building, secure funding for innovation hubs along the corridor, explore the potential for developing a circular economy approach along DBEC.

- Ways of working: Be an active player in the corridor's ecosystem through activities, workshops, and events. Resource the partnership with skilled staff and provide capacity to continue to grow. Complement member councils' seed and ongoing funding with external sources. Develop a clear marketing strategy and actively engage with stakeholder groups.

Community Planning Partnership targets

- Develop a programme to identify and support people with Level 1 and 2 qualifications to achieve Level 3 and above.
- Prepare for the opening of Hillsborough Castle to attract visitors to a range of historic and natural attractions in Lisburn & Castlereagh.
- Deliver the 'NI Business Start Up Programme' to support new business starts.
- Develop opportunities for new social enterprises based on green spaces and health for the benefit of young people.
- Develop key infrastructure projects including the Knockmore-M1 link and Maze Long Kesh.
- Explore the use of social clauses and local sourcing in contracts issued by community planning partners to support the Community Plan's outcomes.
- Improve access to and quality of digital infrastructure across the area.
- Implement a programme of home energy insulation to reduce fuel poverty.
- Develop and implement home and business energy efficiency and renewable energy measures

Labour Market Partnership priorities

The following themes have been identified as local priority:

- Economic Inactivity: Into Employment programme, Self- Employment Options for Prison Leavers Support programme, Female Returners programme – Classroom Assistants (Strand 1)
- Disability - Pathways to Employment for Individuals with a Disability
- Skilled Labour Supply: Sector-Focused Employability academies, Female Returners programme – Classroom Assistants (Strand 2), Self- Employment Options Support programme

3.9 Mid and East Antrim Borough Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 139,200 (7.3% of total NI population)[26]
- Working age population (16-64) – 85,500 (61.4% of Mid & East Antrim Total population)
- Employment rate – 79.5%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	5	£53,189	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	10=	0.5%	1.5%
Business Birth Rate (of active businesses, 2022)	6	8.3%	8.3%
FDI - New Jobs (% total, 2015-22)	6	0.7%	
Export Intensity (exports as % of all sales, 2022)	5=	18%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	5	9.7%	9.2%

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	8	£487.30	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	3	87.7%	85.5%
Employees in Secure Employment (2021-22)	1	98.2%	95.6%

26 Mid-Year Population Estimates by LGD, NISRA

Regional Balance

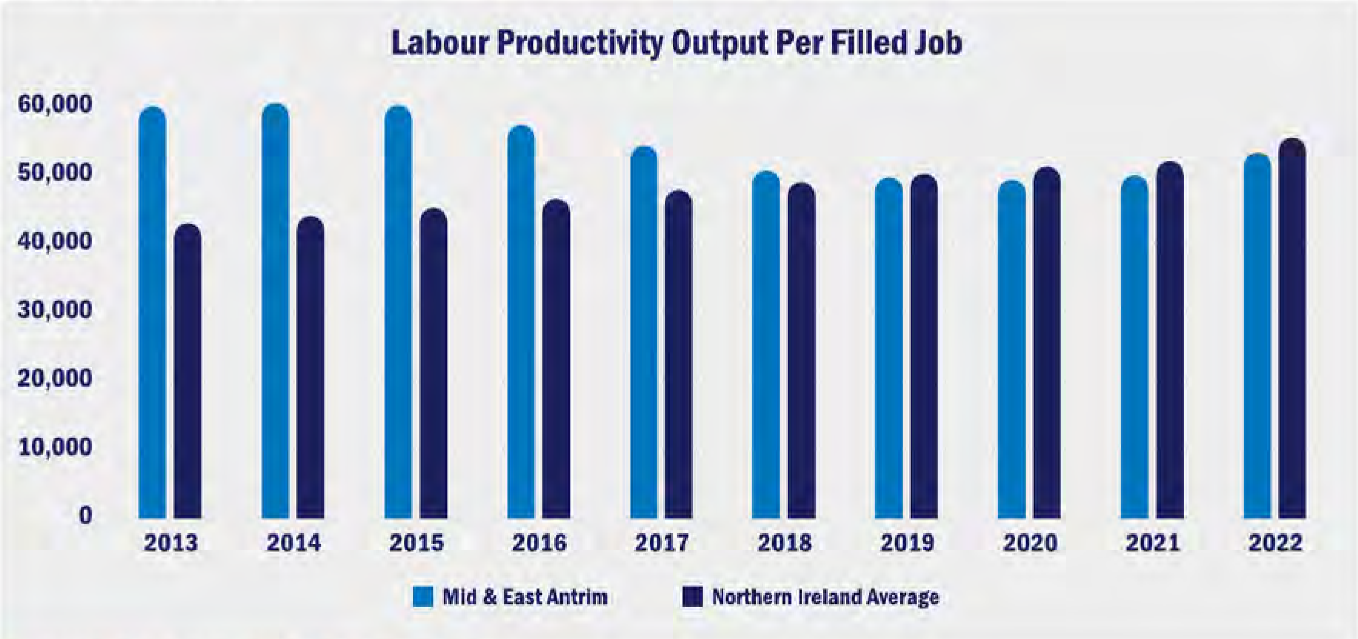
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	1	79.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	1	19.3%	24.7%
Gross Domestic Household Income (per head, 2021)	4	£17,767	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	11	34.2%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	6	9.9	9.8
Renewable Electricity Generation (MW/h per household, 2022)	5	4.5	5.6

Performance against Economic Vision core metrics

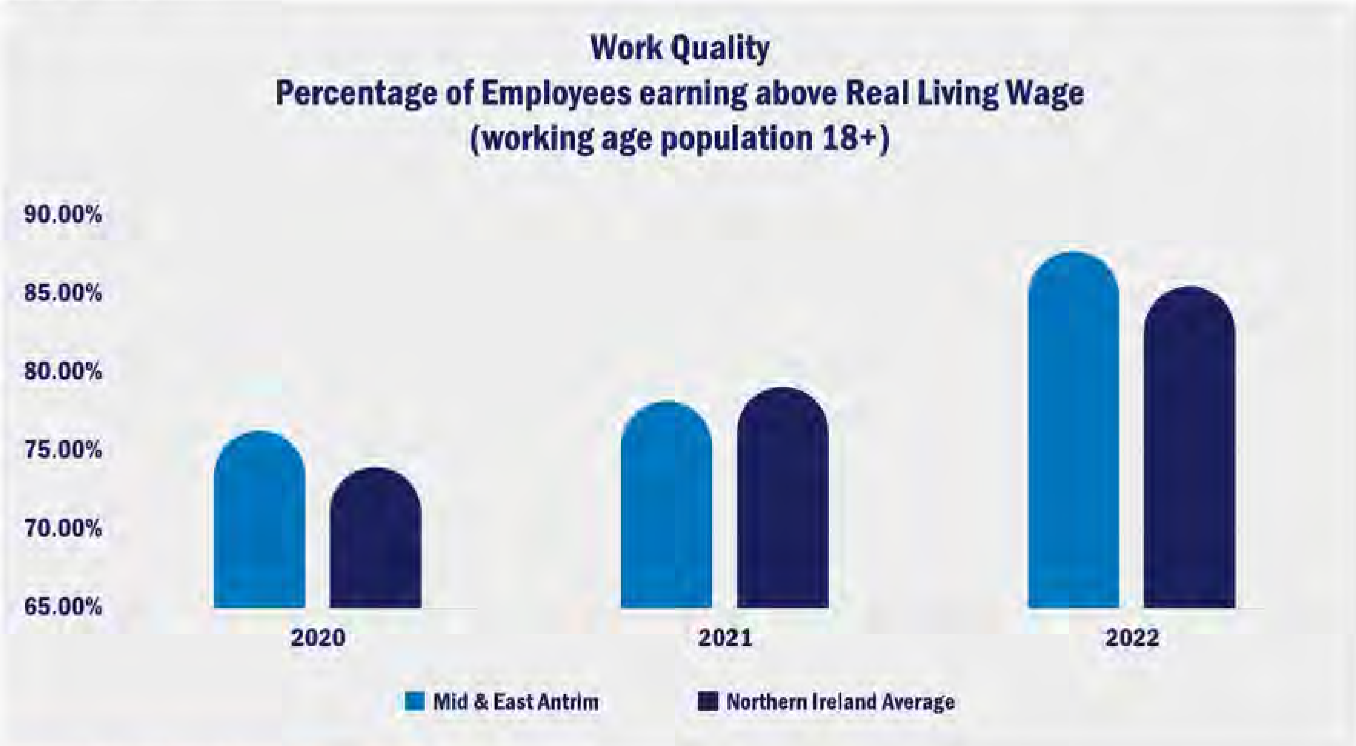
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase Productivity –** Prior to 2017, Mid and East Antrim had the highest rate of output per filled job (labour productivity) in NI. Average productivity in the area declined significantly as a result of the large industrial closures that occurred in the region in the latter half of the previous decade. Average productivity has yet to recover and as of 2022 is almost 4pps lower than the NI average.
- **Increase BERD Intensity –** Mid and East Antrim has the lowest BERD Intensity (R&D spending by businesses as a proportion of output) of all councils at 0.5%. This is notable considering the relatively high BERD intensity seen in neighbouring areas such as Mid Ulster (1.9%) and Antrim & Newtownabbey (2.0%). Low investment in research and development and lower than average incidence of advanced skills in the area may serve to constrain future recovery in areal productivity.
- **Increase Business Birth Rate –** The business birth rate in Mid and East Antrim equals the NI average figure as of 2022. Early-stage entrepreneurial activity is also slightly higher than average, although the rate has declined from the previous high points seen in the late 2010s.

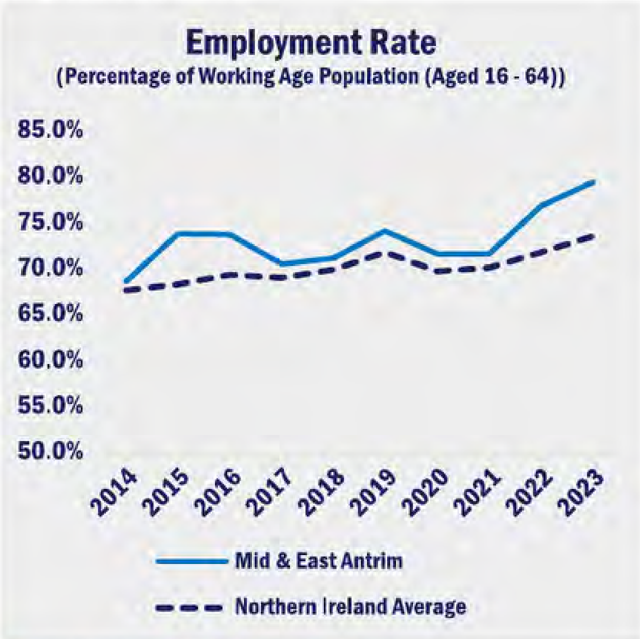
Good Jobs

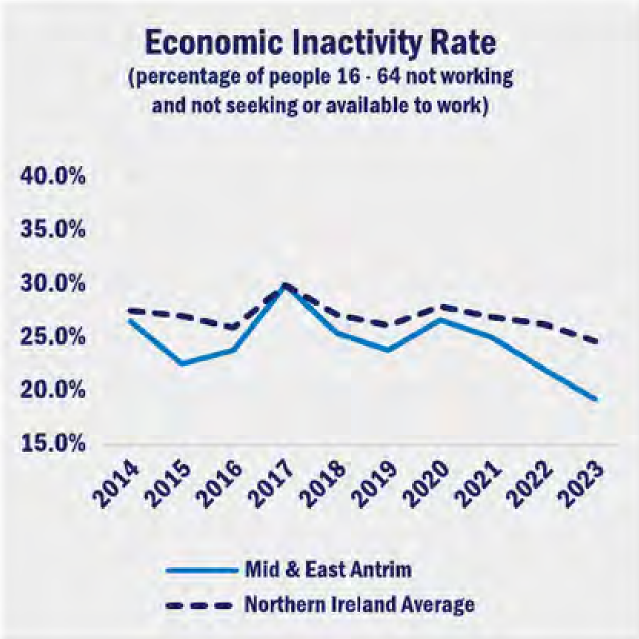


Source: Labour Force Survey, NISRA

- **Maintain Secure Employment strength –** In addition to high employment rates, the area also boasts the highest reported incidence of secure employment. In 2022, 98.2% of employees aged 18 or over reported being in secure employment – the highest of all council areas.

Regional Balance

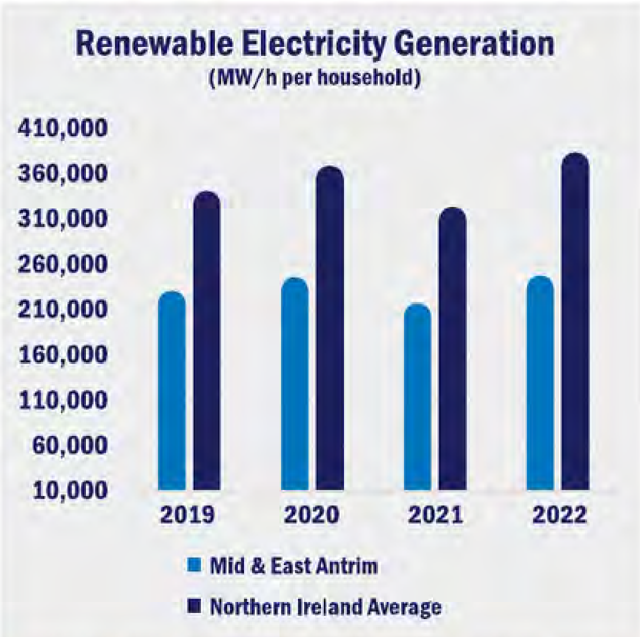


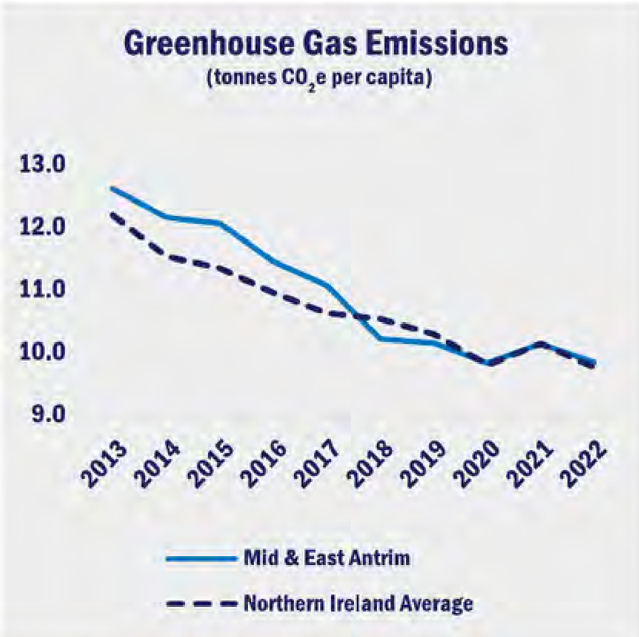


Source: Labour Force Survey, NISRA

- **Build on Economic Inactivity Strength –** Mid and East Antrim has the lowest economic inactivity rate of all NI councils, well below the NI average (19.3% compared to 24.7% in 2023).
- **Maintain Employment Rate** – In 2023, Mid and East Antrim had the highest employment rate in the North. At 79.5%, the employment rate in the area was nearly 6.0pps higher than the NI average.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Lower CO2 Emissions per Capita –** Emissions per capita are slightly higher than NI average (9.9tn/pc compared to 9.8tn/pc), and the council ranks 6th out of the 11 council areas in 2022.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Lifelong Learning (Male)	1	19.7%	14.4%
Lifelong Learning (Female)	1	29.2%	18.2%
Proportion of the working age population with no qualifications	9	14.1%	12.3%
% of Employees Reporting Opportunities for Career Progression	11	53.8%	58.3%
Gender Pay Gap	11	16.5%	8.7%

Source: Labour Force Survey NISRA/ Annual Population Survey, NISRA/ Annual Survey of Hours & Earnings, NISRA

- The area has the highest incidence of both males and females engaged in education and training. In 2022, 19.7% of males (aged 25-64) and 29.2% of females were engaged in some form of education or training. The rate of participation for women is particularly high, being 11pps higher the average for the north and over 9pps higher than the next best performing area. Mid and East Antrim has one of the highest proportions of the working age population with no qualifications. The area also has the lowest incidence of tertiary qualifications of any LGD.
- The area has the lowest proportion of employees reporting opportunities for career progression in their current employment. In 2022, 53.8% of employees (aged 18 and over) reported opportunities for career progression compared to a regional average of 58.3%.
- As of 2022, Mid and East Antrim has one of the largest gender pay gaps of any LGD in the North. The difference between male and female median hourly wages in the region was 12.3% compared to an NI average at 8.3%. This may be partly a function of relatively high female employment and participation rates in the region. If women that can command lower than average wages are more likely to select into paid employment in this area than elsewhere, this would have a downward effect on median hourly pay rates.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 5,065 – 6% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 91%
- Small business (10-49 employees) 8%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.3%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	8.3%	8.3%	Equal
Business Survival Rates – 1 year	88%	90%	Lower 2%

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Biggest sectors by number of companies in council area (Broad Industry Groups)[27]

- Agriculture
- Construction
- Retail
- Production

Lowest sectors by number of companies in council area (Broad Industry Groups)

