Invest Northern Ireland

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

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

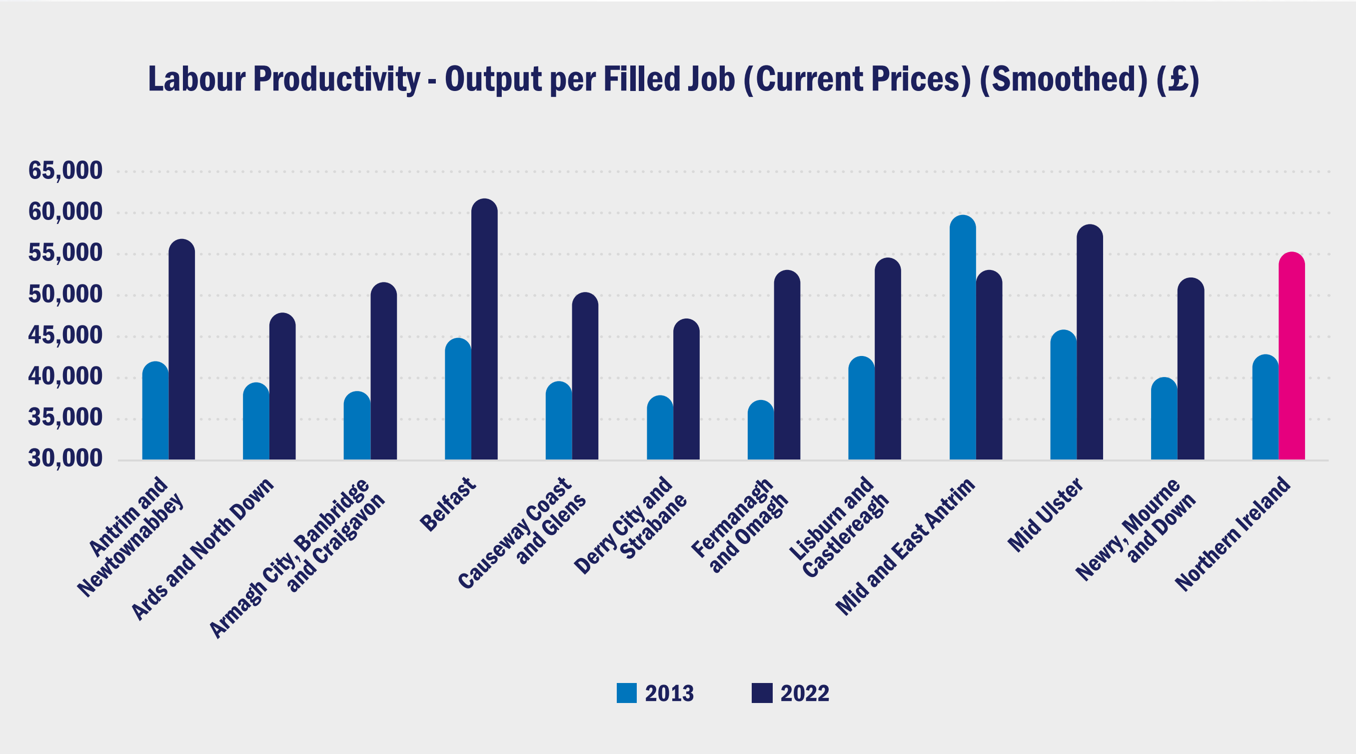
To further explore the extent of the disparities evidenced at a local level, a series of economic indicators were selected to create a comparable dataset, to show a holistic snapshot of the Northern Ireland economic landscape. The rationale for the selection is detailed further in Section 2. They have 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%).

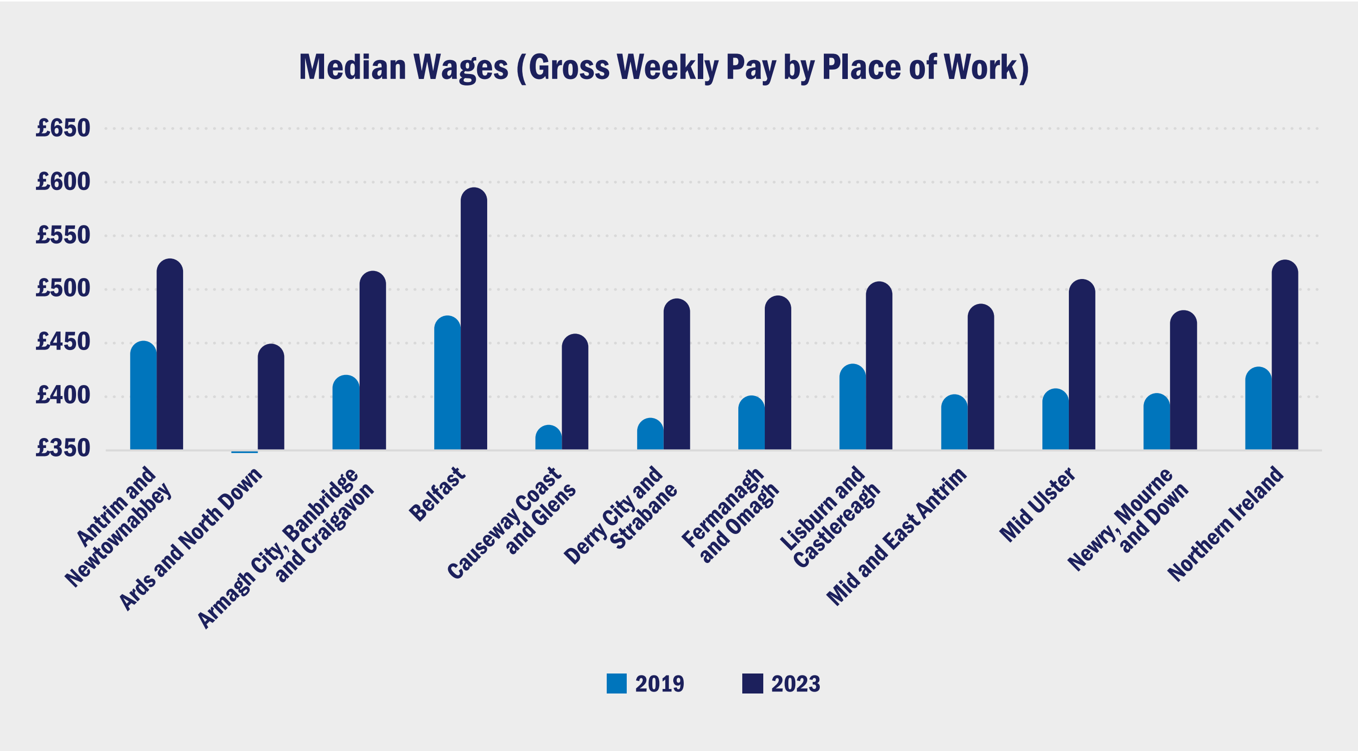
Belfast and Mid Ulster have consistently been above the NI Average and are the only Local Government Districts (LGDs) where productivity is comparable to the UK average. The position of most other LGDs relative to the NI average has remained broadly unchanged with the exception of Mid and East Antrim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

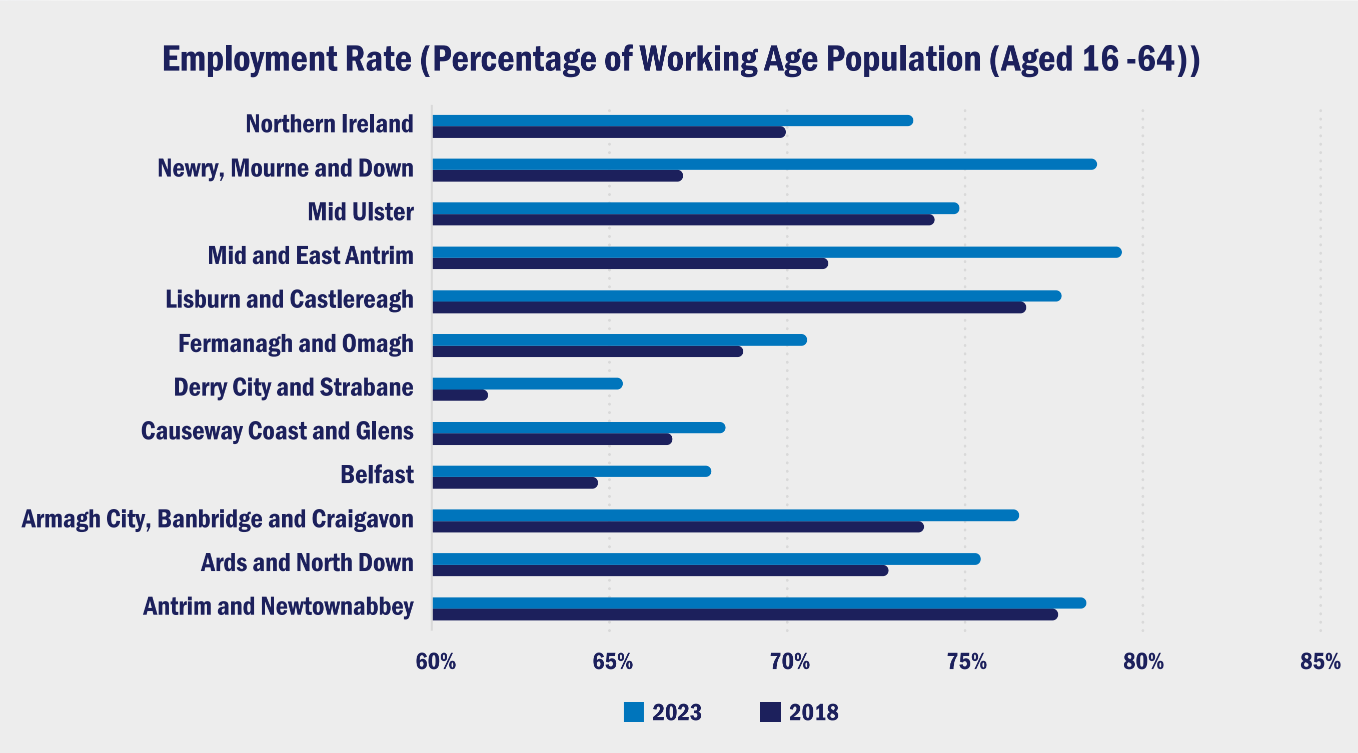
From 2019 to 2023, median pay growth was largest in Ards & North Down (29.5%) and Derry City Strabane (29.3%), albeit from low baseline earnings levels. The rate growth over this period was comparable in Belfast (25.2%) although its median pay in 2019 was significantly higher than any other LGD. Antrim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