- Education
- Finance & Insurance
- ICT
- Transport

5. Assets

Provides an insight into some of the key area strengths

Transport • Larne Port (Larne-Cairnryan) • A8/M2 transport corridor • Proximity to key transport: 1. Belfast International Airport 15 miles from Ballymena	**Education** • College: Northern Regional College (Entrepreneurship Curriculum Hub) – Ballymena campus (being redeveloped)
Tourism • Causeway Coastal Route • The Gobbins and Phase 2 (City Deal Project) • Carrickfergus Castle • Slemish • Glens of Antrim • Whitehead & Islandmagee • Numerous golf courses	**Retail** • Large retail clusters in Ballymena, Larne, and Carrickfergus
Energy • Renewable energy potential	

27 Inter-departmental Business Register (IDBR), NISRA

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Ranking across councils	Public Sector	Private Sector
42,758	5%	Lowest 3	11,141 (26%)	31,617 (74%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Wholesale and Retail	8,379	19.6%	16.1%	Higher 3.5%
Manufacturing	6,273	14.7%	11.1%	Higher 3.6%
Human Health and Social Work Activities	6,002	14.0%	16.9%	Lower 2.9%
Education	4,525	10.6%	9.9%	Higher 0.7%
Accommodation and Food Service	3,561	8.3%	6.6%	Higher 1.7%
Public Administration and Defence; Compulsory Social Security	2,416	5.7%	6.4%	Lower 0.8%
Construction	2,228	5.2%	4.8%	Higher 0.4%
Administrative and Support Service activities	2,196	5.1%	6.7%	Lower 1.6%
Transport and Storage	1,947	4.6%	3.8%	Higher 0.7%
Professional Scientific and Technical	1,162	2.7%	5.2%	Lower 2.5%
Other services activities	875	2.0%	1.8%	Higher 0.2%
Arts, Entertainment and Leisure	756	1.8%	2.0%	Lower 0.2%
Financial services and insurance	610	1.4%	2.4%	Lower 1.0%
Real Estate	577	1.3%	1.3%	Equal
Water Supply, Sewerage and Waste Management / Remediation	463	1.1%	1.0%	Higher 0.1%
Information and Communication	371	0.9%	3.3%	Lower 2.4%
Mining and Quarrying	197	0.5%	0.2%	Higher 0.3%
Electricity, Gas, Steam and Air Conditioning Supply	177	0.4%	0.3%	Higher 0.1%
Agriculture, Forestry and Fishing	43	0.1%	0.1%	Equal

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector: Wholesale and Retail

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[28]

Provides an insight into investment activity by Invest NI supported companies

- Moore Concrete Products (Northern Ireland)
- M Clarke & Sons Contracts (Northern Ireland)

28 Council Economic Profiles, Invest NI, March 2024

- Duneane Engineering (Northern Ireland)
- Ballymena Meats (Northern Ireland)
- Pollock Lifts (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

- **Gobbins Phase 2, £13m** - this exhilarating visitor attraction will be enhanced by the addition of a stunning staircase, an upgrade to the cliff top path – to include a new rope bridge that stretches across the coastline – and the development of a new Welcome Hub which will include augmented reality experiences.
- **I4C Cleantech Centre, £24.1m** - involves the construction of a new, significant scale innovation and clean technology centre for SMEs with iLAB Makerspace and Grade A offices.
- **HyTechNI, £15m complementary fund contribution** – Combined Hydrogen Centre – The proposal will support commercial testbeds including shared equipment to drive efficiencies between H2H Hydrogen Hub, AMIC and I4C.

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 council regions in the Belfast Region City Deal.

DfC

- Carrickfergus regeneration, £40m

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans.

Mid & East Antrim Corporate Plan 2024-2028

- Work in partnership with employers and stakeholders to support those seeking employment, provide upskilling support, improve access to the labour market for those with disabilities, and promote skills pathways.
- Promote the benefits of offering apprenticeships and work experience opportunities to enhance skills development and bridge the gap between education and employment.
- Support the development of a sustainable, dynamic, and prosperous local economy that helps businesses to grow, and promote the borough as an ideal place to do business for both new and existing companies.
- Help drive sustainable economic growth by promoting the borough as a leading visitor and cultural destination, utilising our natural, and built, heritage and assets.
- Support towns and villages to help regenerate and stimulate economic activity, while protecting and conserving our natural and historic landscape.

Labour Market Partnership priorities

- **Strategic Priority: To improve employability outcomes and/or labour market conditions locally** - Employment/Skills Academies e.g., Transport Academy, Hospitality/Tourism Academy, Female Advanced Manufacturing Skills Academy, Fibre Skills Academy, Improving Clean Tech Hub
- Reversing the negative impact COVID has on the economically inactive - MEA Enterprise Pathway, Women Returners Programme
- **To support delivery of Employability NI** - Increased awareness of employability and skills programmes and career pathways, e.g. NI Apprenticeship Week (NIAW) 2023, Hospitality Takeover Days, Clean Tech Takeover Day

Community Planning Partnership priorities

- **Sustainable Jobs and Tourism**: Enterprise, entrepreneurship and innovation, Employment and skills, Raising our tourism potential, Infrastructure, Inclusion and wellbeing
- **Good Health and Wellbeing**: Prevention and early intervention, Health and work, Healthy places and lifestyles, Deprivation and health, Responding to an ageing society
- **Progress in Education**: Qualifications of the working age population, Inequalities in education, Delivering the skills for future economic development
- **Community Safety and Cohesion**: Those most at risk of creating crime, Vulnerable people, Vulnerable places
- **Our Environment**: Assets, Attitudes, Access

3.10 Mid Ulster District Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 151,000 (7.9% of total NI population)[29]
- Working age population (16-64) – 93,100 (61.6% of Total Mid Ulster population)
- Employment Rate 73.6%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	2	£58,702	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	4	1.9%	1.5%
Business Birth Rate (of active businesses, 2022)	11	6.8%	8.3%
FDI - New Jobs (% total, 2015-22)	9=	0.2%	
Export Intensity (exports as % of all sales, 2022)	5=	18%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	6	8.5%	9.2%

29 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	4	£510.80	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	8	84.3%	85.5%
Employees in Secure Employment (2021-22)	3	97.0%	95.6%

Regional Balance

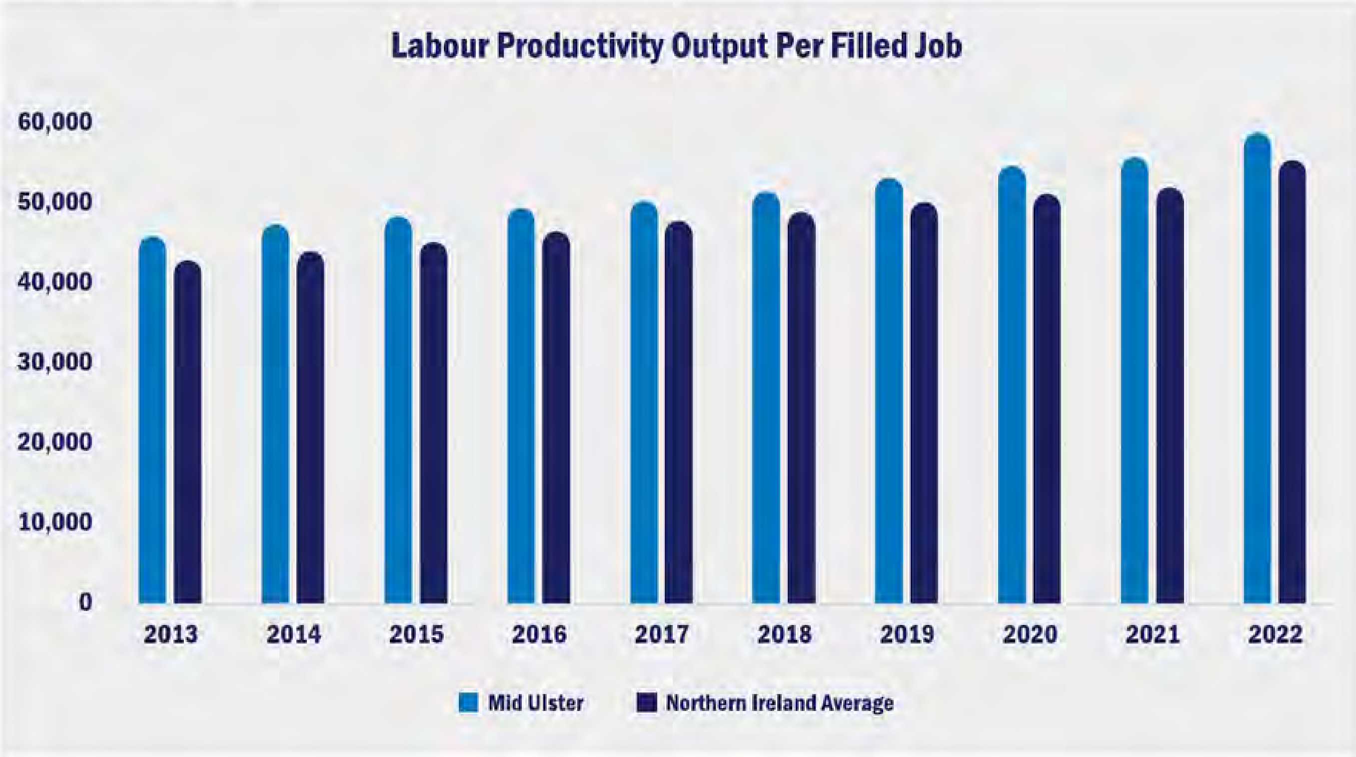
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	7	74.9%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	6	23.3%	24.7%
Gross Domestic Household Income (per head, 2021)	6	£17,495	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	5	40.1%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	10	15.5	9.8
Renewable Electricity Generation (MW/h per household, 2022)	4	6.1	5.6

Performance against Economic Vision core metrics

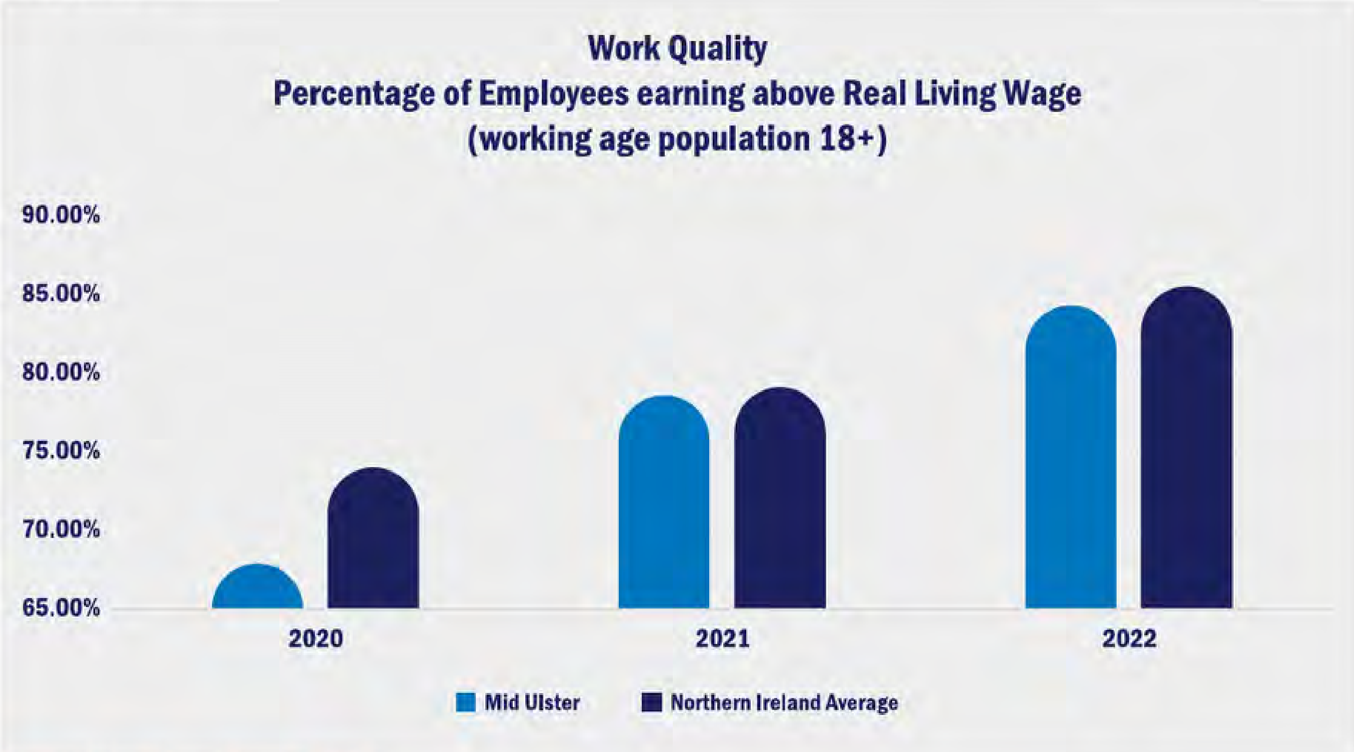
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Build on Labour Productivity** – In 2022, Mid Ulster had the second highest output per filled job in NI (£58,702) compared with the NI average of £55,364. Mid Ulster is also one of only two LGDs in the north where productivity is comparable to UK average levels (the other being Belfast).
- **Increase Business Birth Rate** - As of 2022, Mid Ulster had the lowest rate of business births of any LGD. This was 6.8% compared to an NI average of 8.3% with the highest rate being Derry City & Strabane at 9.2%.
- **Increase FDI New Jobs** – Mid Ulster has one of the lowest FDI New Job shares in NI at 0.2% (ranked 9th). It should be noted that this figure is low amongst many councils outside Belfast which has the highest share at 78%.
- **Build on BERD Intensity** – At 1.9%, the business R&D intensity in the region is among the highest in NI (NI average of 1.5%). Historically, Mid Ulster has consistently had a higher business R&D intensity than the NI average.

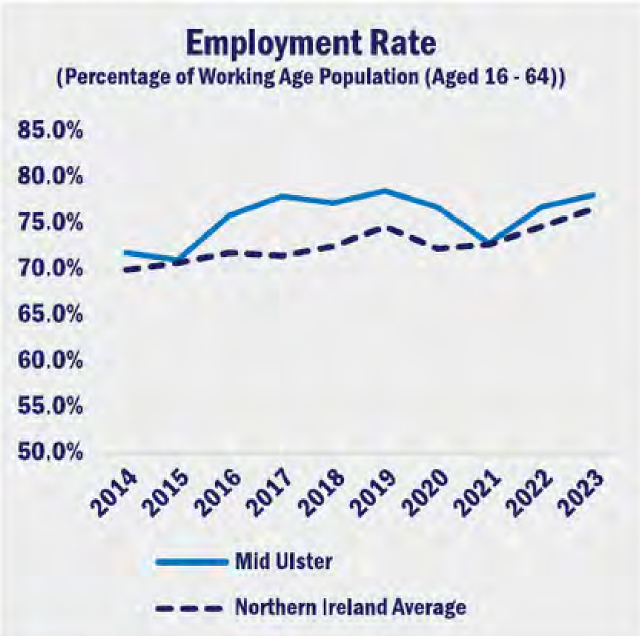
Good Jobs

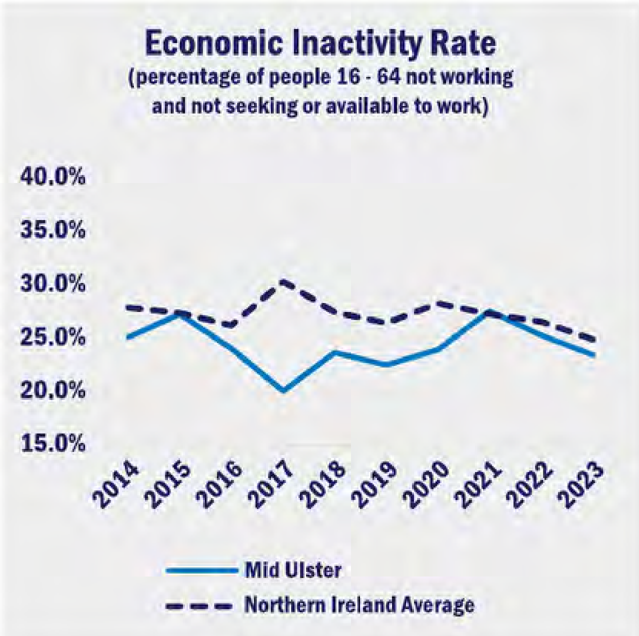


Source: Labour Force Survey, NISRA

- **Build on Secure Employment strength** - Mid Ulster has one of the highest incidences of reported job security by current employees. In 2022, 97.0% of employees (18 and over) reported being in secure employment.

Regional Balance

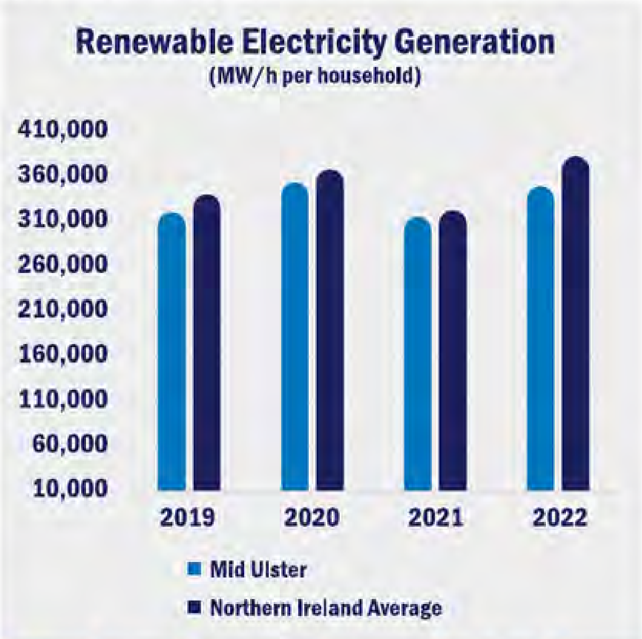


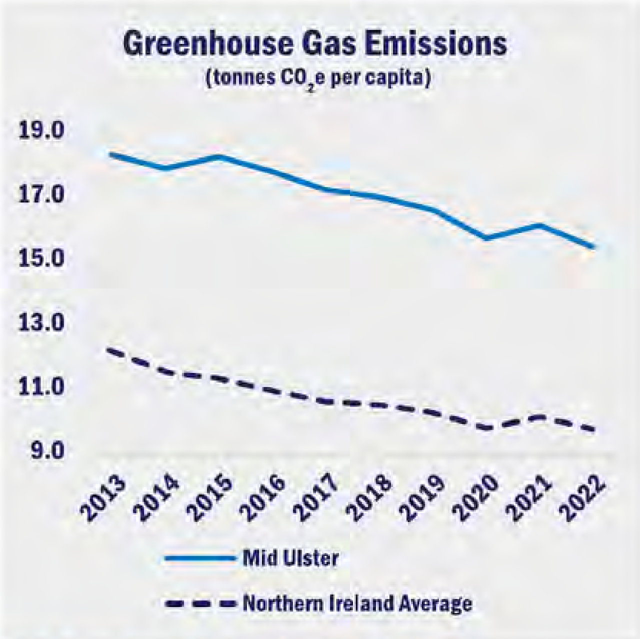


Source: Labour Force Survey, NISRA

- **Increase Tertiary Educational Attainment Level 4+ Rates** – in 2023, the proportion of those aged 16 to 64 with RQF Level 4 qualifications and higher was 40.1%, the fifth highest among all LGDs (regional average of 39.7%).

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

Decrease CO2 Emissions – Mid Ulster has the second highest Greenhouse Gas Emissions (CO2 equivalent basis) per capita of all council areas and is significantly higher than the NI average (15.5 tn/pc compared to 9.8tn/pc).

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
GINI Coefficient	1	0.28	0.30
Gender Pay Gap	10	15.9%	8.7%
Lifelong Learning (Male)	11	6.8%	14.4%

Source: Family Resources Survey, DfC/ Annual Survey of Hours and Earnings, NISRA/ Labour Force Survey, NISRA

- Economic inactivity rates for males are among the lowest in the north, at 16.7%, around 4.5pps lower than the NI average. The economic inactivity rate for women is slightly higher than average, however (30.2% compared to 28.2%).
- The area has one of the lowest proportions of the working age population with no qualifications of any LGD AT 8.9% (third lowest in NI).
- After adjustment for housing costs, household income inequality is lower Mid Ulster than in any other LGD. The after-housing costs GINI coefficient value for the north as a whole was 0.30 over the period 2018/19 to 2021/22, compared to 0.28 in Mid Ulster.

- The proportion of males (aged 25 to 64) engaged in education or training in Mid Ulster is the lowest of any LGD and less than half of the average for the north (6.8% compared to 14.4%). Female participation in education and training is somewhat higher however, at 16.8% compared to the regional average of 18.2%.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 9,540 – 12% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 92%
- Small business (10-49 employees) 6%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.3%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate (2022)	6.8%	8.3%	Lower 1.5%
Business Survival Rates – 1 year	90%	90%	Equal

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Corporate plan 2020 – 2024 and Mid-South West Regional Economic Strategy 2020 list key sectors – manufacturing, engineering &construction, retail, agri-food, health & life sciences, and tourism.

Biggest sectors by number of companies in council area (Broad Industry groups)[30]

- Agriculture
- Construction
- Production
- Retail
- Professional, Scientific & Technical

30 Inter-departmental Business Register (IDBR), NISRA

Lowest sectors by number of companies in council area (broad industry groups)

- Education
- ICT
- Finance & Insurance
- Health

5. Assets

Provides an insight into some of the key area strengths

Transport • M1/A4 corridor • A29/A31 routes • Proximity to key transport: 1. Belfast International Airport 35 miles from Cookstown 2. Foyle Port 45 miles from Cookstown	**Education Colleges:** • South Western College • Engineering & Advanced Manufacturing Curriculum Hub-Dungannon campus • Northern Regional College: Magherafelt Campus • CAFRE: Cookstown Campus.
Tourism • The Sperrins • Lough Neagh • Clogher Valley • Hill of the O'Neill & Ranfurly House • Seamus Heaney Home Place • OM Dark Sky • Springhill	**Retail** • Retail clusters in Cookstown, Dungannon and Magherafelt
Cross-border opportunities • Irish Central Border Area Network (ICBAN)	**Energy** • Renewable energy potential

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Public Sector	Private Sector
59,476	7%	10,118 (17%)	49,358(83%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Manufacturing	17,084	28.7%	11.1%	Higher 17.6%
Wholesale and Retail	11,266	18.9%	16.1%	Higher 2.8%
Human Health and Social Work Activities	5,865	9.9%	16.9%	Lower 7.1%
Education	5,619	9.4%	9.9%	Lower 0.5%
Construction	5,552	9.3%	4.8%	Higher 4.6%
Accommodation and Food Service	2,826	4.8%	6.6%	Lower 1.9%
Professional Scientific and Technical	1,974	3.3%	5.2%	Lower 1.9%
Transport and Storage	1,931	3.2%	3.8%	Lower 0.6%
Public Administration and Defence; Compulsory Social Security	1,525	2.6%	6.4%	Lower 3.9%
Administrative and Support Service activities	1,338	2.2%	6.7%	Lower 4.5%
Arts, Entertainment and Leisure	958	1.6%	2.0%	Lower 0.4%
Other services activities	759	1.3%	1.8%	Lower 0.5%
Information and Communication	753	1.3%	3.3%	Lower 2.0%
Mining and Quarrying	712	1.2%	0.2%	Higher 0.9%
Financial services and insurance	459	0.8%	2.4%	Lower 1.6%
Real Estate	365	0.6%	1.3%	Lower 0.7%
Water Supply, Sewerage and Waste Management / Remediation	348	0.6%	1.0%	Lower 0.4%
Agriculture, Forestry and Fishing	75	0.1%	0.1%	Equal
Electricity, Gas, Steam and Air Conditioning Supply	67	0.1%	0.3%	Lower 0.2%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Manufacturing

7. Invest NI Activity – Top 5 Investors (2018-19 to 2022-23)[31]

Provides an insight into investment activity by Invest NI supported companies

- Tobermore Concrete Products (Northern Ireland)
- Oakwood Door Design (Northern Ireland)
- Edge Innovate (Northern Ireland)
- Creagh Concrete (Northern Ireland)
- CDE Global (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

31 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

Estimated investment in excess of £100m across the following projects:

- **Robotics, Automation & Packaging Innovation Centre (RAPIC)** – Agri-food centre of excellence within Loughry Campus, Cookstown with a dedicated focus on digitisation and sustainability for Northern Ireland foods and drink processors.
- **Innovation Programme** – Innovation pot across Mid-South West Growth Deal.

DfI

- A29 Cookstown bypass

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans.

Mid Ulster Local Development Plan 2030 targets

- Creation of 8,500 new jobs
- Adequate supply of economic land available in our towns – immediate need for economic land in Dungannon.
- Bolster construction and manufacturing sectors (on which the area is particularly reliant).
- Need to facilitate job creation in sectors which are different from those which have traditionally provided the most employment in the District, e.g. office based sectors such as IT, professional and administration sectors.
- Facilitate and support rural entrepreneurship.

Corporate Plan 2020-2024

- Develop and deliver the Mid-South West Regional Economic Strategy in collaboration with our partner Councils (Armagh City, Banbridge and Craigavon Borough Council and Fermanagh and Omagh District Council).
- Continue to build on work to generate business diversification, innovation and expansion and increase employment opportunities.
- Continue to support the work of partners, including the Mid Ulster Skills Forum, to address employability and skills to ensure the existing and future needs of our region's business base are met.
- Continue to identify opportunity sites for development proposals and to deliver against existing plans for other key strategic sites (including Ann Street, Dungannon and the former Maghera High School site).
- Have a prioritised, sustainably resourced programme of capital investment supporting the enhancement of facilities for local people and contributing to the regeneration of the district.
- Work to deliver tourism investment and employment concentrating on Mid Ulster's 3 identified tourism strands.

Labour Market Partnership priorities

The following 3 Themes have been identified as local priorities: Economic Inactivity, Disability, Skilled Labour Supply

- **To improve employability outcomes and/or labour market conditions locally**: Sector Based Academies, Women Returners Programme, Employer Support Programme, Employer-led Disability Inclusion programme
- **To support delivery of Employability NI:** Job Fair / Employability Events

Community Planning Partnership priorities

Economic growth:

- Enhanced business start-up programme,
- Provide sustainable support for rural business development beyond European Union funded programmes,
- Coordinate a single business support package and 'one stop' contact point, Develop and implement broadband and mobile phone connectivity solutions across Mid Ulster,
- Prepare a Mid Ulster Investment Proposition to maximise inward investment.
- Grow high value and sustainable employment opportunities and link these to skills development.
- Develop satellite hubs for 'Grade A' office accommodation and the decentralisation of public sector jobs to Mid Ulster.
- Maximise Tourism investment and employment concentrating on Mid Ulster strategic tourism themes of Seamus Heaney, Activity and Heritage.
- Grow out Social Economy Sector.
- Create a competitive advantage for our principal towns, complimenting a 'Town Centre First' principle.
- Develop and deliver coordinated Village Planning and renewal initiatives.
- Investigate the potential of the co-location of public services in town centres, prioritising the re-use of derelict sites and/or building.

Infrastructure:

- Advance the development of the Strategic Road Network (the A29 – A31, A4, A6 and A5), including bypasses for the main towns and villages on the strategic routes.
- Investigate the feasibility of restoring rail links to and from Mid Ulster.
- Pilot an 'Integrated Transport Scheme' which takes account of our rural areas and people and businesses based there.
- Develop an Intra-Town Transit System which will include shuttle bus, cycling and walking links.
- Facilitate the delivery of strategic infrastructure schemes such as broadband and mobile phone coverage; 'Gas to the West'; Interconnector; sewerage and water and the Desertcreat Safety College.
- Improve our drainage and sewage network (including the promotion of Sustainable Drainage Systems) that is resilient to need and that is used correctly and appropriately.
- Commission a Renewable Energy Position Paper for Mid Ulster.
- Protect our environment through the improvement of our air and water quality.

- Increase the protection of access to and development of our heritage assets, both natural and man-made, including our strategic visitor sites; Seamus Heaney Countryside; O'Neill Heritage; Lough Neagh; Sperrins; Beaghmore and our forests.
- Secure the transfer of Lough Neagh into public ownership.
- Progress the reinstatement of the Ulster Canal and its greenway links.
- Provide an adequate supply of social and affordable 'homes-for-life' and Supported Living through Area Plan policy and direct public provision.
- Promote and provide for mixed community housing developments

Education and Skills:

- Extend the Numeracy and Literacy Support Framework in schools with identified disadvantage.
- Extend the number and range of Foundation Degrees and Degree courses delivered locally.
- Extend the provision and access to part-time education for adult returners.
- Invest in the school and Further Education College estates, including an enhanced local Campus for Northern Regional College in Magherafelt.
- Extend provision of Shared Education across Mid Ulster.
- Work to ensure every 18-year old person has a positive 'learning, work and life destination'.
- Provide a Family Support Centre in each school providing for disadvantaged communities, with the aim of building educational attainment levels.
- Ensure all Mid Ulster schools are supported to deliver STEM, entrepreneurial and creative development skills programmes.
- Establish a Mid Ulster Skills Forum bringing together employers, entrepreneurs, enterprise agencies, schools, and colleges to plan ahead to improve future employability.
- Develop and deliver a tailored high level Apprenticeship programme to meet the specific needs of Mid Ulster industry.
- Scope, develop and deliver a Mid Ulster Engineering Centre of Excellence.

3.11 Newry, Mourne and Down District Council

1. Demographics

Summary of the population base

- Total Population (All Ages) – 182,600 (9.6% of total NI population)[32]
- Working age population (16-64) – 110,700 (60.6% of Newry, Mourne, and Down Total population)
- Employment rate – 78.8%

2. Economic Performance

Selected Economic Indicators to provide a comparative picture

Headline Economic Indicators

Raise Productivity

Indicator	LGD Rank	Value (Latest Period)	NI Average
Labour Productivity (output per filled job, 2022)	7	£52,230	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	5=	1%	1.5%
Business Birth Rate (of active businesses, 2022)	7	8.2%	8.3%
FDI - New Jobs (% total, 2015-22)	5	0.8%	
Export Intensity (exports as % of all sales, 2022)	1	24%	17%
Total Early-Stage Entrepreneurship Activity Rates (2021-23)	9	6.0%	9.2%

32 Mid-Year Population Estimates by LGD, NISRA

Good Jobs

Indicator	LGD Rank	Value (Latest Period)	NI Average
Median Wage (gross weekly pay by place of work, 2023)	9	£481.60	£528.90
Employees earning above Real Living Wage (working age population 18+, 2022)	4=	86%	85.5%
Employees in Secure Employment (2021-22)	4	96.8%	95.6%

Regional Balance

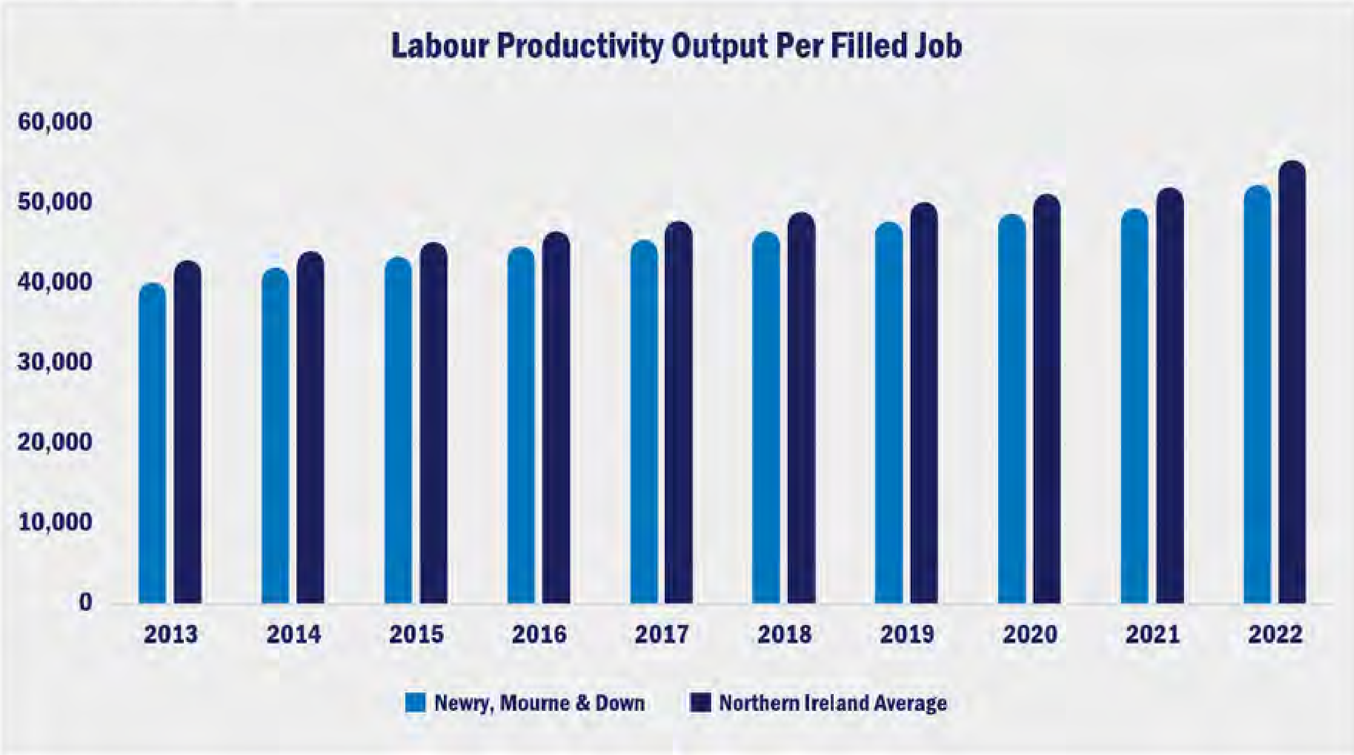
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	2	78.8%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	2	19.5%	24.7%
Gross Domestic Household Income (per head, 2021)	7	£17,275	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	4	41%	39.7%

Decarbonisation

Indicator	LGD Rank	Value (Latest Period)	NI Average
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	5	9.7	9.8
Renewable Electricity Generation (MW/h per household, 2022)	10	0.5	5.6