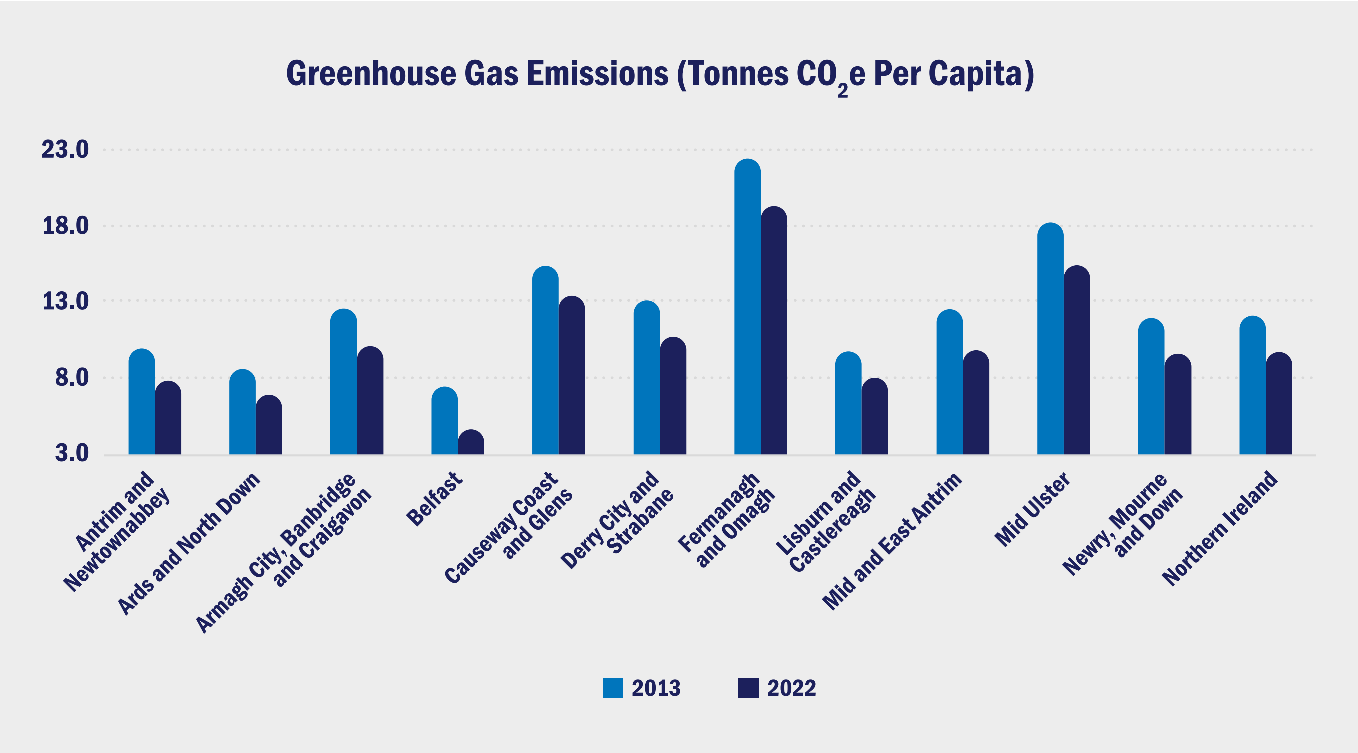
In 2023, 7 out of 11 LGDs exceeded the regional average employment rate (73.6%) with Mid & East Antrim ranked the highest with 79.5%. Derry City & Strabane had the lowest rate at 64.4%.

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 Lowest Performing: Fermanagh & Omagh 19.4 NI Average: 9.8 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.	Highest Performing: Fermanagh & Omagh 24.4 Lowest Performing: Belfast 0.1 NI Average: 5.6 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

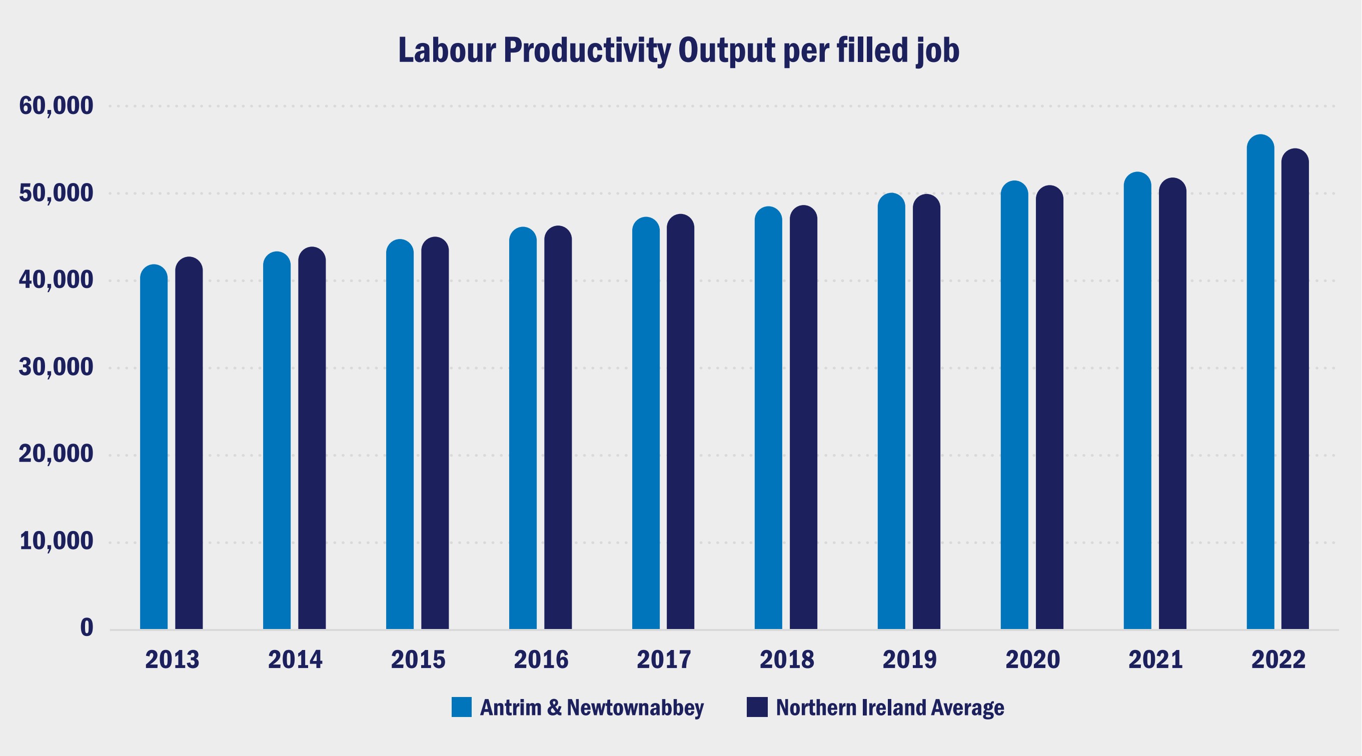
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	3	78.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	3	19.8%	24.7%
Gross Domestic Household Income (per head, 2021)	3	£17,960	£17,636
Tertiary Education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

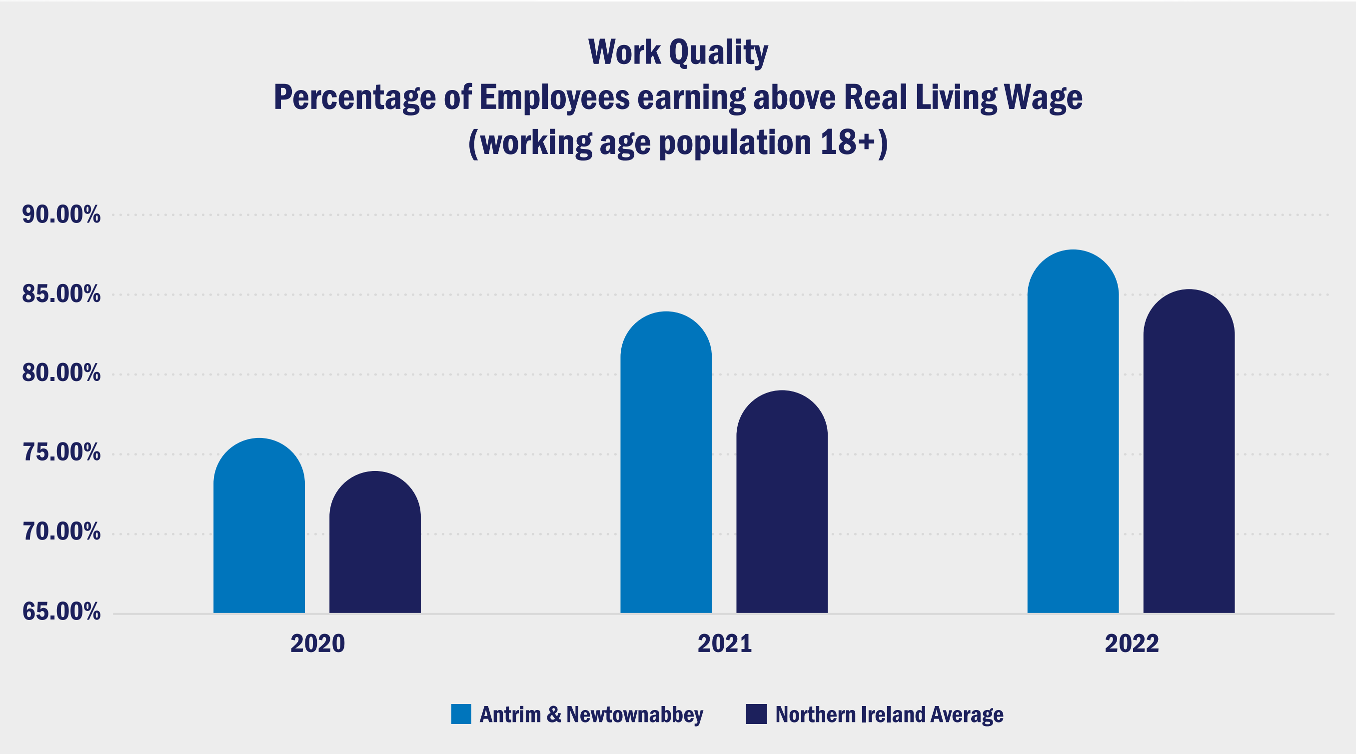
Raise Productivity



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.