Performance against Economic Vision core metrics

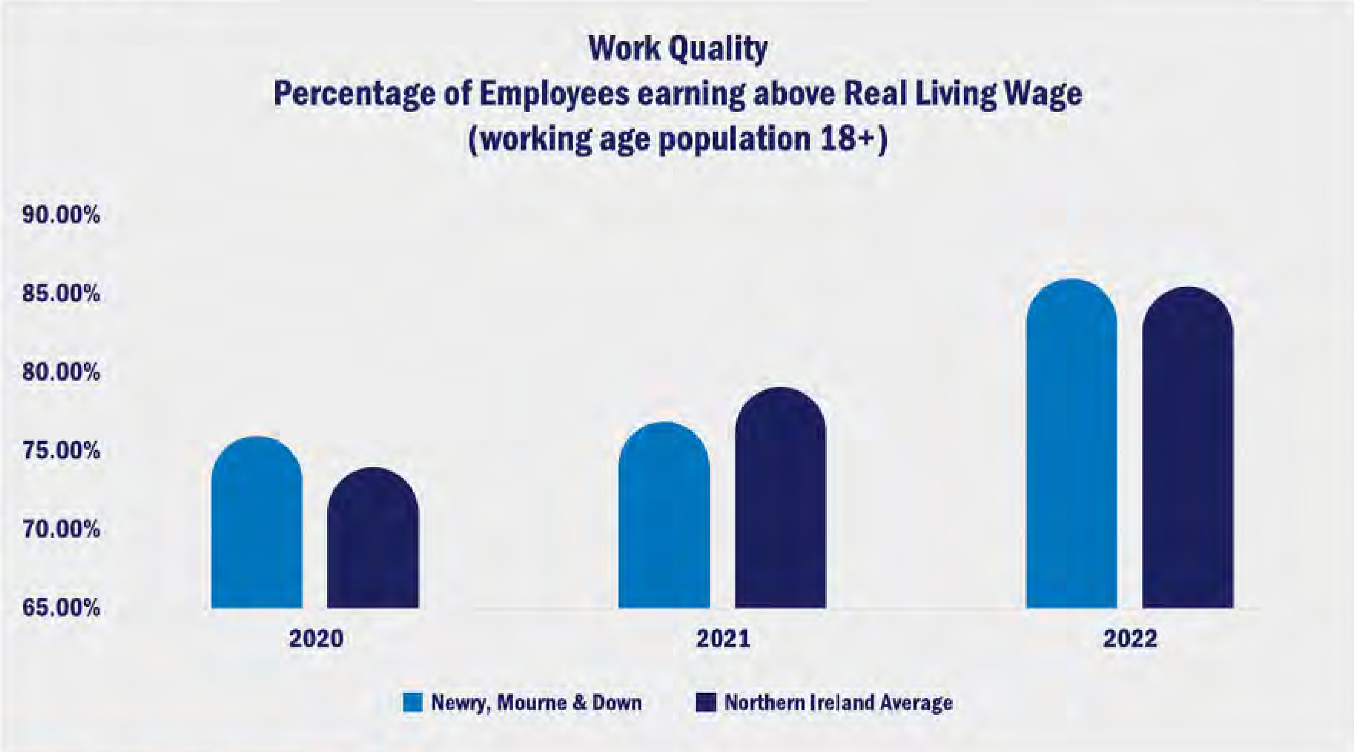
Raise Productivity



Source: Sub-Regional Labour Productivity, ONS

- **Increase Total Early-Stage Entrepreneurship Activity Rate** - Early-stage entrepreneurial activity in Newry, Mourne and Down is lower than average (6.0% compared to 9.2% over the 2021 to 2023 period).
- **Increase Labour Productivity** – In 2022, productivity in Newry, Mourne and Down was the fifth lowest in (£53,181 compared to NI average of £55,364).
- **Build on Export Intensity** – In 2022, 24% of the total value of business sales associable to Newry, Mourne and Down were exports. This was the highest export intensity of any LGD in the period (NI average of 17%, lowest rate was 13% in Ards and North Down).

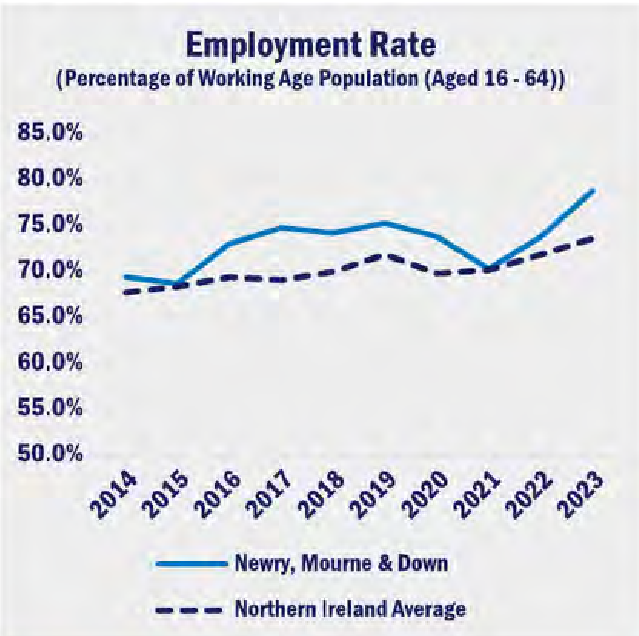
Good Jobs



Source: Labour Force Survey, NISRA

- **Increase Median Wage** – Newry, Mourne and Down has the second lowest median wage of any area in NI. In 2023, median weekly pay (for LGD of work) was £481.60 (NI average of £528.90)
- **Build on Work Quality –** Newry, Mourne and Down performs well on indicators of work quality. 96.8% of employees (18 and over) reported being in secure employment and 86.0% of employees earned above the Real Living Wage in 2022 (both the fourth highest proportions of any LGD).

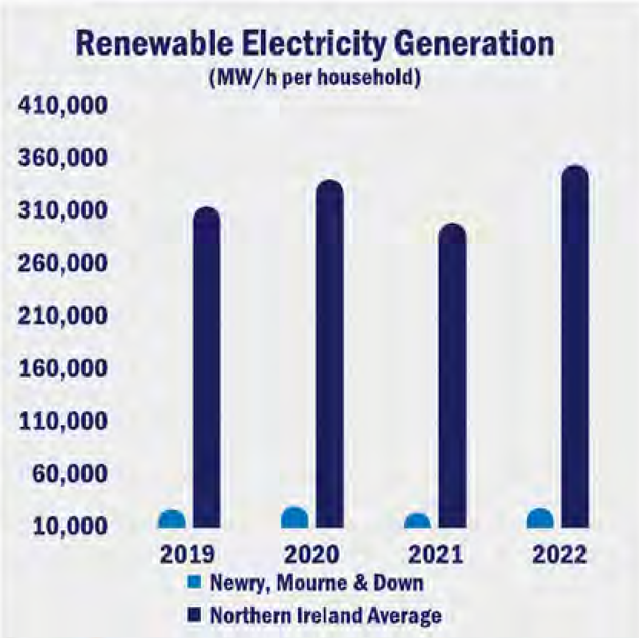
Regional Balance

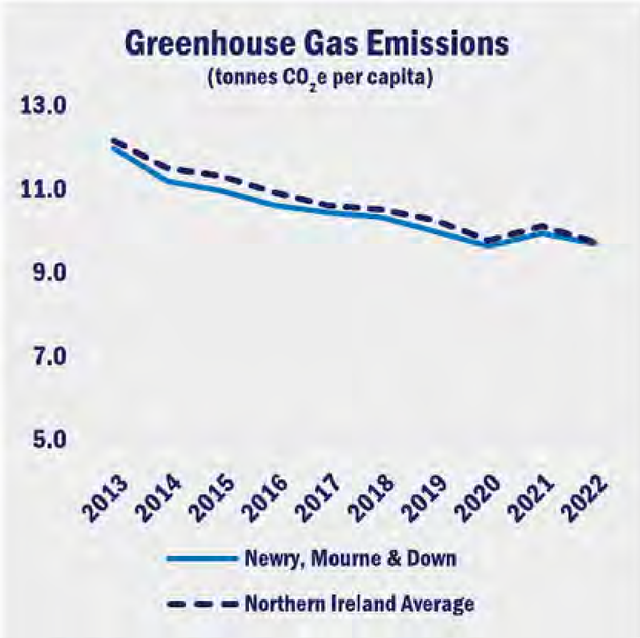


Source: Labour Force Survey, NISRA

- **Continue to reduce Economic Inactivity** – The economic inactivity rate in the area is below the NI average (19.5% vs. 24.7%) with only Mid & Wast Antrim having a lower rate.
- **Build on Employment Rate** – Working age employment rates in the area (78.8%) are higher than the NI average (73.6%) with only Mid & East Antrim exceeding this.

Decarbonisation





Source: Regional Greenhouse Emissions Statistics & Renewable Electricity Statistics by Local Authority, DSENZ

- **Increase Renewable Energy Regeneration** - Renewable electricity generation in the area is low on a per household basis. In 2022, total generation of renewable electricity amounted to 0.5 MW/h per household, the second lowest per capita generation in NI.

Additional Economic Indicators

Indicator	LGD Rank	Value (Latest Period)	NI Average
Gender Pay Gap	1	2.8%	8.3%
Lifelong Learning (Female)	11	12.7%	18.2%
Proportion of employees (18+) reporting opportunities for career progression	1	63.1%	58.3%

Source: Annual Survey of Hours & Earnings and Labour Force Survey, NISRA

- Newry, Mourne and Down has the highest proportion of current employees reporting opportunities for career progression (63.1% compared to a regional average of 58.3%).
- Newry, Mourne and Down is one of the few areas where hourly median earnings for women (on an LGD of work basis) exceed those for men. In 2023, female median hourly earnings were 2.8% higher than male hourly earnings.

- Rates of engagement in education or training are notably poor in the area. In 2022, 12.7% of women between the ages of 25 and 64 were engaged in education or training, the lowest proportion of any LGD and 5.5pps lower than the regional average. Male participation in education or training was also poor at 10.5% compared to an NI average of 14.4%.

3. Business Base

Provides an overview of the size and makeup of the business base

Total businesses (2019) – 9,375 – 12% of all businesses in NI

Percentage of Total Businesses in the region:

- Microbusiness (0-9 employees) 92%
- Small business (10-49 employees) 7%
- Medium business (50-249 employees) 1%
- Large Business (250+ employees) 0.2%

Business Demography

	Percentage	NI Average	Difference
Business Birth Rate	8.2%	8.3%	Lower 0.1%
Business Survival Rates – 1 year	90%	90%	Equal

Source: Inter-Departmental Business Register (IDBR), NISRA

4. Key Sectors

Provides an insight into the key sectors in the area

Regeneration & Economic Development Strategy 2020-2025 stated;

- Stabilise and develop existing sectoral strengths - Agriculture, advanced manufacturing & engineering, agri-food & fishing, technology, retail & services.
- Support new & emerging sectors - ICT & Digital Technologies, professional Business services, tourism.

Biggest sectors by number of companies in council (Broad Industry Groups)[33]

- Agriculture
- Construction
- Retail
- Production
- Professional, Scientific & Technical

33 Inter-departmental Business Register (IDBR), NISRA

Lowest sectors by number of companies in council (Broad Industry Groups)

- Education
- Finance & Insurance
- ICT
- Property

5. Assets

Provides an insight into some of the key area strengths

Transport • A1 transport corridor • Cross-border opportunities: 1 hour access to Dublin and 1 hour access to Belfast. Proximity to Dundalk, Drogheda • Warrenpoint Port	**Education** • Southern Regional College Newry Campus • Curriculum Hub: Life & Health Sciences • South Eastern Regional College, Ballynahinch Campus
Tourism • Mourne Gullion Strangford UNESCO Global Geopark (designated in 2023) • Downpatrick heritage, • Castle Ward	**Retail/Industry** • Retail offering – Newry City • Marine energy research opportunities

6. Employment

Provides an insight into the labour market structure and the broad sectors that provide employment

Total Jobs	% of all NI Jobs	Public Sector	Private Sector
62,029	8%	15,166 (24%)	46,862 (76%)

Source: Business Register and Employment Survey, NISRA

Employment Breakdown by Broad Sector

Industry	Total number	Percentage	NI	Difference
Wholesale and Retail	12,161	19.6%	16.1%	Higher 3.5%
Human Health and Social Work Activities	10,066	16.2%	16.9%	Lower 0.7%
Manufacturing	8,950	14.4%	11.1%	Higher 3.3%
Education	6,786	10.9%	9.9%	Higher 1.0%
Accommodation and Food Service	4,620	7.4%	6.6%	Higher 0.8%
Construction	4,447	7.2%	4.8%	Higher 2.4%
Administrative and Support Service activities	2,623	4.2%	6.7%	Lower 2.5%
Professional Scientific and Technical	2,238	3.6%	5.2%	Lower 1.6%
Transport and Storage	2,102	3.4%	3.8%	Lower 0.4%
Public Administration and Defence; Compulsory Social Security	1,742	2.8%	6.4%	Lower 3.6%
Arts, Entertainment and Leisure	1,224	2.0%	2.0%	Equal
Information and Communication	1,164	1.9%	3.3%	Lower 1.4%
Other services activities	1,129	1.8%	1.8%	Equal
Water Supply, Sewerage and Waste Management / Remediation	1,126	1.8%	1.0%	Higher 0.8%
Financial services and insurance	778	1.3%	2.4%	Lower 1.1%
Real Estate	507	0.8%	1.3%	Lower 0.5%
Agriculture, Forestry and Fishing	242	0.4%	0.1%	Higher 0.3%
Mining and Quarrying	98	0.2%	0.2%	Lower 0.1%
Electricity, Gas, Steam and Air Conditioning Supply	27	0.0%	0.3%	Lower 0.3%

Source: Business Register and Employment Survey, NISRA

Largest Employment Sector Wholesale and Retail

7. Invest NI Activity – Top 5 Investors[34]

Provides an insight into investment activity by Invest NI supported companies

- Finnebrogue Vegetarian Company (Northern Ireland)
- STATSports (Northern Ireland)
- Finnebrogue Bacon Company (Northern Ireland)
- Around Noon (Northern Ireland)
- Modern Tyres (Northern Ireland)

Activity is based on business development projects (e.g. job creation, R&D, skills development) brought forward by Invest NI customers over the past 5 years that have been approved for an Invest NI offer of support.

34 Council Economic Profiles, Invest NI, March 2024

8. City and Growth Deal projects

Details of capital projects through City and Growth Deals, and other government projects

- **Mourne Mountains Gateway, £44m** – Visitor Centre in the Mournes, with a Gondola Ride from Donard Park, Newcastle.
- **Newry Mourne & Down Innovation Hub** – stimulate innovation and develop greater awareness and uptake of new and emerging digital skills for local businesses.

A further £80m is allocated to the Belfast Region Digital Programme and will benefit all 6 councils in the Belfast Region City Deal.

DfC

- Newry City regeneration, over £40m

DfI

- Newry Southern Relief Road, £93m

9. Economic Strategy & Partnership Plans

A summary of key areas of focus as detailed in council and partnership plans.

NMD Corporate Plan 2024–2027

Aim to progress the following principal projects;

- Organisational transformation and delivery of sustainable services
- Newry City Centre Regeneration
- Downpatrick Regeneration
- Belfast Region City Deal Projects including skills and innovation
- Warrenpoint Health and Wellbeing Centre
- Newcastle tourism and recreation facilities
- Local Development Plan Strategy

Regeneration & Economic Development Strategy 2020-2025

Strategic priorities and Sub-Themes;
Supporting Entrepreneurship, business growth & Innovation

- Support growth and creation of new businesses starts
- Supporting growth in innovation and digital technologies
- Building international relations
- Strengthening business engagement

Improving Employability and skills

- Address skills gaps and future skills needs, through education to industry engagement
- Promote employment opportunities and attract appropriately skilled labour to the area
- Upskill / reskill those in employment, unemployed, underemployed, or economically inactive
- Promote alternative pathways for employment
- Investing in Regeneration & modern Infrastructure
- Digital transformation: creating a connected region
- Regeneration of city, towns, and villages
- Strategic investment proposals

Dublin-Belfast Economic Corridor actions

- Skills: analyse the corridor's workforce and publish snapshots of insights, develop a clear skills policy and strategy specific to the corridor, become active in skills development in priority sectors.
- Infrastructure: identify infrastructure gaps and map assets with development potential, develop business cases for relevant infrastructure projects.
- Research & Development: Grow DBEC's profile within the R&D community and support relationship building, secure, funding for innovation hubs along the corridor, Explore the potential for developing a circular economy approach along DBEC.
- Ways of working: Be an active player in the corridor's ecosystem, through activities, workshops, and events, Resource the Partnership with skilled staff and provide capacity to continue to grow, Complement member councils' seed an ongoing funding with external funding sources, Develop a clear marketing strategy and actively engage with stakeholder groups.

Labour Market Partnership priorities

Key Themes: Economic Inactivity, Skilled Labour Supply, Disability

- **Economic Inactivity**: Get Work Ready; pre-employment support and Enterprise Pathways Programme – Go Succeed
- **Skilled Labour Supply**: Upskilling for Growth, Employability Academies, A Place to Work
- **Disability**: Employer Engagement – Disability Awareness
- **Increased Awareness**: Employment Pathway events, Increased awareness of employability and skills programmes and Promote apprenticeships, traineeships, and placements as pathways to employment

Community Planning Partnership priorities

- **Economic Development, Regeneration and Tourism**: Level of lifelong learning, Level of educational wellbeing, Level of jobs and earnings, Level of income and wealth, Level of economic investment, Level of tourism revenue
- **Environment and Spatial Development**: Level of connectivity, Level of sustainable energy, Level of quality housing, Level of quality living environment, Level of rich, diverse, natural environment
- **Health and Wellbeing**: Level of early years support, Level of quality of school life, Level of life expectancy, Level of work life balance, Level of preventable death, Level of health status
- **Safety and Good Relations**: Level of social connections, Level of social capital, Level of civic participation, Level of personal safety and crime rate

4. DATA LIMITATIONS

It is important to remember that there are limitations to the data used in this Technical Annex. It has helped guide our approach to new policy direction and led us to form opinions, but interpretation is subjective. There will be many different interpretations or views on the same information. It is important that over-interpretation of the evidence is avoided as evidence has been selected to form a snapshot comparative picture.

Information taken from our strategies is the interpretation of the authors of this document only and is being used in the council economic profiles to illustrate focused analysis.

Some statistical sources are not designed to be representative at the sub-regional level, meaning that there is greater statistical uncertainty in some LGD level estimates.

Due to small sample sizes, there can be greater variability and wider swings in statistics at LGD level across time. This may affect the LGD rankings for one particular year (although in general it should be possible to identify the areas with chronically poor or consistently strong performance for most indicators).

Some data sources are experimental or otherwise not directly comparable with other regional estimates and occasionally we need to make pragmatic choices about the best estimates to use for comparison. E.g. when making productivity comparisons on a regional basis output per hour worked is generally preferred. We use Output per Job as OpHW estimates at NI LGD level have only recently been developed and use different source data compared to GB regions and NI.

APPENDIX A

Headline Economic Indicators by NI LGD

Raise Productivity

	Antrim & Newtown-abbey		Ards & North Down		Armagh, Banbridge & Craigavon		Belfast		Causeway Coast & Glens		Derry City & Strabane		Fermanagh & Omagh		Lisburn & Castlereagh		Mid & East Antrim		Mid Ulster		Newry, Mourne & Down		NI Average
Indicator	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	
Labour Productivity (output per filled job, 2022)	3	£56,956	10	£47,957	8	£51,632	1	£61,868	9	£50,430	11	£47,229	6	£53,181	4	54,675	5	£53,189	2	£58,702	7	£52,230	£55,364
BERD Intensity (Business Expenditure R&D as % of output, 2022)	3	2.0%	10=	0.5%	1=	2.1%	1=	2.1%	9	0.6%	5=	1%	7=	0.8%	7=	0.8%	10=	0.5%	4	1.9%	5=	1%	1.5%
Business Birth Rate (of active businesses, 2022)	8	8.1%	4	8.6%	3	9.0%	1	9.2%	10	7.3%	2	9.1%	9	7.6%	5	8.4%	6	8.3%	11	6.8%	7	8.2%	8.3%
FDI - New Jobs (% total, 2015-22)	4	4.1%	7	0.4%	9=	0.2%	1	78%	11	0.0%	2	10.7%	8	0.3%	3	4.6%	6	0.7%	9=	0.2%	5	0.8%	
Export Intensity (exports as % of all sales, 2022)	10=	13%	10=	13%	3	20%	8	15%	7	16%	4	19%	2	22%	9	14%	5=	18%	5=	18%	1	24%	17%
Total Early-stage Entrepreneurial Activity Rate (2021-23)	8	6.9%	1	13%	10	5.9%	2	11.8%	11	5.6%	3	11.4%	7	8.3%	4	9.8%	5	9.7%	6	8.5%	9	6.0%	9.2%

Good Jobs

	Antrim & Newtown-abbey		Ards & North Down		Armagh, Banbridge & Craigavon		Belfast		Causeway Coast & Glens		Derry City & Strabane		Fermanagh & Omagh		Lisburn & Castlereagh		Mid & East Antrim		Mid Ulster		Newry, Mourne & Down		NI Average
Indicator	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	
Median Wage (gross weekly pay by place of work, 2023)	2	£529.70	11	£450.10	3	£518.50	1	£596.80	10	£459.10	7	£492.30	6	£495.00	5	£508.30	8	£487.30	4	£510.80	9	£481.60	£528.90
Employees earning above Real Living Wage (working age population 18+, 2020-22)	2	88.0%	9	82.8%	7	84.8%	6	85.2%	10	82.2%	11	79.7%	4=	86%	1	88.5%	3	87.7%	8	84.3%	4=	86%	85.5%
Employees in Secure Employment (2021-22)	9	94.2%	6	95.3%	2	98.1%	10	93.9%	11	93.2%	5	96.6%	8	94.5%	7	95%	1	98.2%	3	97.0%	4	96.8%	95.6%

Regional Balance

	Antrim & Newtownabbey		Ards & North Down		Armagh, Banbridge & Craigavon		Belfast		Causeway Coast & Glens		Derry City & Strabane		Fermanagh & Omagh		Lisburn & Castlereagh		Mid & East Antrim		Mid Ulster		Newry, Mourne & Down		NI Average
Indicator	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	**LGD Rank**	**Value (Latest Period)**	
Employment Rate (people 16 – 64 in work, 2023)	3	78.5%	6	75.5%	5	76.6%	10	67.9%	9	68.3%	11	65.4%	8	70.6%	4	77.8%	1	79.5%	7	74.9%	2	78.8%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	3	19.8%	7	23.6%	4	20.9%	9	30.5%	10	30.6%	11	32.7%	8	26%	5	21.7%	1	19.3%	6	23.3%	2	19.5%	24.7%
Gross Domestic Household Income (per head, 2021)	3	£17,960	2	£19,108	8	£17,216	5	£17,507	10	£16,918	11	£16,572	9	£17,132	1	£19,223	4	£17,767	6	£17,495	7	£17,275	£17,636
Tertiary Education Attainment Rate LV 4+ (working age population 16-64, 2023)	2	45.6%	3	44.8%	6	38%	7	37.6%	=8+	35.8%	8=	35.8%	10	35.6%	1	50.1%	11	34.2%	5	40.1%	4	41%	39.7%

Decarbonisation

	Antrim & Newtown-abbey		Ards & North Down		Armagh, Banbridge & Craigavon		Belfast		Causeway Coast & Glens		Derry City & Strabane		Fermanagh & Omagh		Lisburn & Castlereagh		Mid & East Antrim		Mid Ulster		Newry, Mourne & Down		NI Average
Indicator	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	LGD Rank	Value (Latest Period)	
Greenhouse Gas Emissions (tonnes CO_2e per capita, 2022)	3	7.9	2	7	7	10.2	1	4.7	9	13.5	8	10.8	11	19.4	4	8.1	6	9.9	10	15.5	5	9.7	9.8
Renewable Electricity Generation (MW/h per household, 2022)	7	2.3	9	0.6	8	2.1	11	0.1	2	16.8	3	16.4	1	24.4	6	2.8	5	4.5	4	6.1	10	0.5	5.6

LEGEND										
1	2	3	4	5	6	7	8	9	10	11

APPENDIX B

Sources of information used in Council Profiles

Council Strategies

Antrim & Newtownabbey Council 2016-2023 Economic Strategy

Ards & North Down Integrated Strategy for Tourism, Regeneration and Economic Development 2018-2023

Armagh City, Banbridge and Craigavon Borough Council Corporate Plan 2023-2027

Belfast Draft Council Economic Strategy 2022-2030

Causeway Coast & Glens Council Corporate Strategy 2021-2025

Fermanagh & Omagh Draft Inclusive Economy Action plan 2024-2029

Integrated Economic Strategy for Derry City and Strabane District 2017-2032

Lisburn & Castlereagh Council Corporate Plan & ambitions 2024-2028

Mid & East Antrim Corporate Plan 2024-2028

Mid Ulster Corporate Plan 2020-24

Mid Ulster Local Development Plan 2030

Newry, Mourne and Down Corporate Plan 2024-27

Newry, Mourne and Down Regeneration & Economic Development Strategy 2020-2025

Government Statistical sources

Annual Population Survey, NISRA

Annual Survey of Hours and Earnings (ASHE), NISRA

Business Register and Employment Survey (BRES), NISRA

Family Resources Survey, Dept for Communities

Inter-departmental Business Register (IDBR), NISRA

Labour Force Survey, NISRA

Mid-Year Population Estimates by LGD, NISRA

Northern Ireland Economic Trade Statistics (NIETS), NISRA

Regional Greenhouse Gas Emissions Statistics and Renewable Electricity Statistics by Local Authority, Department of Energy Security and Net Zero (DSENZ)

Research and Development Survey, NISRA

Sub-Regional productivity: Labour productivity indices, ONS

Other

Community Planning Partnership Plans, NI Councils, 2023-2024

Council Economic Profiles, Invest NI, March 2024

Labour Market Partnerships Plans, NI Councils, 2023-2024

Department for the Economy

An Roinn Geilleagair

www.economy-ni.gov.uk

DfE/Invest NI/Councils/NILGA workshop
15 October 2024

Creating a globally competitive economy that works for everyone

Department for the Economy
An Roinn Geilleagair
www.economy-ni.gov.uk

Agenda

- Updates
- Local Economic Partnerships: establishment and functioning
- Funding formula
- Forward look

Department for the Economy

An Roinn Geilleagair

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Context


Invest Northern Ireland
Department for the Economy
www.economy-ni.gov.uk
DELIVERING CHANGE TO ACHIEVE A 10X ECONOMY
INDEPENDENT REVIEW OF INVEST NORTHERN IRELAND
ACTION PLAN


Northern Ireland Executive
Our Plan:
Doing What Matters Most
Draft Programme for Government
2024-2027


Invest Northern Ireland
Department for the Economy
An Roinn Geilleagair
Sub-Regional Economic Plan
OCTOBER 2024


Invest Northern Ireland
OUR FUTURE
IN FOCUS
Delivering a regionally balanced, productive, sustainable, and prosperous economy
BUSINESS STRATEGY 2024-27

Regional Strategy – The Headlines

- Invest NIs Regional Strategy will be a **Tier One Priority in our Business Strategy** and will:

  - Set **new corporate regional targets** for indigenous and externally owned business growth
  - See our **regional headcount increase by 40%**
  - **Increase the number of companies** the regional teams directly support, to **£2m turnover**
  - Regional Leaders will have a relationship with **the top 20 regional clients**
  - **Grow our Regional Office network** from four teams to five
  - Commit to delivering **65% of Invest NIs investments outside the Belfast Metropolitan Area** by 2026/27
- The strategy will drive **greater internal collaboration and increased partnership** working externally and gives Invest NI an advocacy role for regional economic growth.
- Introduces an ambitious **new Regional Property Programme** to enable higher levels of business investment across the regions and **integrates City & Growth Deals into our regional development strategy**

Invest Northern Ireland

A new Client Definition

- A new Client definition and approach to allow us to engage with businesses in a strategic and structured way.

An Invest NI Client

'A Manufacturing and / or Tradeable Services business with the potential to achieve at least 25% of sales external to Northern Ireland (or at least £250,000 external sales, whichever is lower), and the potential to employ at least 10 staff, within 5 years'.

Our job is to help you achieve this potential.

Foundational financial support is targeted at the following strategic priority areas <u>for all businesses</u>:

Growth Finance – Access to Finance

Innovation – Innovation Vouchers & Business Innovation Grant

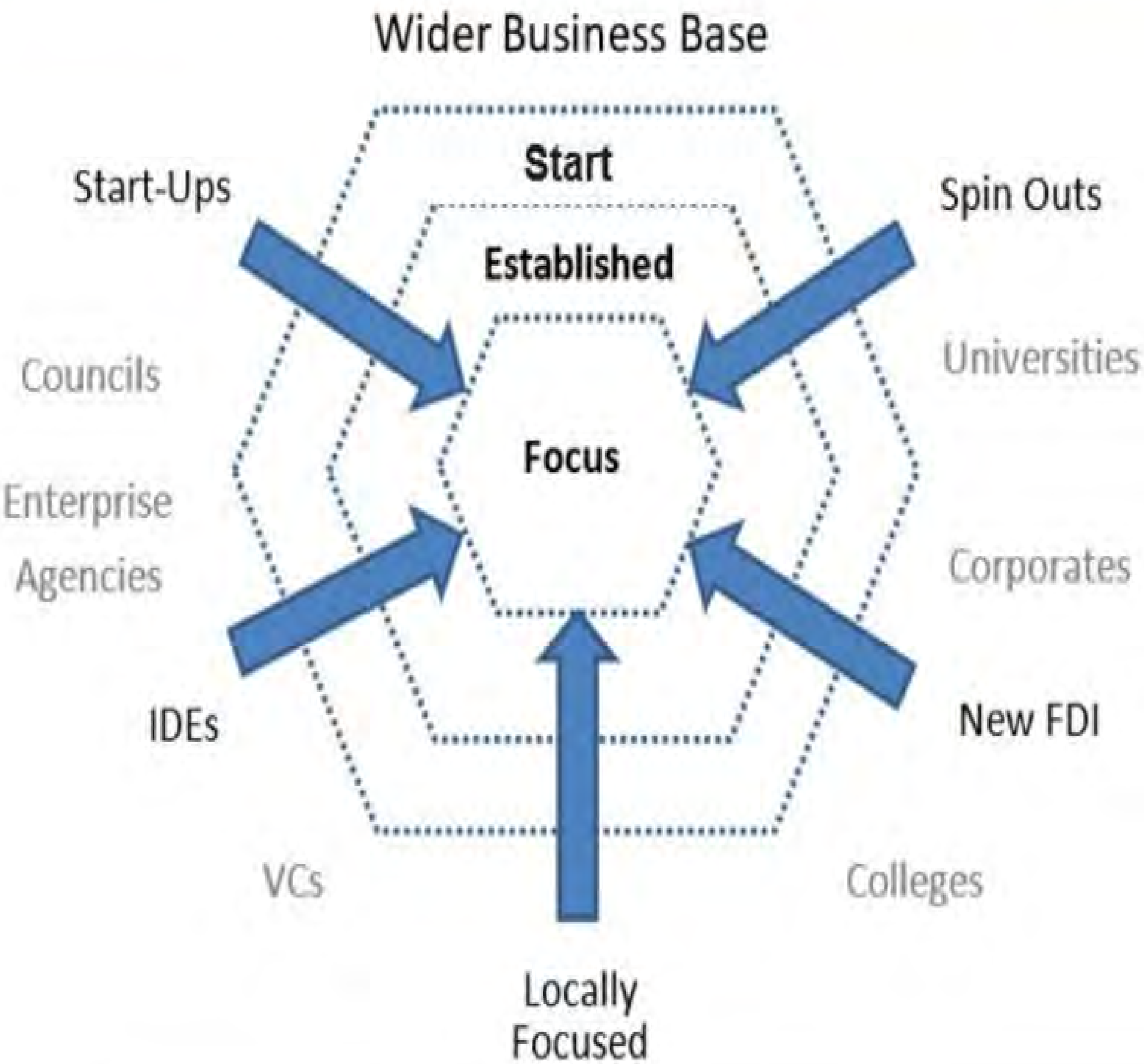
Sustainability – Energy Efficiency Capital Grant

Digitalisation – Digital Transformation Flexible Fund

We will review and strengthen in this area over the next 3 years.

Invest Northern Ireland

A new Client Engagement Approach



- Open for Business
- More Simple
- More transparent
- Broader engagement
- Spark Ambition
- Cater for different business needs


Supporting Local Partnerships
NI COUNCILS
Innovation
Sustainability
INVEST NI REGIONAL PARTNERS
Inclusivity
Place
Go Succeed
NI Business Support
WOMEN IN BUSINESS
POLITICIANS
SENI
DfE, DfC, DAERA
MAKERS ALLIANCE
MANUFACTURING NI
ENTERPRISE NI
INTERTRADE IRELAND
INNOVATE UK
CATALYST
TECHSTART
CLARENDON
ACCOUNTANTS
CHAMBERS
BANKS
UNIVERSITIES
FE COLLEGES
QUEEN'S UNIVERSITY BELFAST
SWC
SOUTH WEST COLLEGE
Causeway Coast & Glens Borough Council
Ards and North Down
Mid Ulster
Mid & East Antrim
northern ireland water
Antrim and Newtownabbey
Belfast City Council
LCCC
Ulster University
CLIENTS
MEGA
LONDONDERRY CHAMBER

Department for the Economy
An Roinn Geilleagair
www.economy-ni.gov.uk

Balancing what?

- Focus of these partnerships will be **productivity improvement**.
  - Positive impact on a range of other indicators e.g. median wages and employment rate
  - Common need across Council areas
  - Enable broad range of interventions

Department for the Economy

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Key areas for decisions

LEP Membership → LEP establishment and functioning → Projects in Scope → Project delivery → Funding

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LEPs

- Department will produce guidance for Councils on establishment, composition and governance of LEPs.
- We want to hear your views on how these would work best.
- We are committed to finalising guidance as soon as possible to enable Councils to establish partnerships.

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1 - LEP membership

- Membership will be for the Council to consider.
- DfE will approve the final list of suggested partners.
- No group/organisation should have a majority in the LEP
- Councils should consider equality of opportunity in the membership of LEPs
- We would expect to see representatives from the following; universities, colleges, local enterprise agencies, business community and civil society

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LEP Membership - questions

- What size? Should there be a maximum number?
- How long should members be appointed for?
- Are there existing structures that would fit this purpose?
- Does membership need to be agreed by elected members?
- How best to manage conflict of interests- e.g. members and promoters?
- How do ensure high quality partnership that can deliver?
- Should we include guidance around desirable skills/experience for partnerships?

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2 - LEP functioning

- Responsible for identifying and overseeing development and subsequent monitoring of project proposals
- Submitting prioritised list (with supporting rationale) of projects to Councils
- Decisions to be made by consensus where possible
- Council will employ staff required to manage and support operation of LEP and delivery of projects.
- Transparency and record keeping of decisions

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LEP functioning – questions

- Should there be a minimum number of meetings per year?
- Should the Department provide guidance on project identification?
- Should we provide guidance on areas where duplication may arise?
- If relationships breakdown at LEPs – are there any safeguards the Department should put in place around disbanding and reforming a LEP?
- What type of support, monitoring and evaluation should be required?

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3 - Projects in scope

- Must align with Council priorities
- Align with DfE priorities and PfG
- We recognise that different areas may have different priorities and do not want to constrain LEPs in identifying areas of economic priority – maximise autonomy for LEPs

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Projects in scope – questions

- Open to ongoing work (e.g. CWB)?
- Should consultancy be within scope?
- How can we minimise duplication and maximise value for money across all government spending in the area?
- Thoughts on projects identification process

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4 - Council role

- Significant role in supporting and/ or delivering projects (engaging with project promoters, business cases)
- Accountable for spend (same as City Deals)
- Council to notify DfE of projects that would be delivered by government

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Council role – questions

- Will LEP prioritised list need to be validated by elected members in Council?
- What further guidance would be useful on project delivery?
- Delegated limit for Councils to approve vs INI/DfE approval? At what level?