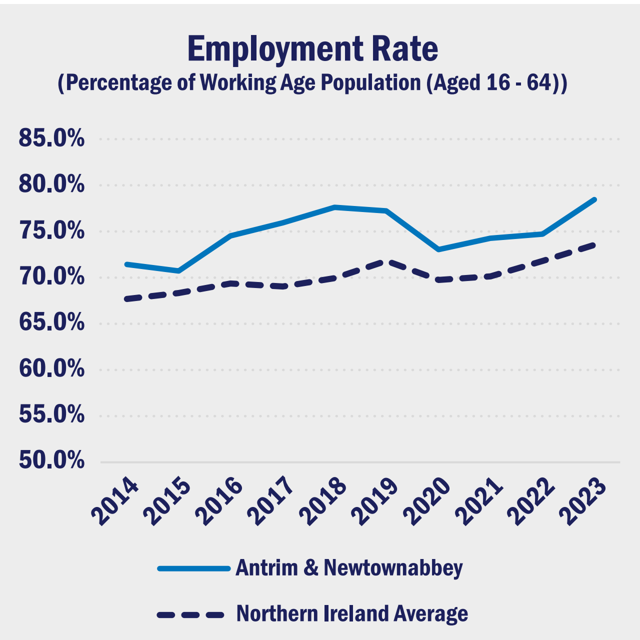
Good Jobs

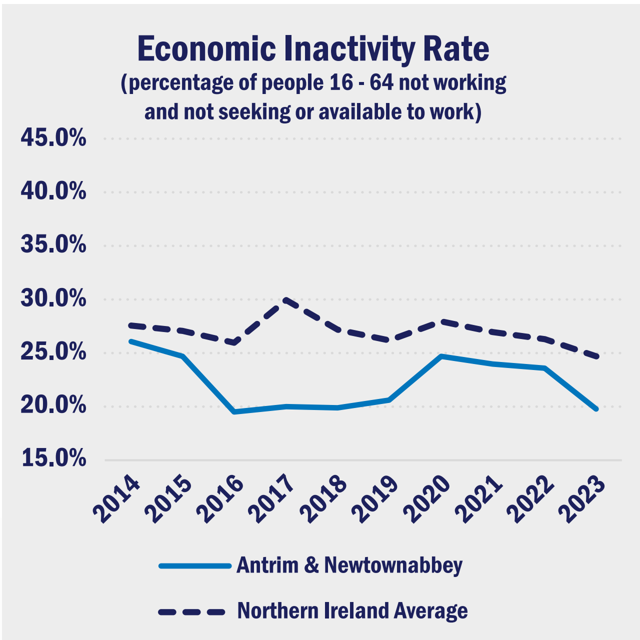


Source: Labour Force Survey, NISRA

- **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

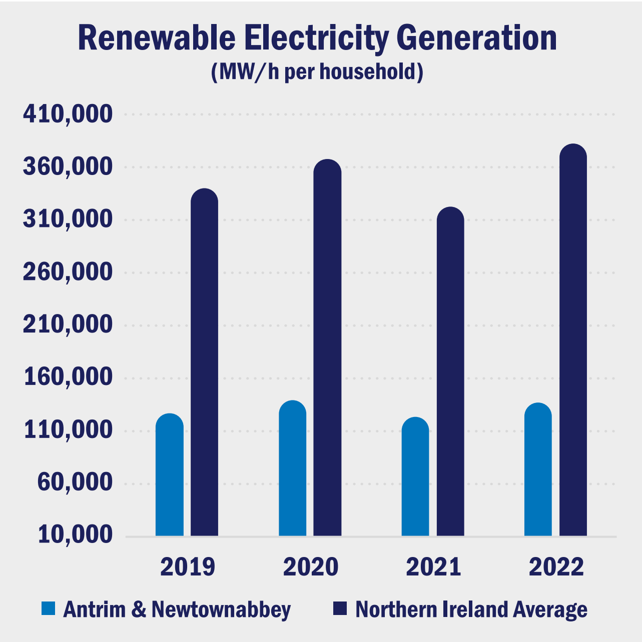


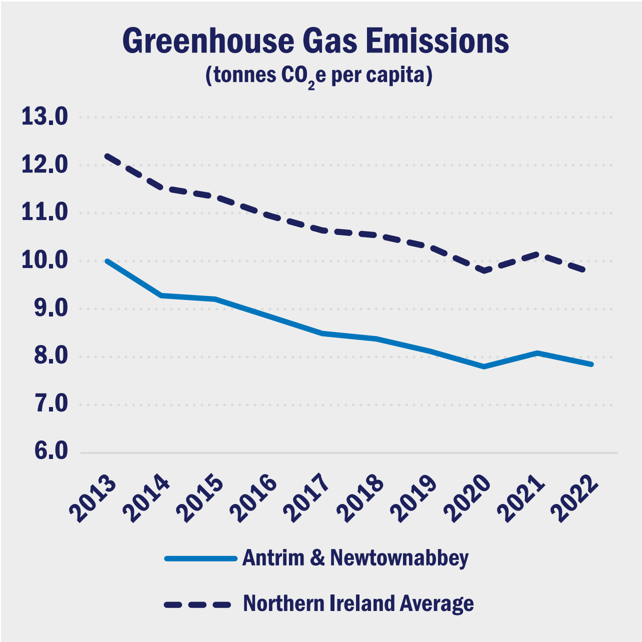


Source: Labour Force Survey, NISRA

- **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

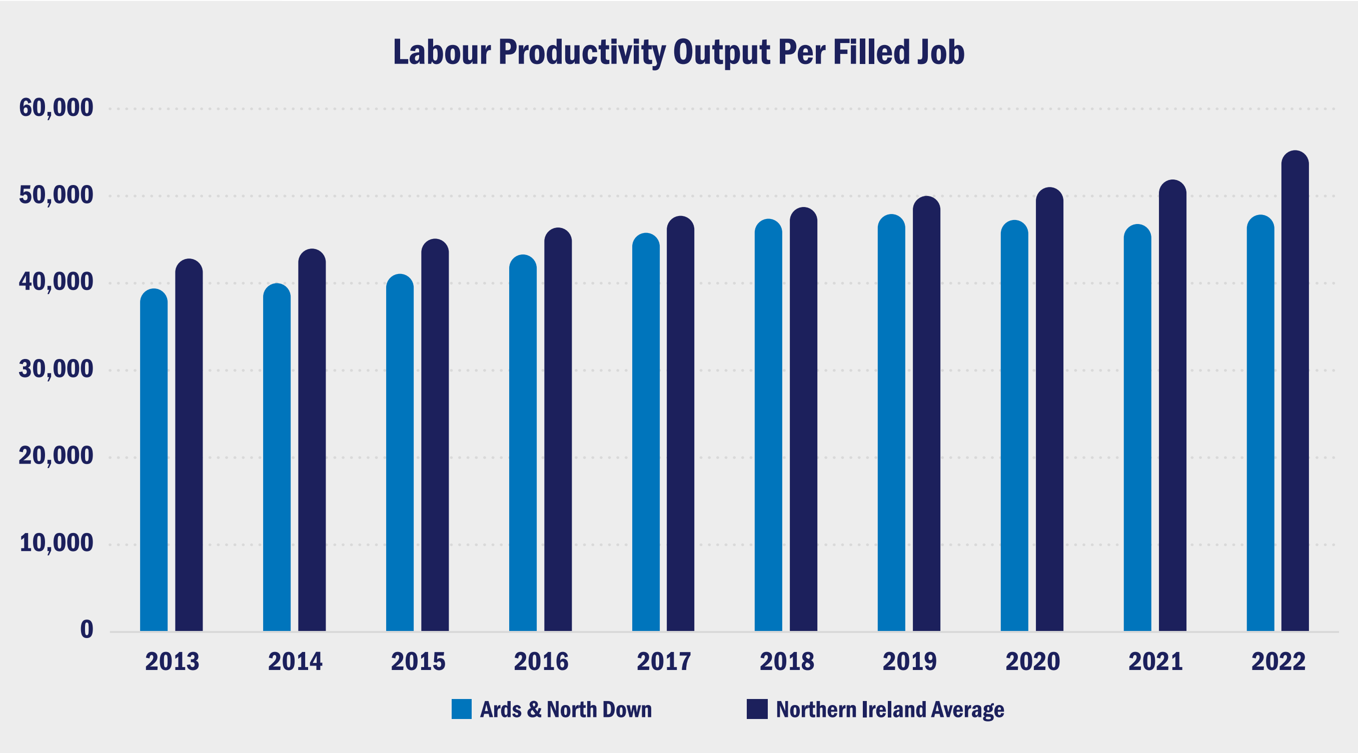
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	6	75.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	7	23.6%	24.7%
Gross Domestic Household Income (per head, 2021)	2	£19,108	£17,636
Tertiary Education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

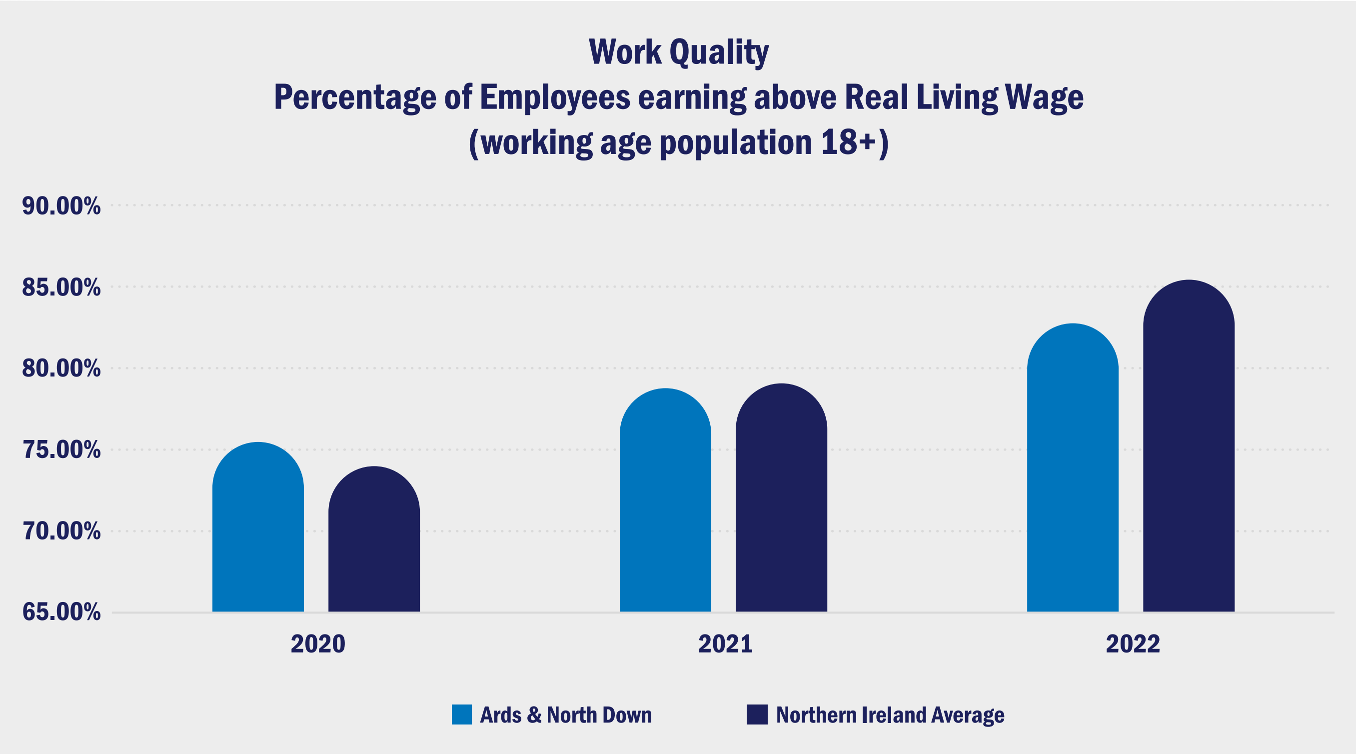
Raise Productivity



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%.