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5 - INI and DfE role

- INI and DfE will join partnerships as observer
- Approving partnership
- Providing challenge function on project priorities
- We will provide support in research/analysis
- INI and DfE will support Partnerships in the identification of suitable projects
- Liaise with relevant policy areas/ALBs in DfE and NICS where projects overlap and on other priority areas for action

INI and DfE role - questions

- Is DfE acting as observer acceptable?
- Are there other specific areas where INI or DfE could provide further support?

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6 - Funding

- Remit – Local economic focus, but aligning with economic vision
- Formula to reflect aim to improve productivity
- Formula to be agreed
- Flexibility key- emphasis on outcome not process
- Intention to seek City Deal model of funding being available across the three years but not confirmed yet.
- Funding still to be secured

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Funding formula

Three options we are considering:

a) Need alone

b) Base + Need

c) Base + Need + Peripherality

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Need alone

- No base funding.
- Based on productivity performance – all areas have some level of need.

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Base + Need

- Takes into account fixed costs that arise with running partnership
- Includes need – but not entirely based on it
- Different options in how much funding to allocate to each element. 30% base funding is used for LMPs.

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Base + Need + Peripherality

- Includes context measure peripherality (OECD measure: distance to metro area and rural/urban split)
- Different options in proportion of funding to each element.

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Funding formula - discussion

- Base funding – whether to have it and what proportion?
- Need - based on productivity – views on this measure?
- Peripherality – OECD measure: distance from metro area and rurality – views on this measure?

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Next Steps

Guidance and decisions on all areas discussed today as soon as possible to enable

By Dec 24: Partnerships to be established

Jan - Mar 25: Proposed projects to be brought forward for approval

Apr 25 - March 28: Approved projects to be funded for delivery

Invest Northern Ireland

Our Future IN FOCUS

Delivering a regionally balanced, productive, sustainable, and prosperous economy

2024/25 – 26/27 **Business Strategy**

Invest Northern Ireland

Our Vision

Invest NI is recognised as a leading economic development agency, instrumental in driving a balanced, sustainable, productive, and prosperous Northern Ireland economy through unlocking the potential of businesses across the region.

Our Mission

To work with businesses to accelerate their growth by increasing external sales and innovation, creating good quality jobs, boosting productivity and skills, growing inward investment and reducing carbon emissions.

Our Strategy on a Slide...

An economy characterized by

- High Productivity
- Good Jobs
- Regional Balance
- Decarbonised

Supporting businesses across our strategic priorities to drive the desired economic outputs

- Boosting Business Investment
- Accelerating Innovation and Skills
- Driving Global Ambition
- Developing and Achieving Sustainability
- Maximising City and Growth Deals
- Promoting Places and Partnerships

Our ways of working

Impact Centric Decisions
Clearly defined measures for economic performance focused on the right areas

Purposeful Partnerships
Meaningful and productive partnerships internally and with key stakeholders, the business community and beyond

Culture of Delivery
Relentless in our approach to drive the economy with a high performing team and culture

Good Governance
Effective Leadership and strategic alignment to deliver return on investment and transparency in public expenditure

Our foundations

Organisational Excellence
A lean, efficient and high performing organisation, continuously innovating to drive improvement with a 'Digital First' culture

Integrated NI Operating Environment
Aligned focus across business, partners and stakeholders on shared goals and objectives to maximise impact

Customer-Focused Programmes & Products
Flexible, agile and future-focused programmes and products tailored to business needs

Our Strategic Priorities

- Boosting Business Investment
- Developing and Achieving Sustainability
- Accelerating Innovation and Skills
- Maximising City and Growth Deals
- Driving Global Ambition
- Promoting Places and Partnerships

To achieve the Economy Minister's Economic Vision, we will focus on **six strategic priorities**. These will guide and determine our activity **across all our interactions** with business.

Our Strategic Objectives – What outcomes are we targeting?

Support **5,000 Productive Investments** in Businesses across NI
Up 12%

Increase **External Sales** in our Client Portfolio to
£25.75bn
Up 16%

Support **575** investments in **Net Zero, Energy & Resource Efficiency Technologies**
Up 12%

Increase **Expenditure in R&D** in our Client Portfolio to
£750m
Up 21%

Support at least **450** local companies that are **New to Invest NI**
Up 25%

Increase **Sales per Employee** in our Client Portfolio to
£245k
Up 14%

By 2026/27 **65%** of our Investments will be **'Outside of the BMA[1]'**
Up 6 pps

Increase **Net Employment** in our Client Portfolio to
141,000
Up 8%

Win at least **60 New to NI** Foreign Direct Investments (FDI)
Up 33%

Areas of Focus

- Productivity
- Regional Balance
- FDI
- Sustainability
- Investment
- Innovation
- Working with more businesses
- External Sales
- Employment

Invest Northern Ireland

1. The Belfast Metropolitan Area (BMA) is defined as the Belfast City, Antrim & Newtownabbey, Lisburn & Castlereagh City and Ards & North Down District Council areas.

Our Transformation Journey

*We have already begun our **transformation journey**...*

*...and will complete it through our **Business Strategy**.*

Invest Northern Ireland

Back to Agenda

A new Client Definition

- A new Client definition and approach to allow us to engage with businesses in a strategic and structured way.

An Invest NI Client

'A Manufacturing and / or Tradeable Services business with the potential to achieve at least 25% of sales external to Northern Ireland (or at least £250,000 external sales, whichever is lower), and the potential to employ at least 10 staff, within 5 years'.

Our job is to help you achieve this potential.

Foundational financial support is targeted at the following strategic priority areas <u>for all businesses</u>:

Growth Finance – Access to Finance

Innovation – Innovation Vouchers & Business Innovation Grant

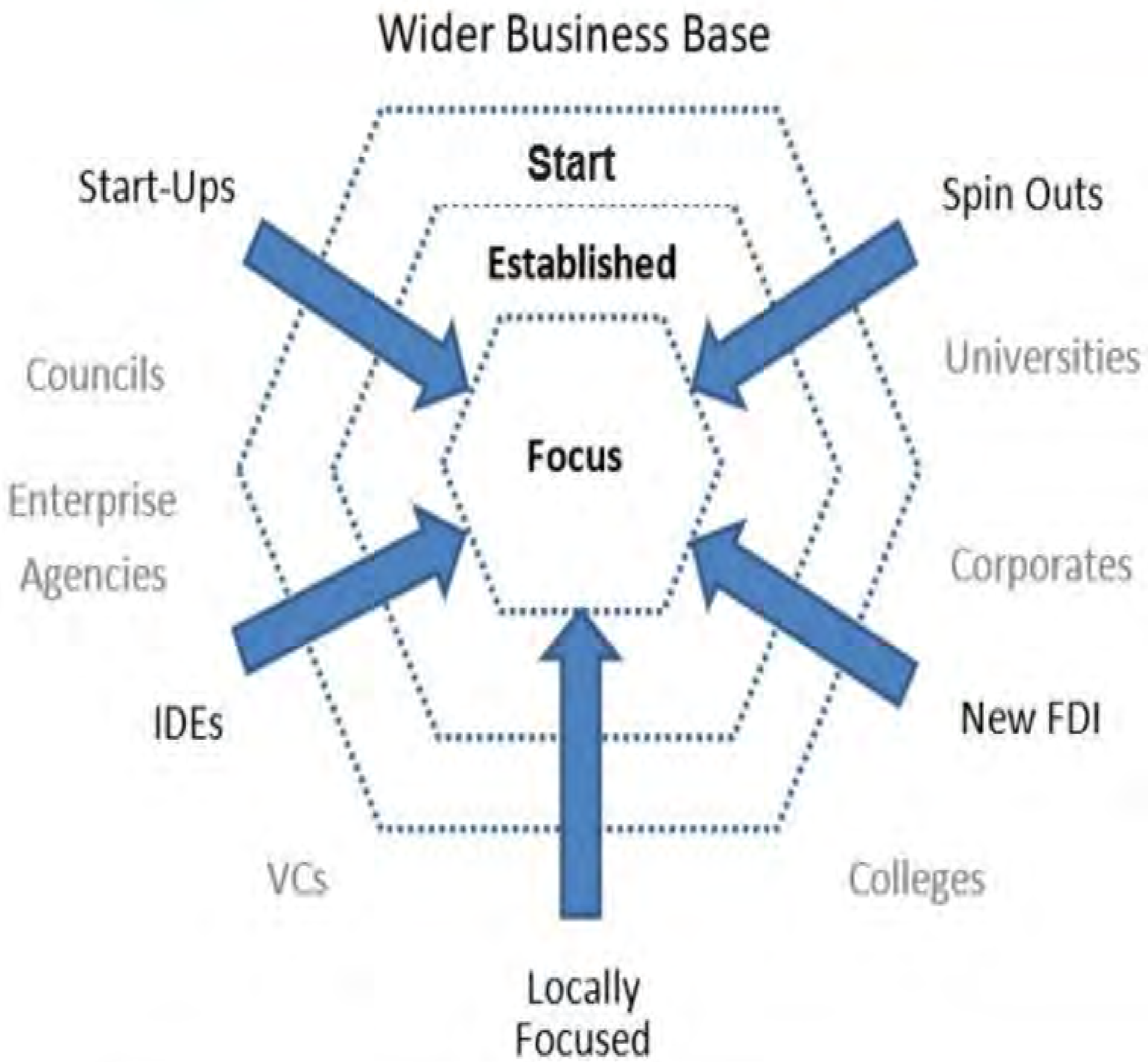
Sustainability – Energy & Resource Efficiency Capital Grant

Digitalisation – Digital Transformation Flexible Fund

We will review and strengthen in this area over the next 3 years.

Invest Northern Ireland

A new Client Engagement Approach



- Open for Business
- More Simple
- More transparent
- Broader engagement
- Spark Ambition
- Cater for different business needs

Invest Northern Ireland

Back to Agenda

Focusing on Sectors of Strength and Opportunity

- Building on DfE Priority Sectors work, we will **develop strategies** to drive growth in each of our core sectors for the next decade.
- We will align sectoral and market opportunities with **strategic assets**, **technology**, **cluster** and **business strengths**.
- Using **research**, **trend analysis**, **future skills pipelines**, and **wider capabilities**, we will identify and target areas offering the **greatest growth potential** for NI.
- Our teams will also work with **partners** to ensure a future **UK Industrial Strategy** reflects the **sectoral and regional strengths**, as well as the needs of **our** business base.

A new Regional Model and Approach

- In line with the **Minister's Regional Economic Plan**, we will increase our **capacity**, **capability** and **functionality** across Northern Ireland to enhance economic development and realise the Minister's objective of regional balance.
- We will build our regional model from a 4 office model to a **5 office model**, to deliver services tailored to the needs of each region.
- This will include **increasing our staff resources** deployed in the regions by **40%,** to seek out and work with new businesses to help them to grow through innovation and exports.
- We recognise that we will only achieve true regional balance, through renewed and refreshed **purposeful partnerships** with business, stakeholders and partners across the North.

Invest Northern Ireland

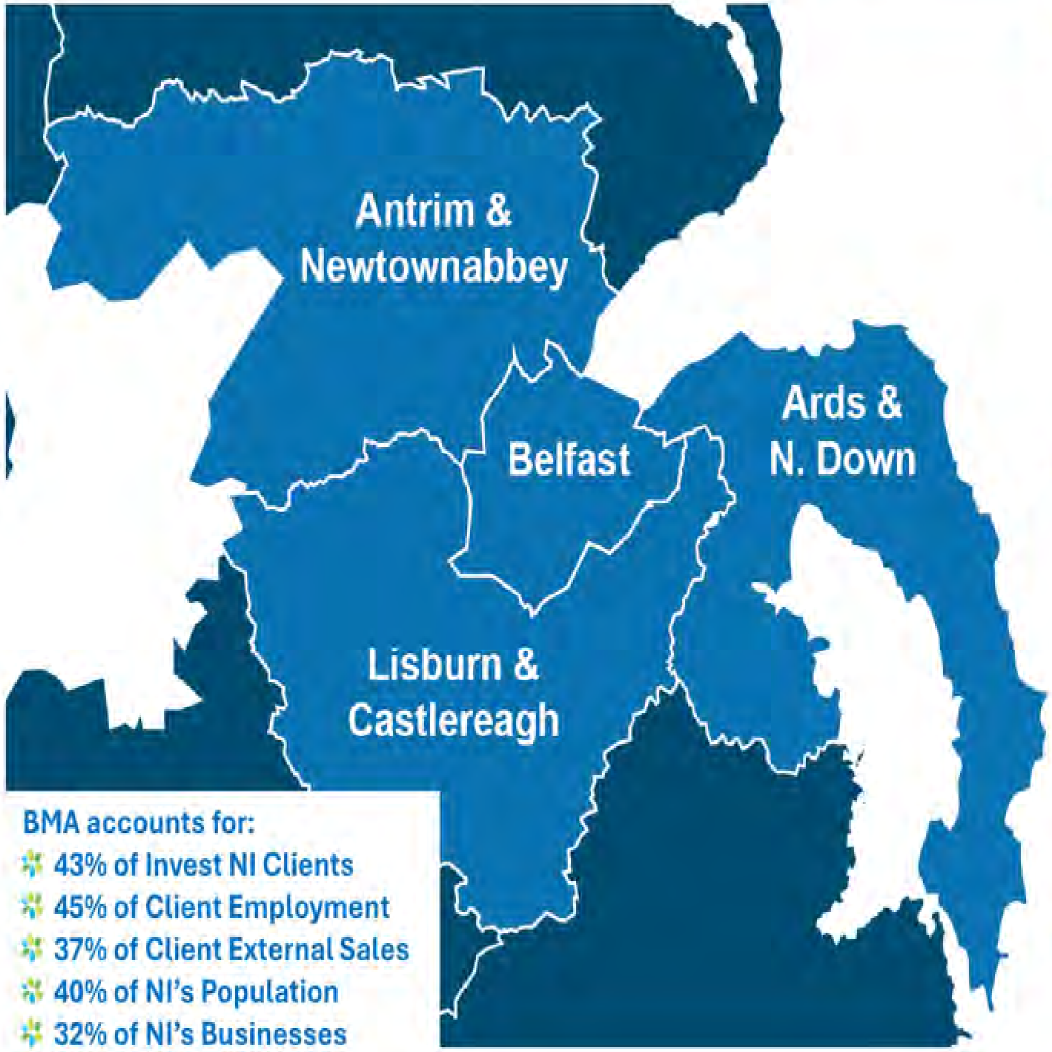
Regional Targets – Building Capacity outside of BMA

- We will target increased activity outside the **Belfast Metropolitan Area (BMA)** to help stimulate and support growth across our regions.
- Whilst we will seek to **boost business investment** across all areas, through our published corporate targets we will seek to increase our activity outside of Belfast Metropolitan area faster, **incentivising and supporting greater levels of investment**.
- This is the start of a **long-term commitment** to improving and enhancing economic outcomes **across Northern Ireland** working in **partnership and collaborating** with business and our partners to maximise impact.

Rest of NI accounts for:
- 57% of Invest NI Clients
- 55% of Client Employment
- 63% of Client External Sales
- 60% of NI's Population
- 68% of NI's Businesses

Invest Northern Ireland

Whilst retaining the Importance of BMA



BMA accounts for:

- 43% of Invest NI Clients
- 45% of Client Employment
- 37% of Client External Sales
- 40% of NI's Population
- 32% of NI's Businesses

- Building foundational capacity outside of the BMA **will not come at the expense** of the BMA.
- As our capital city **Belfast**, and its **adjacent areas**, remain the **economic engine** for the wider **Northern Ireland** region. Our targets **recognise this**, **retaining capacity** to assist and grow businesses located in the area.
- Many of our **largest employers**, **strategic assets**, **partners** and **universities** are based in the BMA. These will be **key** to facilitating wider future growth, and will attract **strategic investments**, in terms of numbers, value and jobs.
- We will be **acutely responsive** to the need to address **inequalities and disadvantage** present within the wider BMA through the investments we support in the area.
- A **collaborative partnership approach** will be key to achieve this.

Maximising City and Growth Deals

PROJECT	FUNDING
Cognitive Analytics & Digital Robotics Innovation Centre	£39M
SMART Derry Strabane Programme	£14.9M

PROJECT	FUNDING
Centre for Food & Drug Discovery	£22M
Business Innovation & Incubation Hub	£16.6M

PROJECT	FUNDING
Agri-Bio Innovation Centre (ABiC)	£25M
Robotics, Automation & Packaging Innovation Centre	£12.8M
Cam Seagoe Charlestown Innovation	£36.5M
Innovation Programme	£74.5M

PROJECT	FUNDING
Advanced Manufacturing Innovation Centre	£98M
iREACH Health	£62M
Momentum 1.0 / Global Innovation Institute	£68.1M
Centre for Digital Healthcare Technology	£40.1M
Augment the City SBRI Pilot Project	£1M
Belfast Equity Venture Fund	£20M
Innovation Challenge Fund Grants Programme	£20M
Innovation for Societal Impact / SBRI Programme	£14.3M
I4C Cleantech Centre	£24.1M
Design Smarter Digital Twin	£39.7M
Ards & North Down Innovation Hub (Shed 1.0)	£10.4M
Newry, Mourne & Down Innovation Hub	£3.5M

*'We will work with **project promoters**, **business**, **partners** and **stakeholders** to implement **City and Growth Deal projects** and utilise them as strategic vehicles to drive **sectoral and regional development** for the next decade'.*

Complementary Fund

PROJECT	FUNDING
Digital Transformation Flexible Fund	£7.5M
HyTech NI	£15M
Industrial Investment Challenge Fund	£7.5M

Related Strategic Project

PROJECT	FUNDING
Artificial Intelligence Collaboration Centre	£16.2M

Total Funding

c£690M

Invest Northern Ireland

Our Strategic Priorities

- Boosting Business Investment
- Developing and Achieving Sustainability
- Accelerating Innovation and Skills
- Maximising City and Growth Deals
- Driving Global Ambition
- Promoting Places and Partnerships

Invest Northern Ireland

Boosting Business Investment

Strategic Objectives – What outcomes are we targeting?

- *Support a minimum of **5,000 Productive Investments** in businesses totalling **£1.75bn** across NI (12% Uplift on 2023/24 Baseline).*
- *Increase **Full Time Equivalent (FTE) Employment** in **Invest NI's Client Portfolio** to **141,000** (8% Uplift on 2023 Baseline).*
- *Increase **Sales per Employee** in **Invest NI's Client Portfolio** to **£245,000** (14% Uplift on 2023 Baseline – Productivity Proxy).*

Invest Northern Ireland

Boosting Business Investment

Productive Investment and Good Jobs

Strategic Initiatives – How we will improve and enhance our delivery.

- *Launch bespoke **productivity** support to help businesses adopt new plant, equipment, technology and robotic and automated processes in the **Agri-Food & Drink processing** and **Manufacturing** and **Tradable services sectors**.*
- *Help businesses **challenge and streamline processes** to cut costs, boost efficiency and **drive productivity uplift**.*
- *Boost private sector investment by supplementing existing **Access to Finance** support for businesses.*
- *Grow employment in **Priority Sectors** with the greatest potential for Growth in **Good Jobs**.*

Invest Northern Ireland

Boosting Business Investment

Entrepreneurship and Enterprise

Strategic Initiatives – How we will improve and enhance our delivery.

- *Implement the **Massachusetts Institute of Technology Regional Entrepreneurship Acceleration Programme** recommendations and enhance delivery through a new **Entrepreneurship Team**.*
- *Work with Councils and Regional Partners to create a **'New to Invest NI' pipeline of Innovative Start-Ups and Established Businesses** with external growth potential.*
- *Invest in **Founder Labs** to boost the number of **Innovation Driven Start-Ups** providing our future **Innovation Driven Enterprises** (IDEs).*

Invest Northern Ireland

Boosting Business Investment

Supporting Metrics – Key outputs to support the achievement of our objectives.

- *Support at least **30** investments in businesses' **productivity capacity**, totalling **£250m** (new **Agri-Food Investment Initiative**).*
- *Support a minimum of **£50m productivity uplift** through **operational processes & supply chains enhancements**.*
- *Support at least **450 locally-owned companies** that are **'new to Invest NI'**.*
- Support **60 Innovation Driven Start-Ups** (External and Local IDSUs).

Invest Northern Ireland

Business Investment – Targeted at Productivity Drivers

Investment Targeted at Recognised Drivers of Productivity

Boosting Business Investment in the right areas, at the right time, in the right ways.

- External Sales & FDI
- Capital Investment & Good Jobs
- Innovation and R&D
- Leadership, Training & Skills
- Entrepreneurship & Enterprise
- Net Zero and the Green Economy

Prioritisation of Productivity

What?

We will put productivity at the centre of everything we do, with investments in the right areas, at the right time, in the right ways to maximise impact.

How?

Invest NI will continually assess our programmes and projects to make sure they contribute to recognised drivers of productivity. Our team will align our resources and functionality to help make this possible, developing targets and an approach to increase levels of 'Value Added per Full Time Employee (FTE)' in supported companies.

Why?

Closing the productivity gap between NI and the UK average has the potential to add around £7bn to our economy. We want to help all businesses become more productive through investing in efficient, automated and digitally-enhanced products, systems and processes.

Invest Northern Ireland

Accelerating Innovation and Skills

Strategic Objectives – What outcomes are we targeting?

- *Increase annual **R&D expenditure** within **Invest NI's Client Portfolio** to **£750m** (21% Uplift on 2023 Baseline).*
- *Increase the percentage of **Invest NI's Client Portfolio** that are **Innovation Active** to **80%** (5.5 percentage points increase on 2023 Baseline).*
- *Develop, baseline and target **Value Added per FTE** in **Invest NI's Client Portfolio**.*

Accelerating Innovation and Skills

Innovation Research and Development

Strategic Initiatives – How we will improve and enhance our delivery.

- *Use **Innovate NI** to drive **First Time Innovation** and help businesses become **innovation active**.*
- *Enhance and align our resources and functions to accelerate **digitalisation** with a focus on automation, digitisation, AI, and technology.*
- *Through purposeful partnership, establish **clear and streamlined pathways for all businesses** to progress innovation projects.*
- *Support **sustained, comprehensive innovation** to drive competitiveness, growth, and sustainability, emphasising non-financial support.*
- *Increase the number of **new businesses investing in R&D**.*
- *Enhance **R&D intensity**, commercialisation, collaboration, technology transfer and spillovers.*
- *Increase collaboration to maximise **commercialisation of innovation for businesses**.*

Accelerating Innovation and Skills

Leadership, Training and Skills

Strategic Initiatives – How we will improve and enhance our delivery.

- *Place **leadership, management, and skills development** at the centre of business growth plans.*
- *Drive a new approach to **leadership and management development**.*
- *Revamp our primary **Skills Development Programme** to increase its impact.*
- *Collaborate with partners to align **strategic talent pipelines** and address **current and future Skills needs**, such as through **Assured Skills Academies**.*
- *Enhance our strategic **collaborative growth programme** to support **collaboration**, establish **5 critical super-clusters**, and address regional challenges.*

Accelerating Innovation and Skills

Supporting Metrics – Key outputs to support the achievement of our objectives.

- *Support a minimum of **1,200 businesses** to become **innovation recognised**.*
- *Support at least **100 businesses** that are **new to R&D**.*
- *Support a minimum of **1,650** investments and **£435m** of investment in **research & development, innovation** and **digitalisation**.*
- *Support at least **475** investments and **£95m** of investment in **leadership, training** and **skills development**.*

Invest Northern Ireland

Driving Global Ambition

Strategic Objectives – What outcomes are we targeting?

- *Increase **External Sales** in **Invest NI's Client Portfolio** to **£25.75bn** per annum (16% Uplift on 2023 Baseline).*
- *Secure a minimum of **60 Externally-Owned expansion** investments for NI, and **60 investments** from **businesses 'new to NI'** (25% and 33% respectively Uplift on 2023/24 Baseline).*
- *Baseline then target **Expenditure in the Local Economy** through **Externally Owned Clients**.*

Driving Global Ambition

External Sales

Strategic Initiatives – How we will improve and enhance our delivery.

- *Prioritise **external sales** across Invest NI's activity and corporate performance framework.*
- *Simplify and clarify the **external sales support landscape** and **establish Invest NI's central role** as a single portal for end-to-end business support.*
- *Establish a clear **'pull-through model' of potential exporters** from partners and align our support network to accelerate their growth.*
- *Develop a new promotional campaign around **Dual Market Access** to encourage all businesses to sell into external markets.*
- *Drive an **all-island approach to trade development** with clear mutual benefits including through **joint trade and sales missions**.*

Driving Global Ambition

Foreign Direct Investment (FDI)

Strategic Initiatives – How we will improve and enhance our delivery.

- *Build on **Priority Sector** and **DMA research** to identify and win **high value, innovative FDI**.*
- *Exploit NI's **Dual Market Access** FDI potential.*
- *Target **financial support** at **strategic FDI Sectors** while promoting NI internationally through **non-financial support**.*
- *Develop a strategic **multi-site approach** to developing **Inward Investment** to maximise regional impact across NI.*
- *Work with **UK and Irish partners** to identify **collaborative ways to attract FDI** to address long-term structural economic challenges.*
- *Harness the global goodwill for NI through our **diaspora networks** to boost FDI and trade.*

Driving Global Ambition

Supporting Metrics – Key outputs to support the achievement of our objectives.

- *Support a minimum of **675** Investments and **£6m** of Investment in **Developing Businesses' Overseas Sales Capability**.*
- *Support a minimum of **1,000** Businesses to sell into **'New Markets'**.*
- *Support a minimum of **450** Businesses to sell **'Outside NI for the First Time'** (Sub-set of Companies New to Market).*

Invest Northern Ireland

Developing and Achieving Sustainability

Strategic Objectives – What outcomes are we targeting?

- *Support **575** investments in **Net Zero, Energy and Resource Efficiency Technologies** (ERET) (Sub-set of overall investments target – 12% uplift on Baseline).*
- *Establish a process to capture, baseline and then target the reduction of **Client Carbon Emissions** in our **Client Portfolio**.*
- *Establish a process to capture, baseline and then target the **Energy Intensity in our Client Portfolio**.*

Invest Northern Ireland

Developing and Achieving Sustainability

Strategic Initiatives – How we will improve and enhance our delivery.

- *Place **Net Zero at the centre of decision making**.*
- *Increase our **Net Zero and Green Economy** resources, capacity and capability.*
- *Accelerate the delivery of our **new Energy Efficiency Scheme** to enhance efforts to reduce business energy demand and carbon emissions.*
- *Maximise **Green Economy opportunities** by aligning provision, raising awareness, supporting market exploitation, and capitalising on additional green funding.*
- *Through our **Programme Evaluation and Appraisal** process, enhance our ability to meet **Net Zero** objectives.*

Developing and Achieving Sustainability

Supporting Metrics – Key outputs to support the achievement of our objectives.

- *Support **£26m** investment in **Net Zero, Energy and Resource Efficiency Technologies** (ERET).*
- *Develop **200 Sustainable Development Plans** with companies.*
- *Support at least **150** Investments by businesses to diversify into the **'Low Carbon and Green Economy'**, totalling **£100m** (Green Investments).*

Invest Northern Ireland

Maximising City and Growth Deals

Strategic Objectives – What outcomes are we targeting?

- *Oversee and support the successful delivery of the* ***City & Growth Deal (C&GD) and Complementary Fund (CF) Innovation & Digital projects****, representing around* ***£700m*** *of additional government supported investment for priority clusters.*
- *As* ***Investment Decision Maker*** *(IDM), help ensure strategic investments remain* ***commercially focused****,* ***industry relevant****, and* ***future-proofed*** *throughout their lifetime,* ***maximising wider benefits****,* ***spillovers and long-term outcomes.***

Maximising City and Growth Deals

Strategic Initiatives – How we will improve and enhance our delivery.

- *Oversee the delivery of **C&GD** and **CF Innovation & Digital projects** to support growth in priority clusters across NI.*
- *Help ensure **C&GD** and **CF Investments** remain **commercially focused**, **industry relevant** and **future-proofed**.*
- *Create **compelling sector and cluster propositions** that support positive engagement across all investments.*
- *Promote investments in **C&GD and CF projects** to **maximise regional impact**.*
- ***Focus our mainstream interventions** to help businesses deliver **commercial benefits**, generate **enhanced skills progression pathways**, and drive value-added economic growth.*

Maximising City and Growth Deals

Supporting Metrics – Key outputs to support the achievement of our objectives.

- *Support a minimum of **8 strategic Invest NI interventions** with C&GD or CF Projects.*
- *Leverage at least **£245m of investment** from C&GD or CF Projects.*
- *Support a minimum of **500 businesses** (including Prospective Clients and other businesses) **to engage with C&GD or CF Projects**.*
- Hold at least **25 events**, locally and internationally, to promote C&GD or CF Projects.

Invest Northern Ireland

Promoting Places and Partnerships

Strategic Objectives – What outcomes are we targeting?

- *By 2026/27, **65%** of Invest NI's Investments will be to businesses located **Outside of the Belfast Metropolitan Area** (2019/20 to 2023/24 5 Year average = 56%).*
- *Develop and implement a new **Invest NI Regional Approach**.*
- *Baseline and then target **Expenditure in the Local Economy** through **Locally-Owned** clients.*

Invest Northern Ireland

Promoting Places and Partnerships

Strategic Initiatives – How we will improve and enhance our delivery.

- *Factor **regional balance** into all investment decisions.*
- *Collaborate with DfE to develop and introduce an **NI Regional Economic Plan**.*
- *Develop an **Invest NI-specific regional plan** to enhance **capacity, capability, and functionality**.*
- *Promote **incentives** to encourage balanced regional activity and realise benefits.*
- *Develop a **new Regional Property Programme** to provide physical assets to support balanced economic development across NI.*

Invest Northern Ireland

Our People and Culture

- Develop our **People and Culture** to enable a relentless focus on **organisational excellence**.
- Conduct a **Cultural Assessment** including:
  - Survey
  - Focus groups
  - Consultation
- **Internal alignment** of strategic objectives and priorities with divisional and personal objectives.
- Commitment to **develop a Human Resources and Organisational Development Strategy.**
- Develop **new Corporate Values** to guide our **behaviours** for the next decade.

Share your feedback – Inform the Draft

- Complete our feedback survey available at the following link:

  https://www.smartsurvey.co.uk/s/BusinessStrategyFeedback/

- Or email Invest NI's Strategy Team: strategyteam@investni.com

Thank you.

Invest Northern Ireland

Completed feedback forms must be received no later than noon Thursday 14th November 2024.

Feedback received after this time and date will not be considered.

October 2024

Full name: Paul McCormick

Email Address: paul.mccormick@lisburncastlereagh.gov.uk

Are you:

- An individual
- An employer
- Representing a trade union
- Representing an industry or employer association
- Representing a charitable or community and voluntary organisation
- **Other (please specify):** Local Council

For employers and organisations only

Company/Organisation name: Lisburn & Castlereagh City Council

Are you content for the name of your company or organisation to be listed in an Annex to the Departmental Response?

The Annex will list the name of the company or organisation, but not the person who responded on its behalf.

- Yes
- No

If you are an individual, are you: N/A

- Employed
- Self-employed
- Unemployed
- Retired
- Not looking for work
- Other (please specify):

If you are in employment, what type of organisation do you work for:

- Private sector
- Public sector
- Charity/voluntary sector
- Other (please specify):

If you are in employment, how many people work for your organisation:

- Micro-business (0-9 employees)
- Small business (10-49 employees)
- Medium-sized business (50-249 employees)
- Large business (250+ employees)

If you are an employer, which sector do you operate in:

- Advanced Manufacturing & Engineering
- Agri-food & drink
- Construction
- Digital Technologies
- Financial, Professional & Business Services
- Life & Health Sciences
- Low Carbon & Green Tech
- **Other (please specify):** Public Sector

If you are an employer, are you locally, or externally owned: N/A

- Locally owned
- Externally owned

If you are an employer, which region are you mainly located in: Lisburn & Castlereagh

2. Draft consultation feedback

Does our Vision set a suitable level of ambition and successfully frame our shared destination for the Northern Ireland economy?

Positioning and resetting the scene for Invest NI is essential to building ongoing credibility and attracting investment. By placing local businesses at the core of its vision, Invest NI can ensure alignment with key economic development objectives, fostering growth and long-term prosperity.

As an entrepreneur, business leader, partner or stakeholder, does our Mission Statement appeal to you and does it convey what you need from Invest Northern Ireland?

As a local council, the mission statement resonates with several key economic development priorities, including supporting business growth, which complements the 11 councils' Go-Succeed Service.

The commitment to creating 'good quality jobs' and boosting productivity and skills, especially future skills for innovative businesses, aligns with the objectives of the

Lisburn & Castlereagh Labour Market Partnership: going forward we must ensure that local businesses have the talent needed to thrive in evolving industries.

Inward investment is a priority for LCCC, attracting new businesses and capital is important for the area's long term economic development. Additionally, the emphasis on environmental sustainability aligns with the council's broader focus, reinforcing shared goals for a greener, more prosperous future.

3. Does the overall strategy feel right? Are there any major omissions?

Are there areas of focus that need to be added?

Infrastructure: Economic growth relies on the existence of strong supporting infrastructure, including wastewater, energy, transport, and digital connectivity. The success of the new strategy will hinge in part on Invest NI's ability to influence the responsible Departments and organisations to address the local infrastructure deficit, particularly with regard to the opening of new lands for industrial development, business and employment purposes. This presents an opportunity for Invest NI to strengthen its alignment with local council priorities and departments such as DfI to enhance regional economic resilience.

Tourism: In the Lisburn & Castlereagh area, tourism is becoming more significant and holds future potential in driving local economic development. Recognising this sector more fully in the strategy, particularly through support for key tourism businesses and highlighting strategic linkages to other strategies and organisations would support councils that are keen to engage tourism as a key part of their future economic vitality and growth.

Are there areas that should be removed or are no longer relevant?

No area to be removed.

4. Targets (Slide 5)

Are the draft targets the correct ones to deliver maximum impact?

Overall, these targets are ambitious and well defined, covering key areas that can drive significant economic impact. Further considers may be given to:

Increase Sales per Employee in our Client Portfolio to £245k (Up 14%):

While the target to increase sales per employee to £245k (up 14%) is commendable and emphasises the importance of improving productivity, it presents particular challenges for the Lisburn & Castlereagh area. Although Invest NI's focus is on its client portfolio, which tends to consist of larger companies, the region itself still requires support to address productivity levels across a broader business landscape.

Many businesses in Lisburn & Castlereagh belong to sectors such as retail & hospitality, agri-food, construction, and traditional SMEs in manufacturing, services, and trades. These sectors typically do not achieve productivity gains at the same rate as larger, more capital-intensive industries, mainly due to factors such as limited resources, slower adoption of new technologies, and investment constraints. This can impede their ability to increase productivity without substantial external support.

To ensure that these productivity targets are realistic and achievable across the region, we recommend that Invest NI leverage the sub-regional plan strategy to consider the unique business makeup of different areas when setting these targets. Offering flexible, tailored assistance to sectors that may find it more challenging to meet productivity goals will be crucial. This support could include more focused efforts in areas such as digital transformation, training, innovation/operational efficiency particularly in sectors that have been slower to embrace these changes.