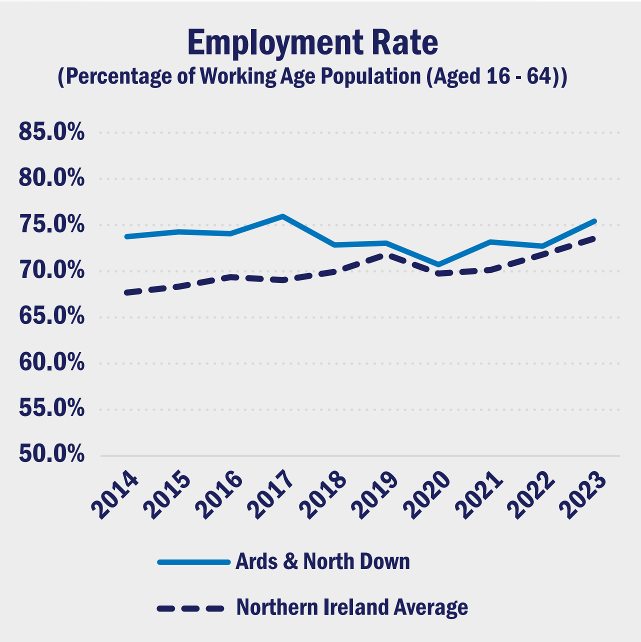
Good Jobs

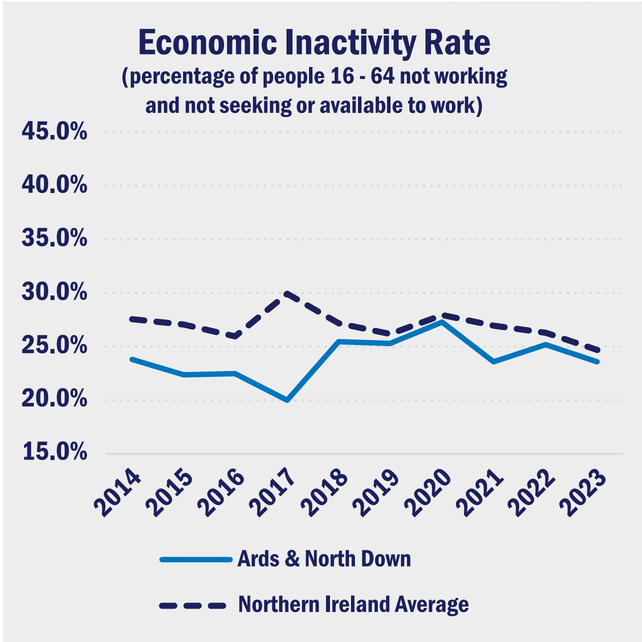


Source: Labour Force Survey, NISRA

- **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

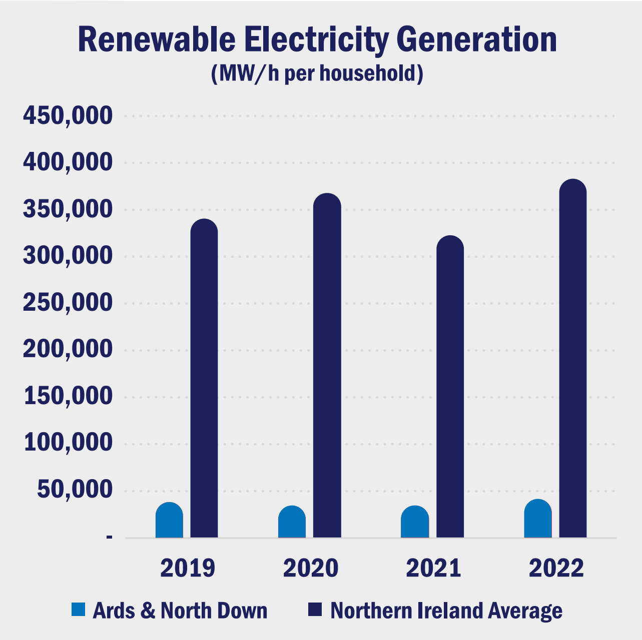


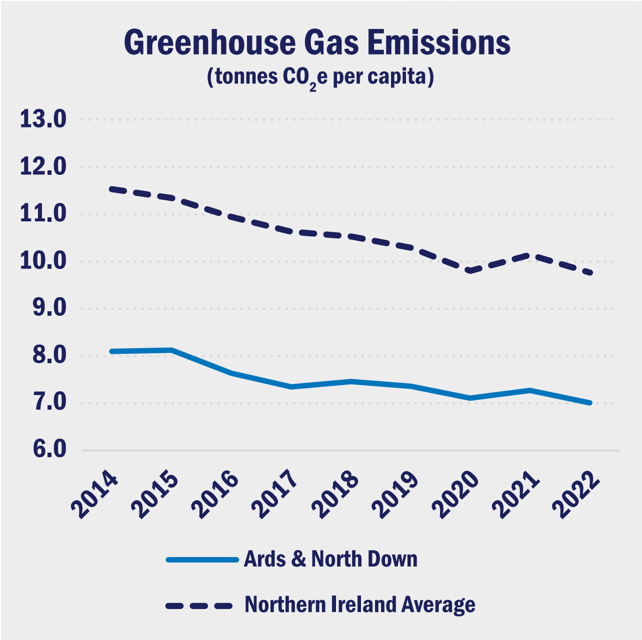


Source: Labour Force Survey, NISRA

- **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

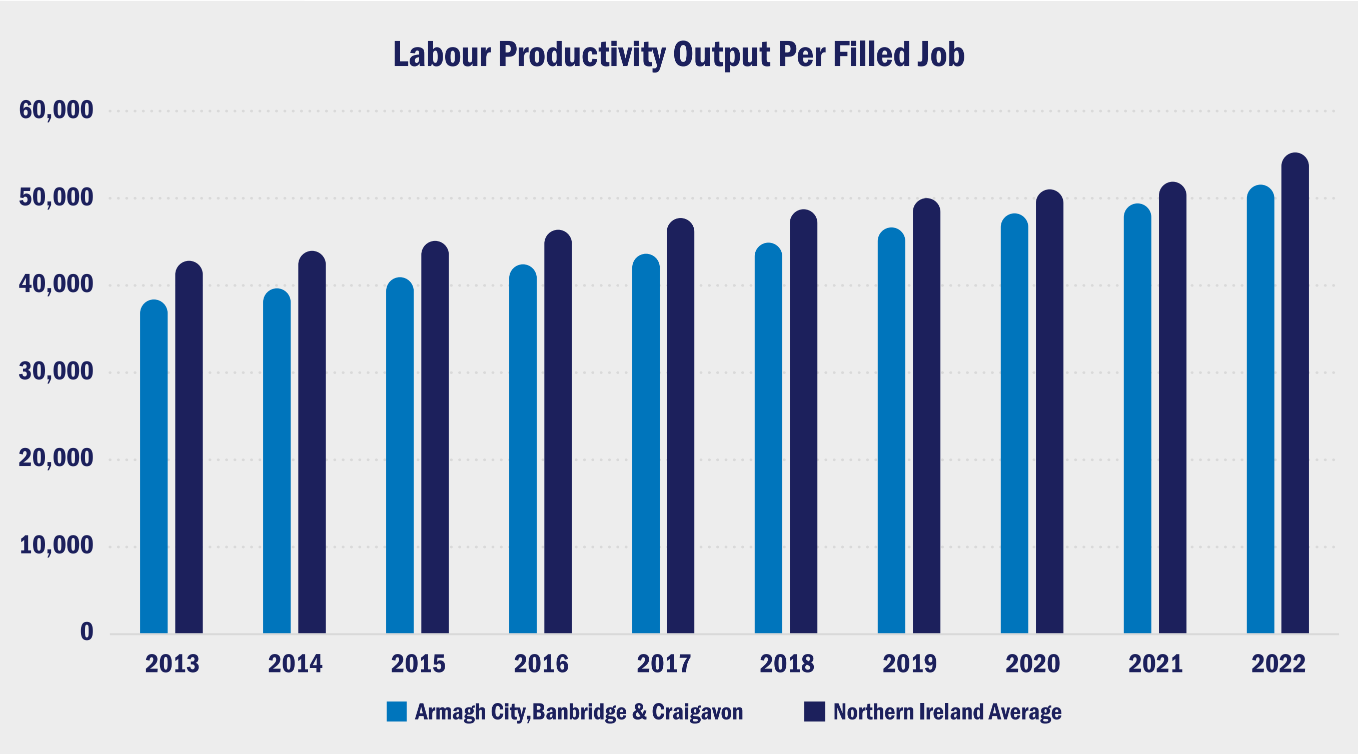
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	5	76.6%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	4	20.9%	24.7%
Gross Domestic Household Income (per head, 2021)	8	£17,216	£17,636
Tertiary Education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

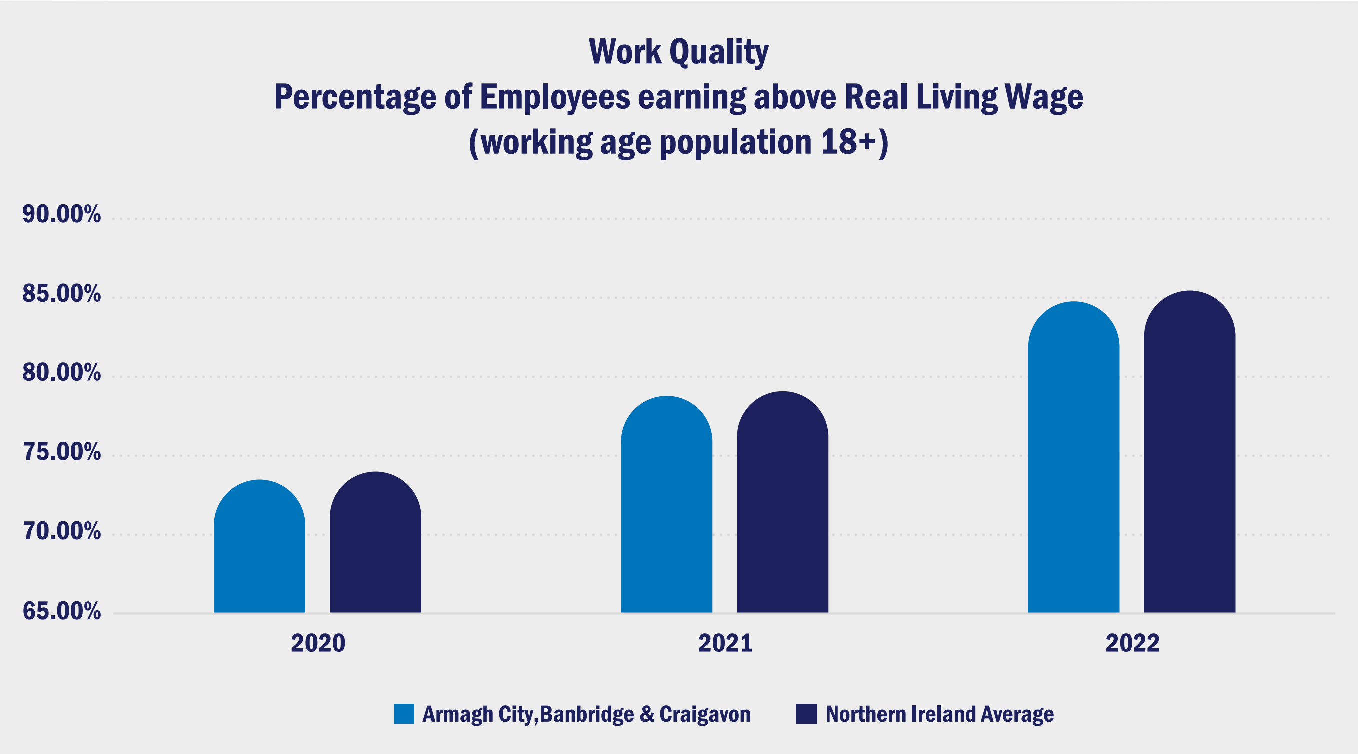
Raise Productivity



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.