By recognising the diverse economic makeup of regions like Lisburn & Castlereagh, Invest NI can ensure that the productivity targets are achievable and inclusive, driving growth across all business sectors.

<u>Support 575 Investments in Net Zero, Energy & Resource Efficiency Technologies (Up 12%)</u>

Whilst this aligns well with both public and private sector sustainability priorities and the green economy, it will be more beneficial if this extends out to a wide range of businesses, sector and SMEs.

<u>By 2026/27 65% of our investments will be 'Outside of the BMA - Up 6 pps</u>

This target has the potential to disadvantage the Lisburn & Castlereagh area, which, despite being part of the BMA, has historically not benefited from the same level of investment as say Belfast City. Economically, Lisburn & Castlereagh faces similar challenges to regions outside of the BMA, in terms of attracting the necessary investment to support business growth and infrastructure development. Any potential reduction in investment focus may risk exacerbating existing disparities and hinder the full realisation of the local economy's potential.

The Lisburn & Castlereagh area offers a strong foundation for continued economic growth, with a diverse mix of indigenous businesses and international companies, high levels of skills and employment, and significant land availability for further development. These factors position the area as a key driver of future economic expansion. Any potential reduction in support to this region could risk stalling its progress, and limiting its ability to compete both regionally and internationally. Sustained investment is essential to unlock the area's full potential, fostering innovation, enhancing infrastructure, and supporting long-term job creation.

We encourage Invest NI to adopt a considered approach within the BMA, ensuring areas like Lisburn & Castlereagh, are given equitable consideration.

Are there gaps that you feel should be directly addressed?

With the focus on supporting 450 local companies new to Invest NI, this may bring about the potential for overlap with the council's Go-Succeed service, especially if the target audiences of the two programmes align closely. A couple of options to consider would for example be to clearly define roles (early-stage start-up, SME, growth, etc.) and/or more clarity around the proposed regional focus.

5. Client Definition and engagement model (Slide 7 and 8)

Is a client model approach, that enables us to prioritise resources and intensify support with those businesses with the greatest growth potential, the correct approach?

A client model approach that prioritises resources and intensifies support for businesses with the greatest growth potential can be highly effective.

Many businesses in Lisburn & Castlereagh operate in sectors such as retail and hospitality, agri-food, construction, and traditional SMEs in manufacturing, services, and trades. While these sectors might not meet the threshold for Invest NI's client model, they would benefit greatly from sub-regional support. A balanced approach that incorporates targeted support for these sectors, alongside the client model, would ensure more inclusive and sustainable regional economic growth.

Is the definition and engagement model sufficiently broad to enable us to deliver for all businesses strategically?

In 2023, Invest NI supported 106 companies in the Lisburn & Castlereagh area, demonstrating its commitment to fostering local business growth. While the engagement model is on the right track, to deliver strategically for all businesses, it should be flexible enough to address sectoral and regional variations and sit within a clearly defined framework of regional assistance that provides a recognised pipeline of support that is clearly communicated and easily accessible and understandable.

6. Priority sectors (Slide 9)

Do you agree that the priority sectors identified are the correct ones to focus on?

Lisburn & Castlereagh City Council would see these areas as representative of the Northern Ireland economy with potential for new innovation coming through in the carbon tech and digital sectors. They also align with council policy around innovation and sustainability.

Which market opportunities or technologies do you believe present the greatest challenge for you over the long term?

As is likely the case across Northern Ireland, local businesses face challenges including, sustainability pressures (including demands from buyers), automations & digital transformation, a limited skills pool, and cybersecurity concerns.

7. Strategic Priorities - Boosting Business Investment

Do you agree with the strategic objective?

Yes, boosting business investment is essential for driving economic growth, increasing competitiveness, and fostering innovation.

Do you feel that the proposed changes will address the specific challenges in your region, or are there any additional priorities you would like to see addressed?

Whilst the proposed changes are a positive step in addressing the region's challenges, more focus is needed on infrastructure development—specifically transport links to unlock the economic potential of Lisburn & Castlereagh.

Key projects such as the Knockmore M1 Link Road and addressing infrastructure deficits in areas such as energy supply and wastewater systems are crucial. Also opening up land for development, especially high-quality industrial land, will provide much-needed space for businesses to expand and attract new investment.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Invest NI should adopt a parallel focus on infrastructure, particularly transport links and digital connectivity, as both are critical for enabling business growth and attracting investment.

Industrial and commercial development often depends on access to energy, electricity, water, and wastewater systems. Invest NI should collaborate closely with the relevant third parties to improve infrastructure, particularly in regions identified for industrial and commercial growth.

8. Strategic Priorities - Accelerating Innovation & Skills

Do you agree with the strategic objective?

Yes, accelerating innovation and skills development is vital for the long-term competitiveness of businesses.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Digital skills development across all sectors, including support for SMEs in adopting digital tools and innovation.

Partnering with educational institutions to create a steady pipeline of talent for high-growth sectors such as technology, green energy, and advanced manufacturing.

9. Strategic Priorities - Driving Global Ambition

Do you agree with the strategic objective?

Yes, driving global ambition is important for route to market, exporting, and attracting FDI to NI.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Continue building global partnerships to enhance Northern Ireland's visibility and competitiveness such as the Canadian Advisory Council, focusing on Agri-tech, advanced manufacturing & engineering, fintech and financial services sectors. With a focus on high-potential sectors such as technology and green energy.

10. Strategic Priorities - Developing and Achieving Sustainability

Do you agree with the strategic objective?

Yes, developing and achieving sustainability is essential for long-term economic resilience and aligning with local government and global climate goals.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Supporting businesses in transitioning to low-carbon operations.

Green innovation and investment in renewable energy technologies.

Develop and build on decarbonisation efforts, in particular the work being undertaken through Invest NI Industrial Decarbonisation - Northern Ireland (IDNI) initiative that has identified key clusters across Northern Ireland.

11. Strategic Priorities - Maximising City and Growth Deals

Do you agree with the strategic objective?

Yes, critical for regional development and ensuring that joined up investment benefits all.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Supporting infrastructure development to support regional connectivity and business growth, including the Knockmore M1 Link Road and other key infrastructure projects.

Tailored support for local industries to ensure that growth deals benefit diverse sectors and regions.

12. Strategic Priorities - Promoting Places and Partnerships

Do you agree with the strategic objective?

Yes, promoting places and partnerships is key for regional economic cohesion, and building collaboration.

Are there any specific areas of focus that you think Invest Northern Ireland should prioritise under this Priority?

Building strong partnerships between local authorities, businesses, and educational institutions to drive regional growth.

Promoting tourism and cultural assets to strengthen regional economies.

Creating place-based strategies that reflect the unique strengths and opportunities of each region.

13. Additional Comments

Do you have any other comments that you wish to make?

Lisburn & Castlereagh City Council

Committee:	Regeneration & Growth Committee
Date:	7 November 2024
Report from:	Head of Economic Development

Item for:	Noting
Subject:	LCCC Labour Market Partnership (LMP) Job Fairs

1.0 **Background**

1. The Council has been working with the Lisburn and Castlereagh Labour Market Partnership in the design and development of a strategy for the next three years.

2. At the previous Committee meeting held in September, the Committee agreed to note the final Labour Market Partnership Action Plan 2024/2025 and agreed that the associated projects would proceed to delivery once the necessary letter of offer was received.

Key Issues

1. The approved action plan includes strategic priority 3, which is to promote and support delivery of existing employability or skills provision available either regionally or locally.

2. This can involve a range of events to include employer engagements/education, apprenticeships, partner events and local job fairs.

3. It is anticipated that under the action plan 2024/25, a minimum of four events will be delivered to include two job fairs and two other industry specific events eg female returners, disability inclusion, business start.

4. The next events are scheduled as follows:

   Dundonald International Ice Bowl – Thursday 21st November 2024, 10.30am to 2.30pm. This will focus on employability, primarily within the Castlereagh area. It is the second time the LMP will be delivering a Job Fair in this location and we hope to build on last year's success (25 Exhibitors)

   Lagan Valley LeisurePlex - Thursday 27th February 2025, 10.30am to 2.30pm. This will focus on employability, primarily within the Lisburn area. Last year's event was one of the largest Job Fairs throughout all the LMPs, with very good attendance from local employers and schools (70 Exhibitors)

2.0 **Recommendation**

It is recommended that the Committee notes the update and promotes the events across their constituency networks to maximise interest and impact.

3.0 **Finance and Resource Implications**

The Job Fairs are fully funded by the Department for Communities (DfC) under the Lisburn Castlereagh LMP Action Plan 2024/25, as previously agreed.

4.0	**<u>Equality/Good Relations and Rural Needs Impact Assessments</u>**	
4.1	Has an equality and good relations screening been carried out?	Yes
4.2	Brief summary of the key issues identified and proposed mitigating actions **<u>or</u>** rationale why the screening was not carried out It has been concluded that a detailed equality impact assessment is not necessary as all the potential impacts identified are minor and positive.	
4.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	Yes
4.4	Brief summary of the key issues identified and proposed mitigating actions **<u>or</u>** rationale why the screening was not carried out. The LMP has been developed in order improve employability conditions for those who are economically inactive or unemployed regardless of their urban/rural location.	

Appendices:

Lisburn & Castlereagh City Council

Committee:	Regeneration & Growth
Date:	7 November 2024
Report from:	Head of Economic Development

Item for:	Decision
Subject:	Northern Ireland Tourism Alliance – correspondence requesting support

1.0 **Background**

1. Correspondence has been received by the Council from the Northern Ireland Tourism Alliance (NITA) seeking support for a letter to be sent to the UK Minister for Immigration and Citizenship, Seema Malhotra MP, raising concerns around the proposed roll-out of the Electronic Travel Authorisation (ETA). This is a new arrangement that will be required for those travelling to the UK including Northern Ireland.

2. NITA is an organisation that represents the tourism and hospitality sector in Northern Ireland. Led by industry, NITA was established in 2018. It provides a single representative body and unified voice for tourism in Northern Ireland. NITA's role is to represent its membership to all levels of government, to influence the growth of tourism in Northern Ireland. The Council is a member of NITA.

Key Issues

1. NITA states in the letter that its primary concern is the adverse effect the ETA will have on the 70% of international visitors who enter Northern Ireland via the land border with the Republic of Ireland. NITA argues that the anticipated administrative burden and legal uncertainties that this measure will introduce are likely to cause a significant decline in visitor numbers.

2. The letter of concern, which is appended to this report, was received by the Council on 31 October 2024, and was sent on 6 November 2024 prior to a meeting between the Northern Ireland Minister for Economy, Conor Murphy, and the UK Minister for Immigration and Citizenship, scheduled for 13 November 2024.

3. The request for support was received too late for inclusion in the initial upload of reports for the November Committee. NITA has asked Councils who were not able to consider or agree to co-sign the letter to the UK Minister to draft their own letter articulating the concerns raised regarding the ETA and the predicted likely impact this will have on the tourism economy across Northen Ireland.

2.0 **Recommendation**

It is recommended that Members consider the request from the Northern Ireland Tourism Alliance and provide appropriate guidance to officers in this regard.

3.0	**Finance and Resource Implications**	
	None	
4.0	**Equality/Good Relations and Rural Needs Impact Assessments**	
4.1	Has an equality and good relations screening been carried out?	No
4.2	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out To be considered post Committee decision.	
4.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	No
4.4	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out. To be considered post Committee decision.	

Appendices: Appendix 5 - Letter to Minister Malhortra, Minister for Immigration and Citizenship nita northern ireland tourism alliance

Seema Malhotra, MP,
Minister for Immigration and Citizenship
Home Office,
2 Marsham Street,
London, SW1P 4DF

Dear Minister Malhotra,

The Northern Ireland Tourism Alliance (NITA) represents the diverse sectors that drive the tourism economy in Northern Ireland. On behalf of our members, we are writing to express our serious concerns regarding the economic impact of the upcoming Electronic Travel Authorisation (ETA) requirement.

Our primary concern is the adverse effect the ETA will have on the 70% of international visitors[1] who enter Northern Ireland via the land border. The anticipated administrative burden and legal uncertainties this measure introduces risks a significant decline in visitor numbers. This trend is already evident, with tour operators beginning to exclude Northern Ireland from their itineraries starting for 2025.

Tourism is one of the six key areas of cooperation outlined in the Good Friday Agreement. For over 20 years, Tourism Ireland has promoted Northern Ireland overseas as part of a single, unified Island of Ireland destination, supported by more than £1 billion in cross-border promotional investment. In the current economic climate, with the cost-of-living crisis impacting domestic markets, international tourism is essential to sustaining and growing our industry. Our sector has shown resilience, emerging from the pandemic with determination to recover and expand. However, seamless travel within the island of Ireland is critical, and the introduction of the ETA for major international markets, such as the USA and Europe, places 20% of total tourism spend—amounting to approximately £200-£250 million—at considerable risk.

It's important to note that this estimate does not fully account for the economic impact of day trips, which are not consistently reported for Northern Ireland. Given the short distance from Dublin to Belfast, many independent travellers and tour operators include Northern Ireland as a key day-trip destination. NITA anticipates that such day trips would be the first casualty should the ETA become mandatory for border crossings.

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[1] promotable visitors include holiday makers, those visiting family and friends, conference, trade/fair/exhibition including those travelling as part of a tour group or travelling independently.

This situation is unsustainable, especially given increased business costs, including higher Employer National Insurance Contributions, lower thresholds for contributions, and a rising National Living Wage. Tourism businesses must be given the opportunity to maximise turnover and profitability to sustain and create jobs. Spending by international tourists far exceeds that of visitors from domestic markets, and we must avoid erecting barriers that could dissuade these high-value travellers from visiting Northern Ireland.

Northern Ireland is unique within the UK, sharing the only UK land border with an EU member state. Many overseas visitors are unaware that Ireland comprises two jurisdictions and may not realise they are crossing into the UK when they travel to Northern Ireland. There are no visible immigration checks at the border, and visitors will not be alerted to the ETA requirement. However, under the current legislation, visitors who unknowingly fail to obtain an ETA face serious legal consequences.

The tourism industry in Northern Ireland, represented by NITA, is united in its opposition to the ETA requirement for the small numbers (in UK terms) crossing the land border into Northern Ireland. We believe that tourism in Northern Ireland is an unintended casualty of this legislation, and we proposed a targeted solution to the previous government. This proposal, which advocates for an exemption for non-visa national visitors entering Northern Ireland via the land border, garnered support from the Shadow Secretary of State, at the time, and all Northern Ireland political parties. Additionally, we have received support from the House of Lords Justice and Home Affairs Committee and the British Irish Parliamentary Assembly, all recognising the impact on tourism and the need for a solution that preserves seamless travel.[2]

We welcome your planned meeting with the NI Minister for the Economy, Conor Muphy MLA, on 13th November 2024, and we urgently request your serious consideration of our proposed exemption.

With the ETA rollout imminent, swift action is essential to safeguard the tourism industry and economy of Northern Ireland from unintended consequences.

Yours sincerely,

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[2] House of Lords Justice and Home Affairs Committee Inquiry
https://committees.parliament.uk/publications/44826/documents/222689/default/
British Irish Parliamentary Assembly report - British-Irish Parliamentary Assembly | 63rd British-Irish Parliamentary

Agenda

Lisburn & Castlereagh City Council

Committee:	Regeneration and Growth
Date:	7 November 2024
Report from:	Director of Regeneration and Growth

CONFIDENTIAL REPORT

Reason why the report is confidential:	Information relating to the financial or business affairs of any particular person (including the Council holding that information).
When will the report become available:	
When will a redacted report become available:	***Following ratification at Council***
The report will never become available:	

Item for:	Decision
Subject:	Event Marquees Business case

1.0 **Background**

1. The Council is required to hire marquees to facilitate the delivery of a programme of events across the Council area. These events, which attract visitors to the Lisburn & Castlereagh area, include a number of artisan markets across the year, Twilight Nights, Lisburn Light Festival events and the Balmoral show.

2. The current tender for marquees reached financial end in September and officers are now required to retender for the delivery of marquees and associated infrastructure such as flooring, lighting, heating, staging etc, to ensure the continuation of the delivery of a successful events programme.

3. The business case attached (see Appendix) provides Members with the background for the expenditure, outlines the business need and recommends the preferred option.

2.0 **Key Issues**

1. It is proposed to go out to tender to secure a suitable marquee provider on a 1 year + 1 + 1 basis with an initial contract for the first year only.

2. The costs presented in the business case are based on the costs incurred over the last 3 years across Regeneration and Growth and Leisure and Well-being directorates.

	3. [redacted].	
	Recommendation It is recommended that Members consider and agree the attached business case and the procurement of a suitable provider for a 3 year period (1+1+1), with an initial contract for the first year only.	
4.0	**Finance and Resource Implications** The preferred option will be 100% funded from the Council from Regeneration and Growth, Parks and Leisure and Tourism Events estimates. Tourism [redacted] City Centre Management [redacted] Parks & Amenities [redacted] The Island Arts [redacted] Contingency [redacted]	
5.0	**Equality/Good Relations and Rural Needs Impact Assessments**	
5.1	Has an equality and good relations screening been carried out?	No
5.2	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out. The business case/ procurement exercise has not been screened, all events which require a marquee through the procured contract will be Equality Screened at programme level, including all light installations as part of the Lisburn lights festival.	
5.3	Has a Rural Needs Impact Assessment (RNIA) been completed?	No
5.4	Brief summary of the key issues identified and proposed mitigating actions **or** rationale why the screening was not carried out. The Rural Needs assessments will be undertaken at programme level, including all light installations as part of the Lisburn lights festival.	

Appendices:	Appendix 2 [redacted]