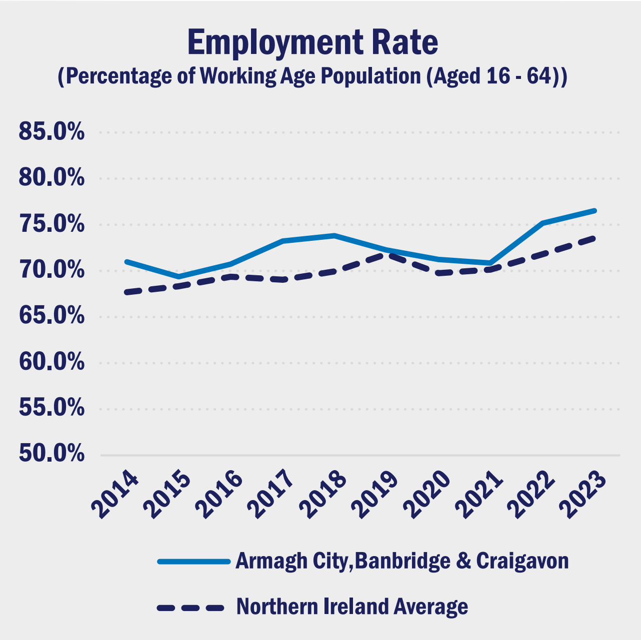
Good Jobs

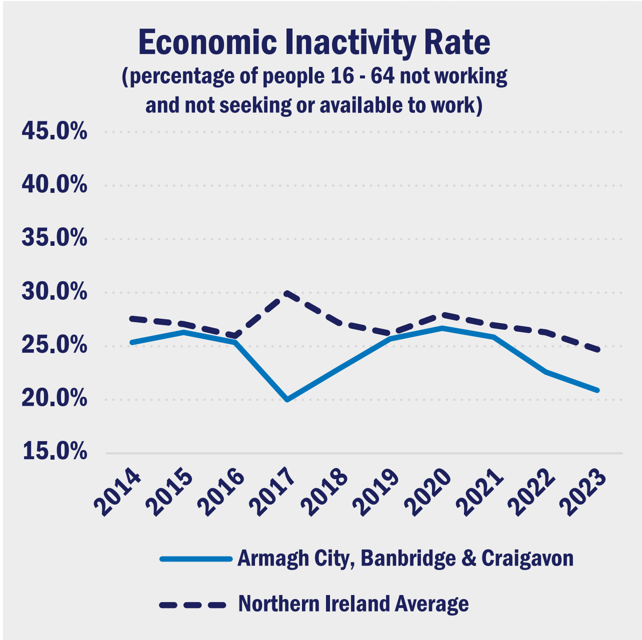


Source: Labour Force Survey, NISRA

- **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

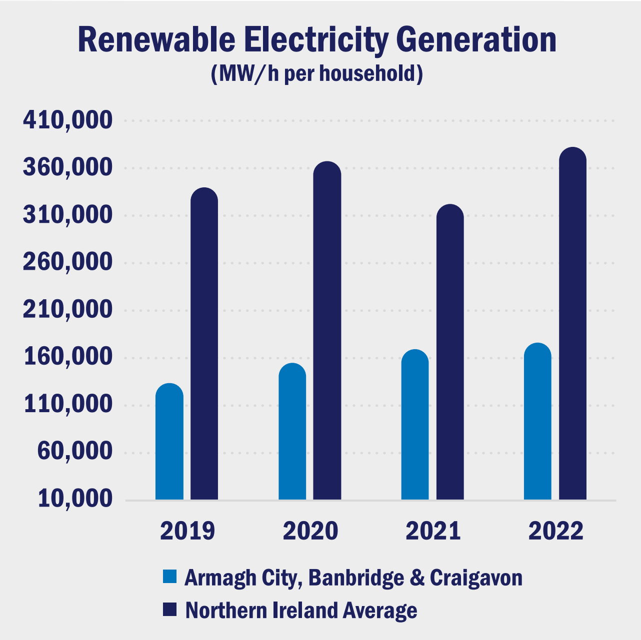


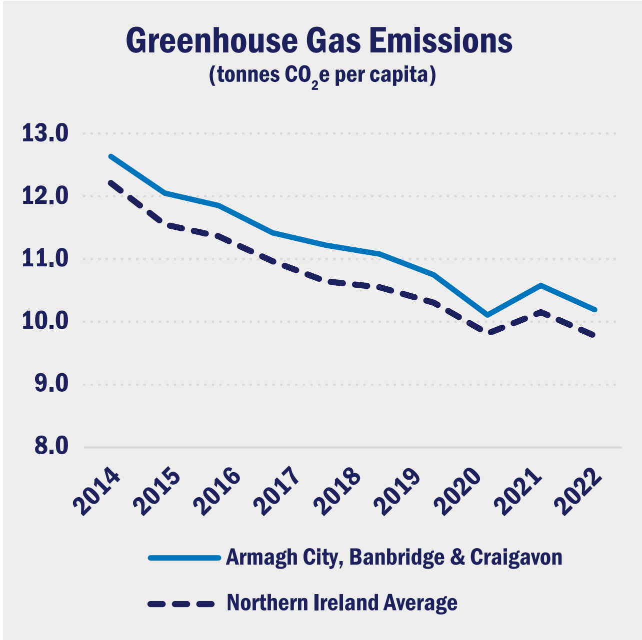


Source: Labour Force Survey, NISRA

- **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

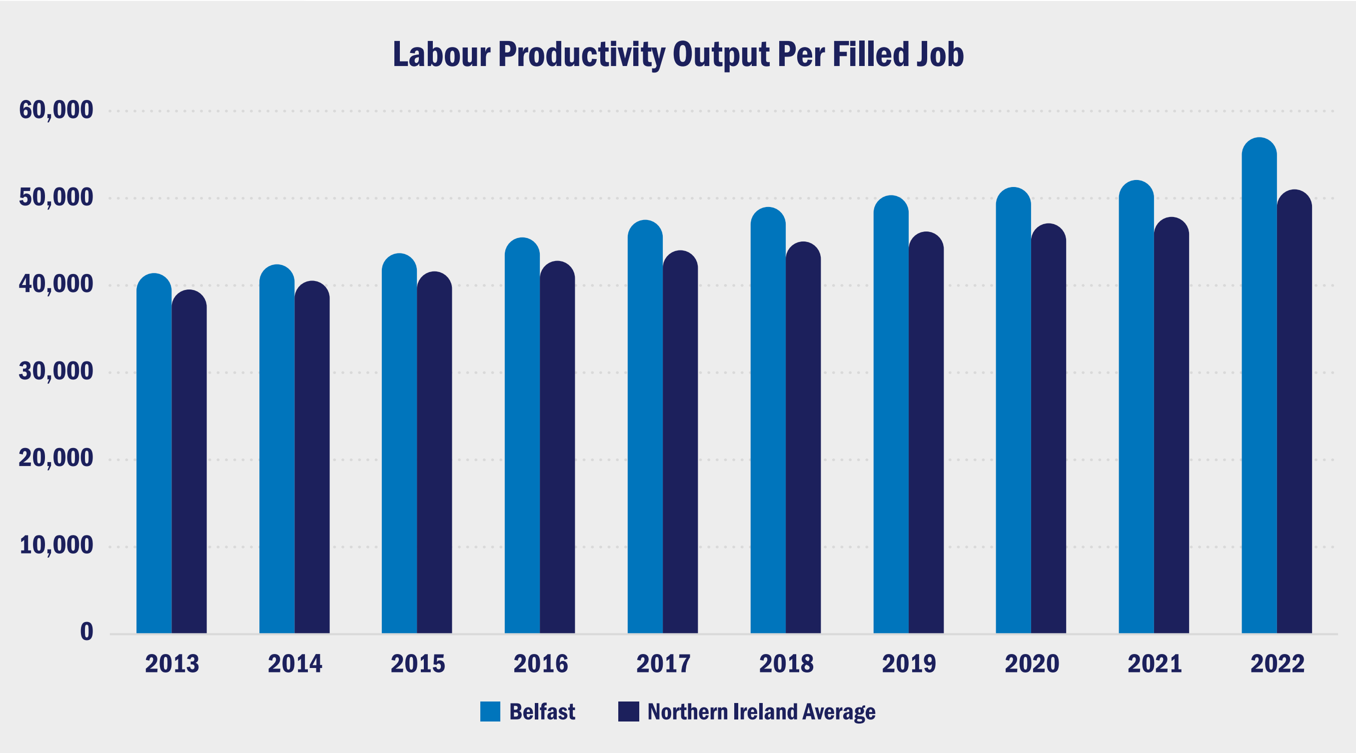
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	10	67.9%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	9	30.5%	24.7%
Gross Domestic Household Income (per head, 2021)	5	£17,507	£17,636
Tertiary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

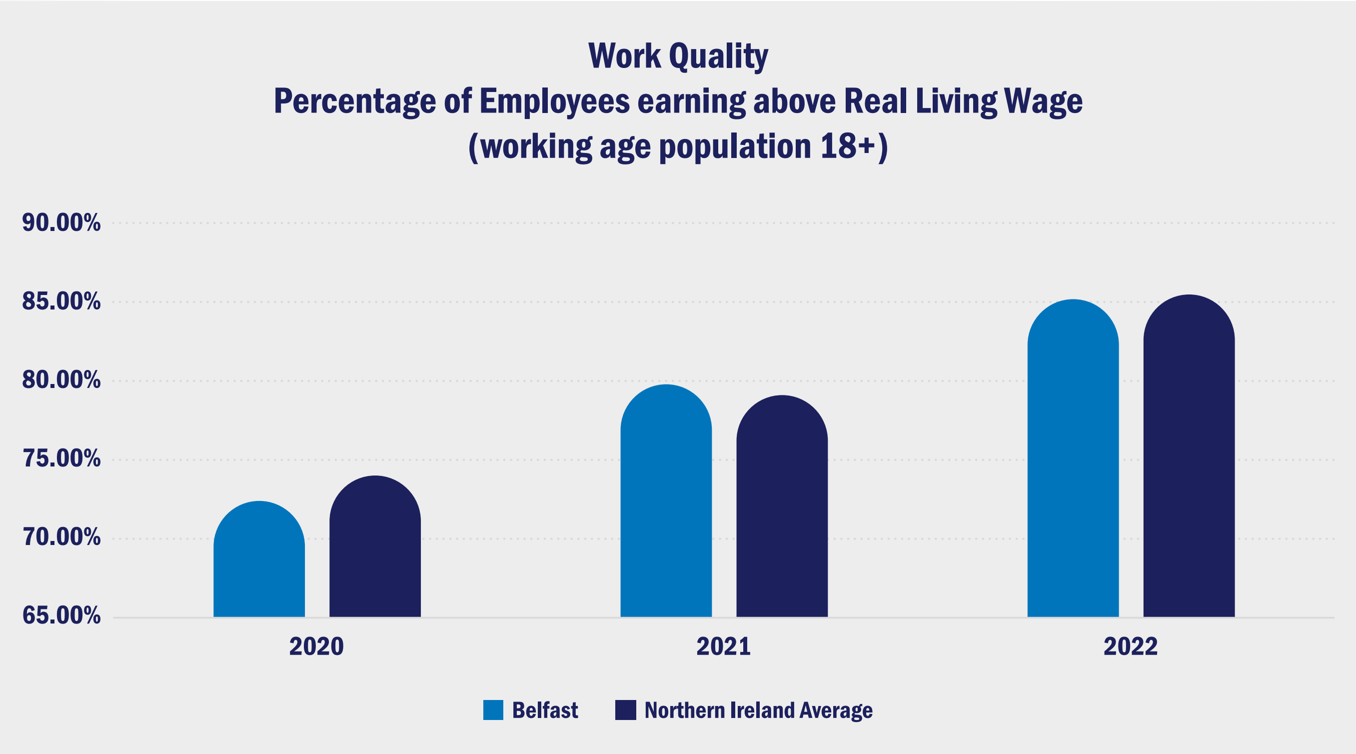
Raise Productivity



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.

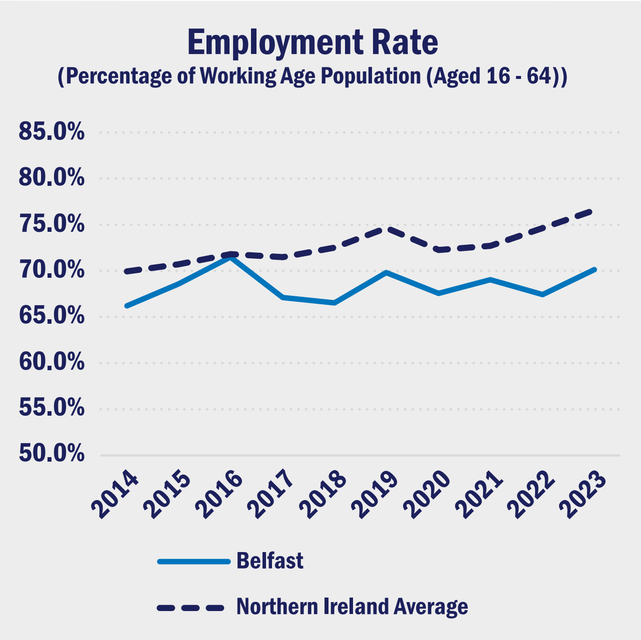
Good Jobs

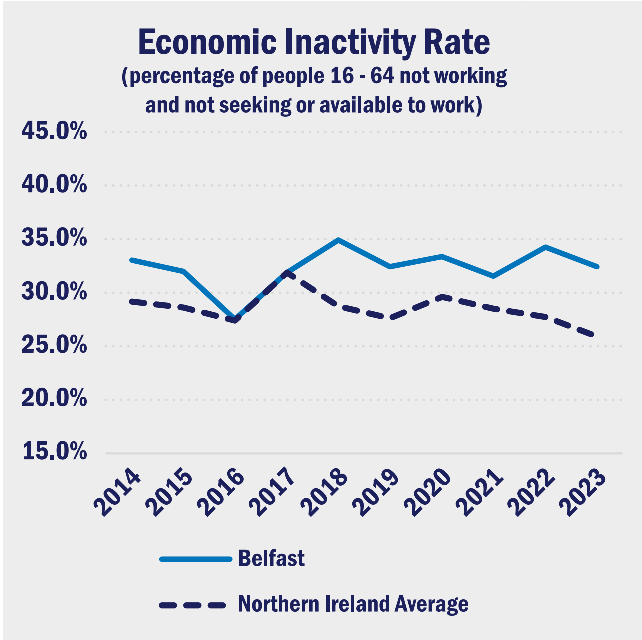


Source: Labour Force Survey, NISRA

- **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

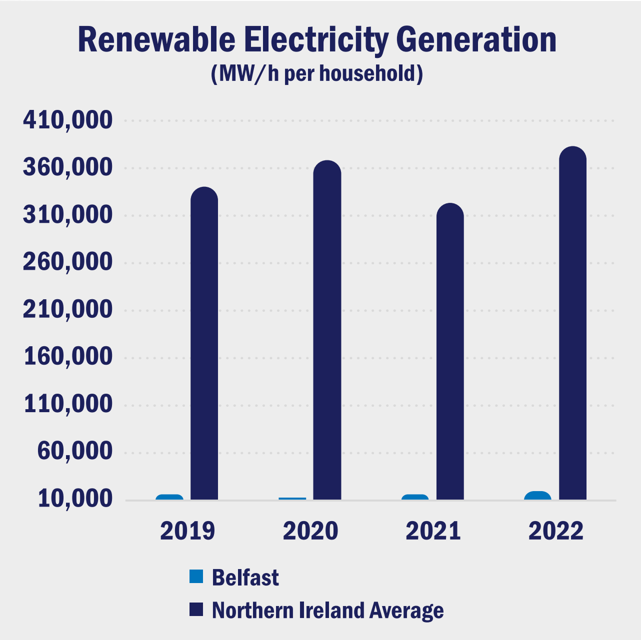


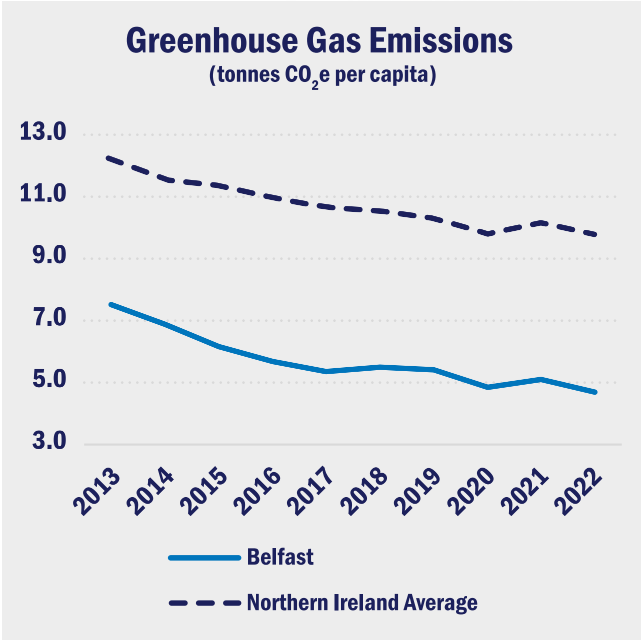


Source: Labour Force Survey, NISRA

- **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

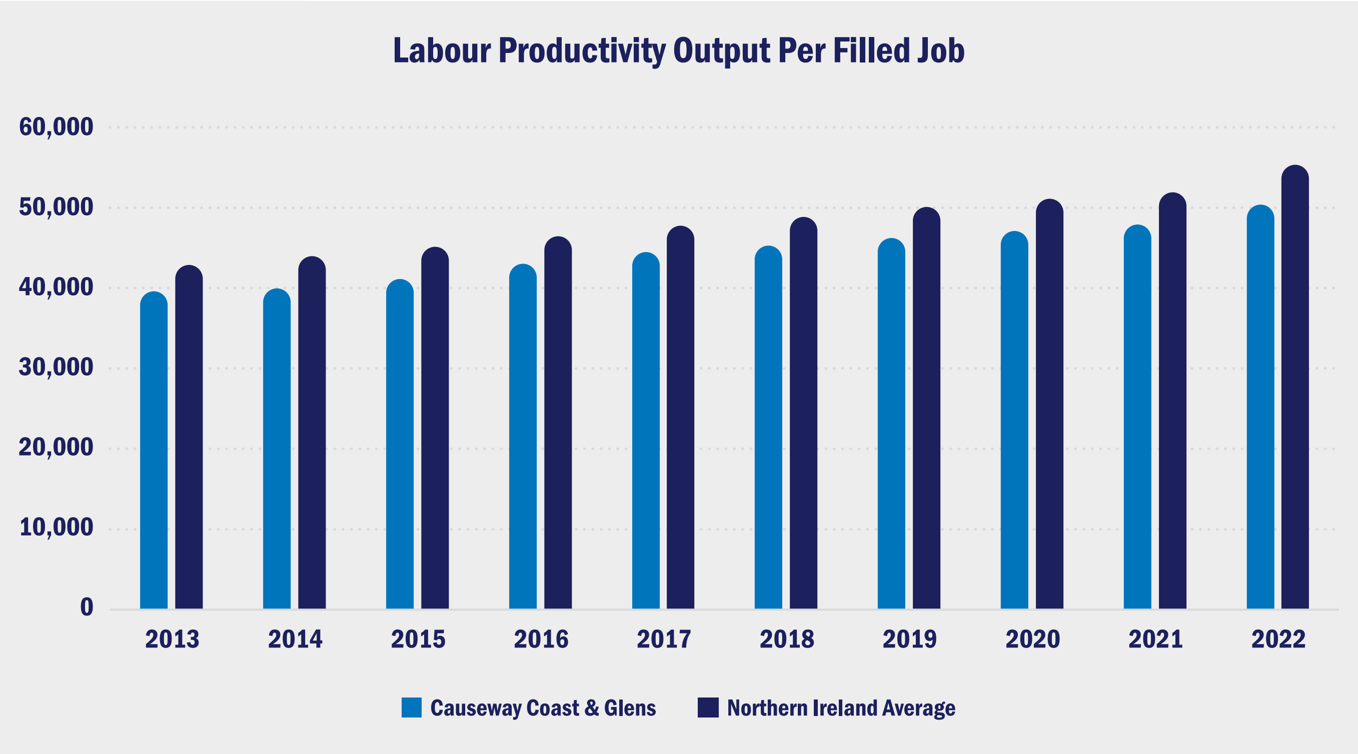
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	9	68.3%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	10	30.6%	24.7%
Gross Domestic Household Income (per head, 2021)	10	£16,918	£17,636
Tertiary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

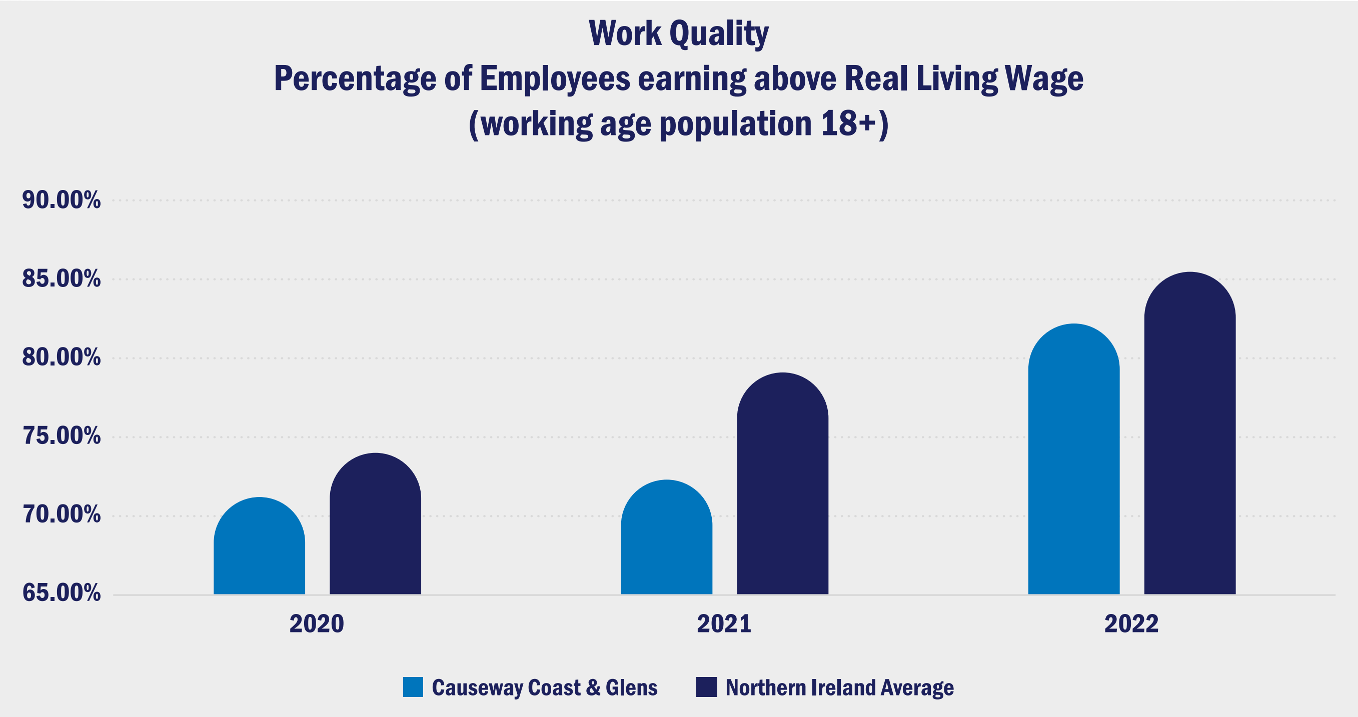
Raise Productivity



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

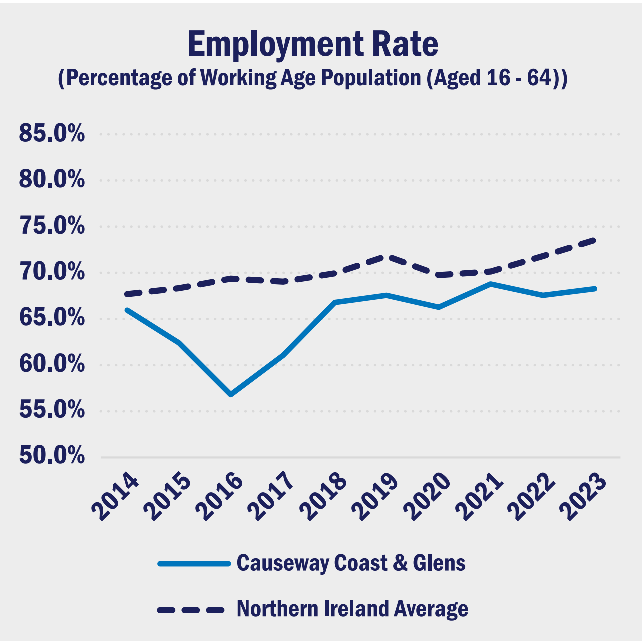
Good Jobs

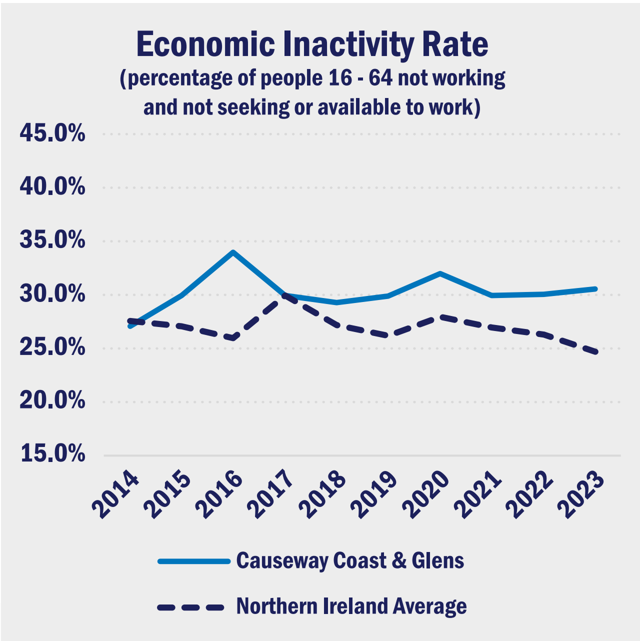


Source: Labour Force Survey, NISRA

- **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

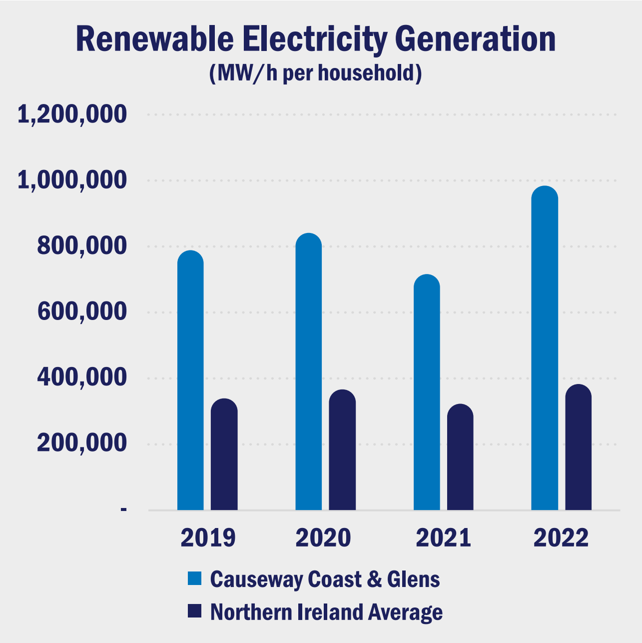


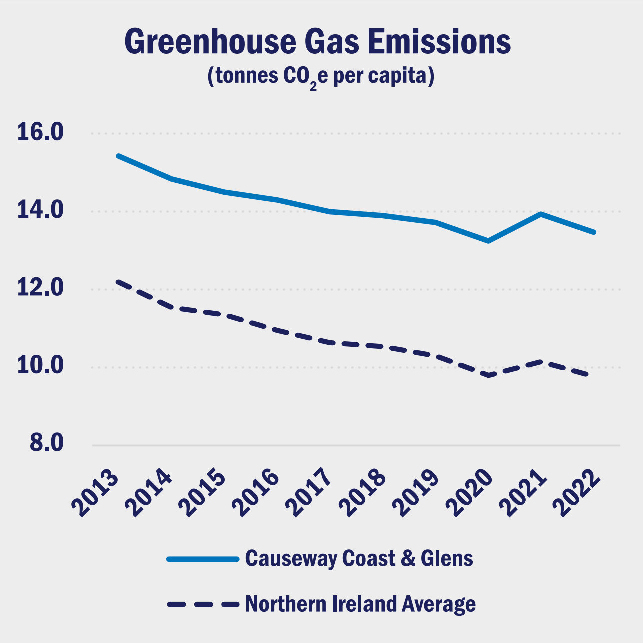


Source: Labour Force Survey, NISRA

- **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

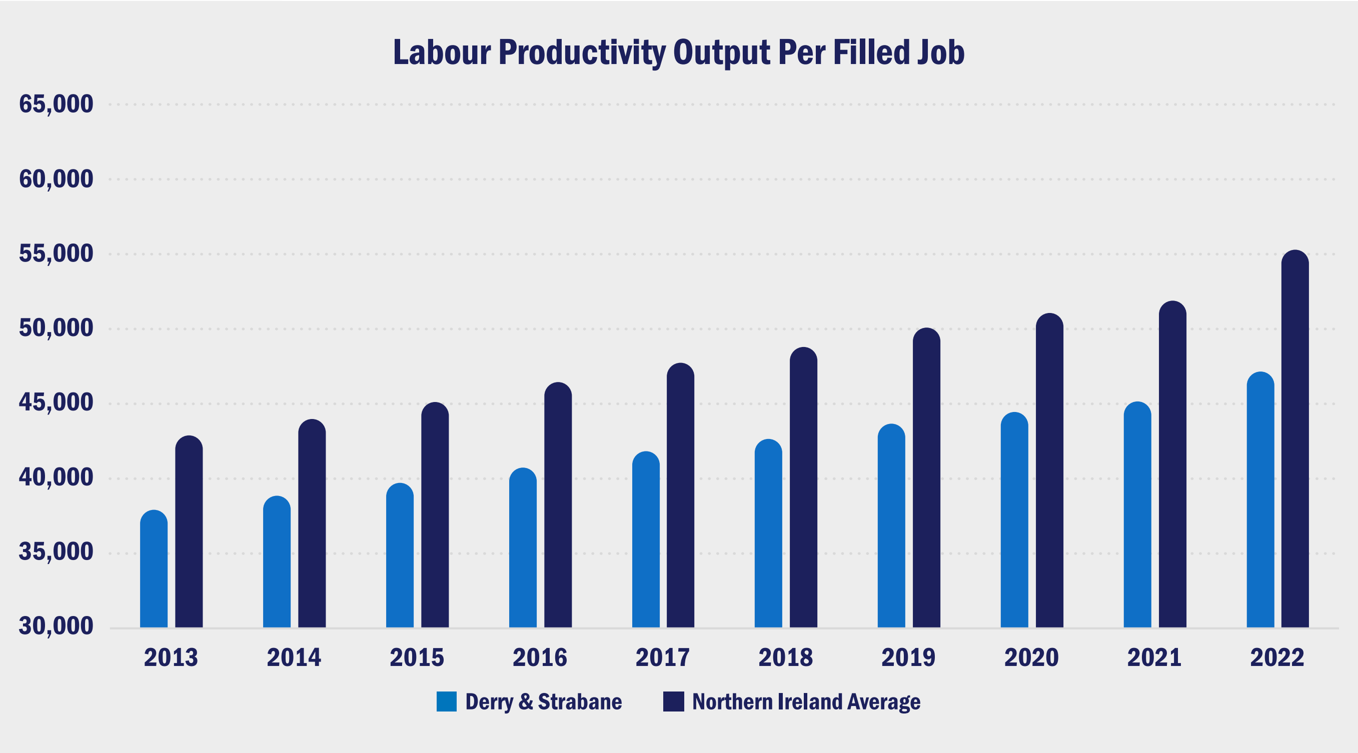
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	11	65.4%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	11	32.7%	24.7%
Gross Domestic Household Income (per head, 2021)	11	£16,572	£17,636
Tertiary 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

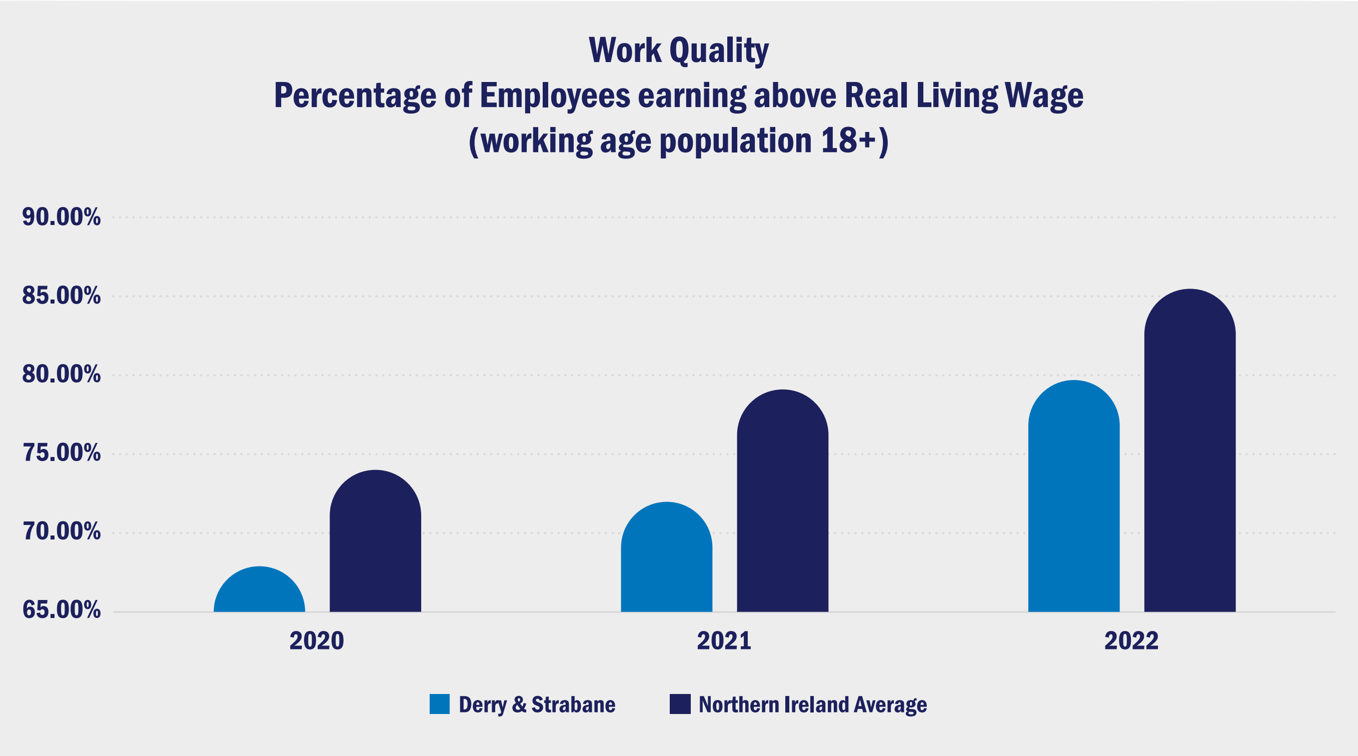
Raise Productivity



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.

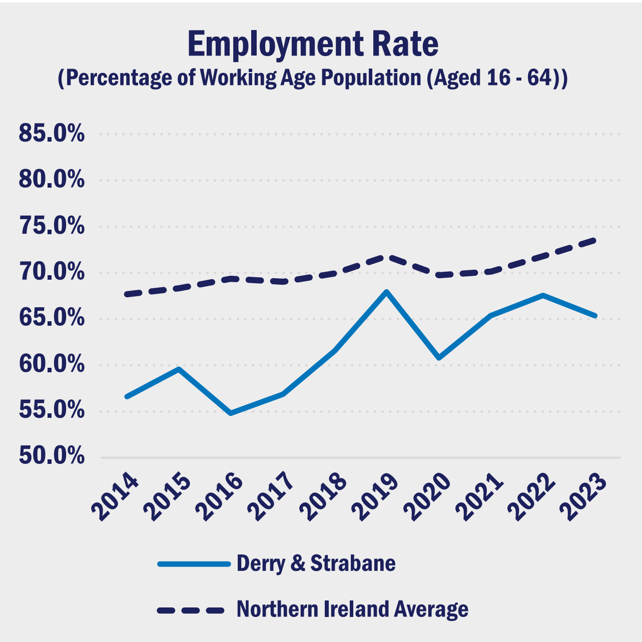
Good Jobs

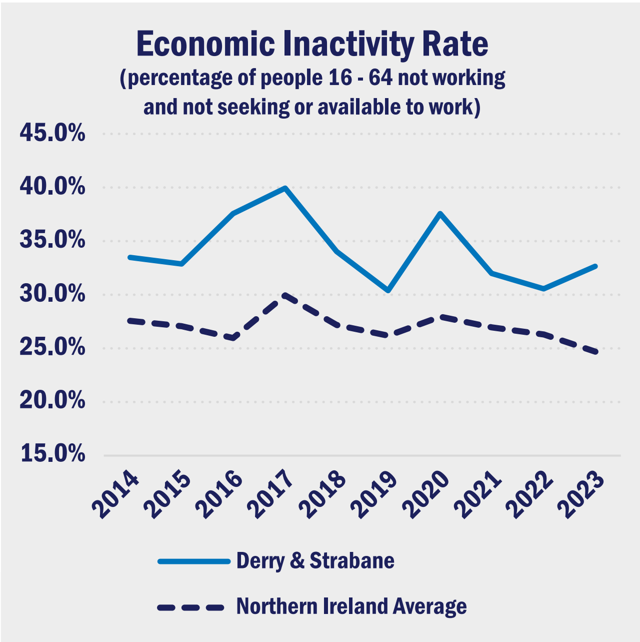


Source: Labour Force Survey. NISRA

- **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

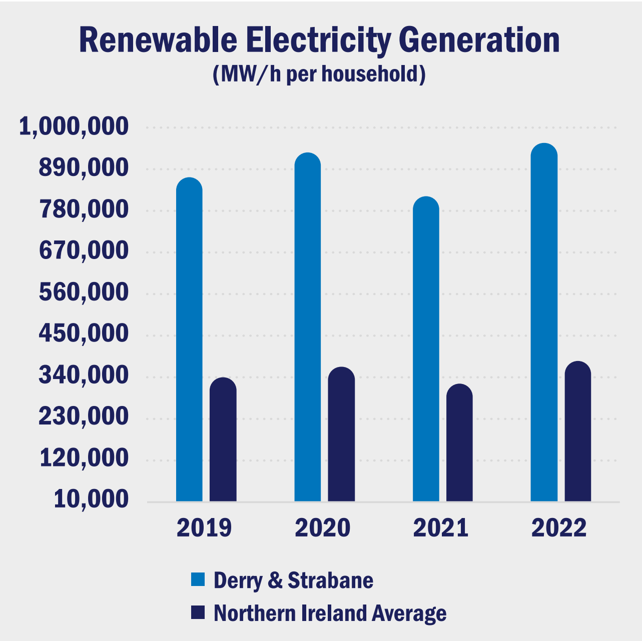


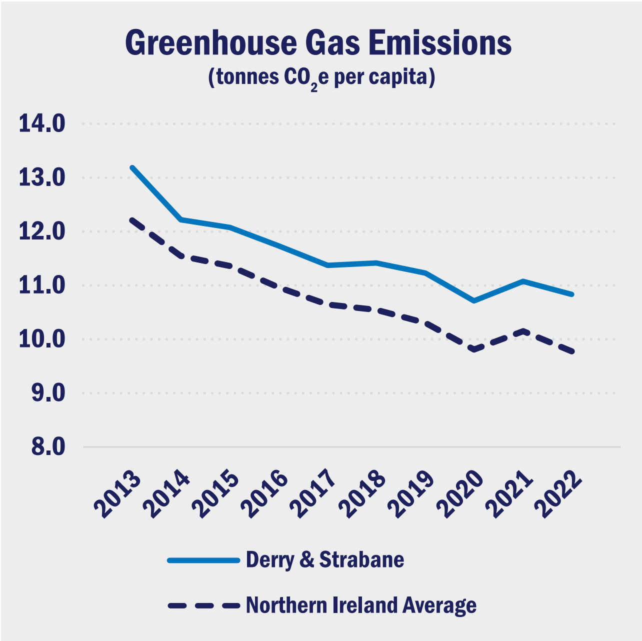


Source: Labour Force Survey, NISRA

- **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

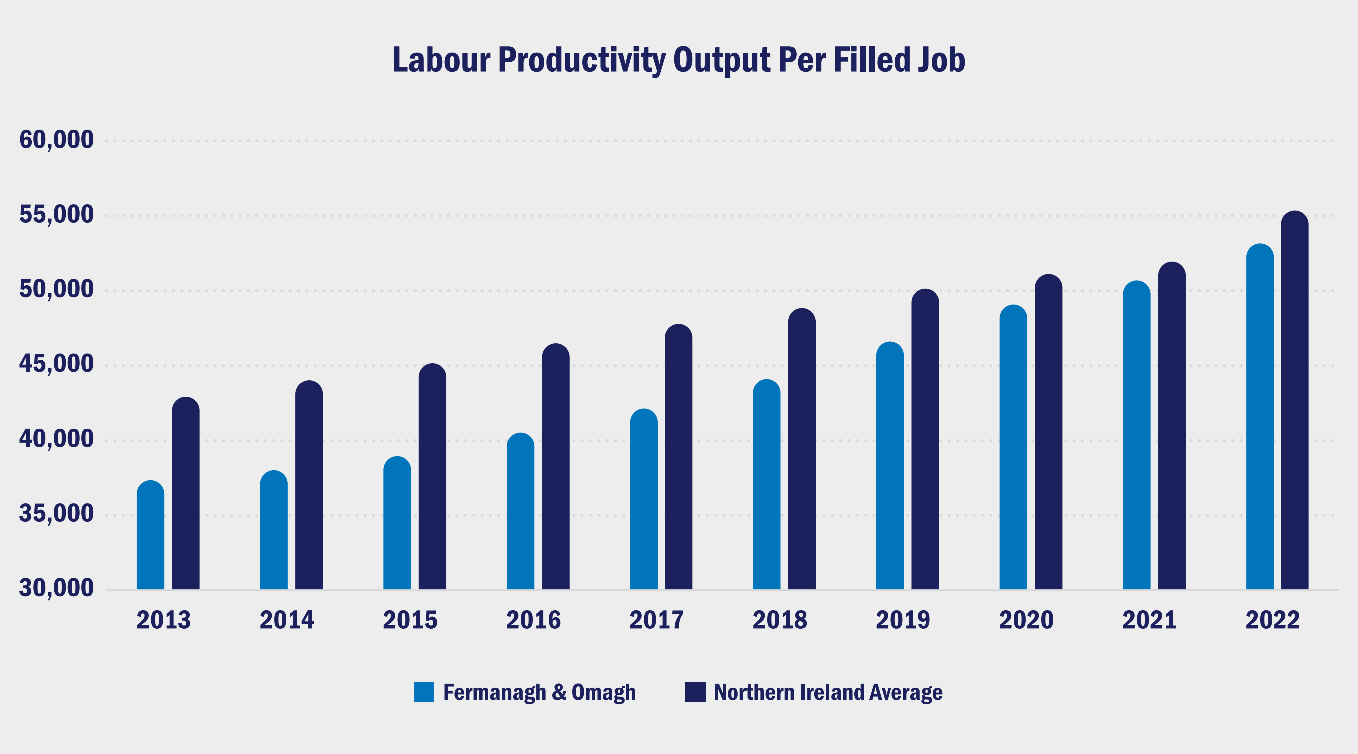
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	8	70.6%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	8	26%	24.7%
Gross Domestic Household Income (per head, 2021)	9	£17,132	£17,636
Tertiary Education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

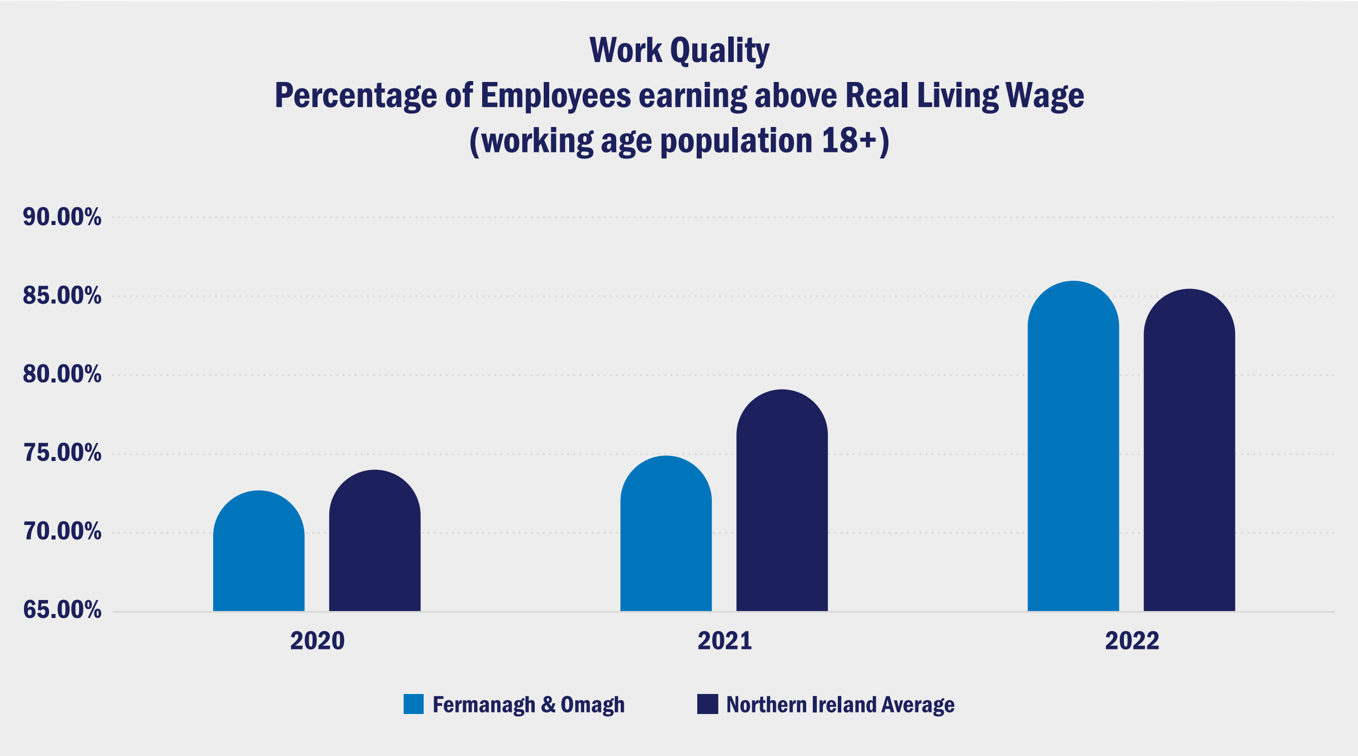
Raise Productivity



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.

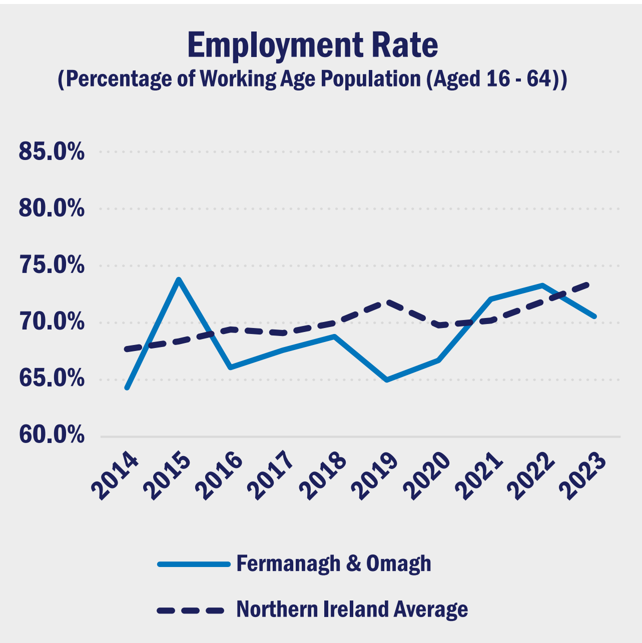
Good Jobs

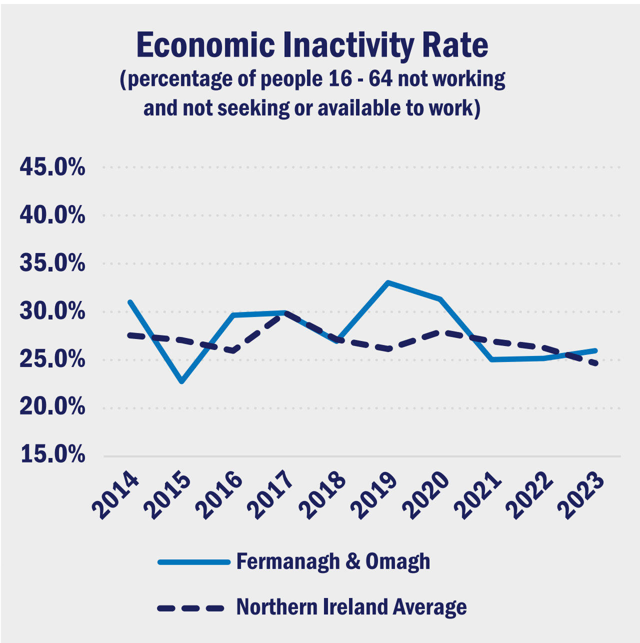


Source: Labour Force Survey, NISRA

- **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

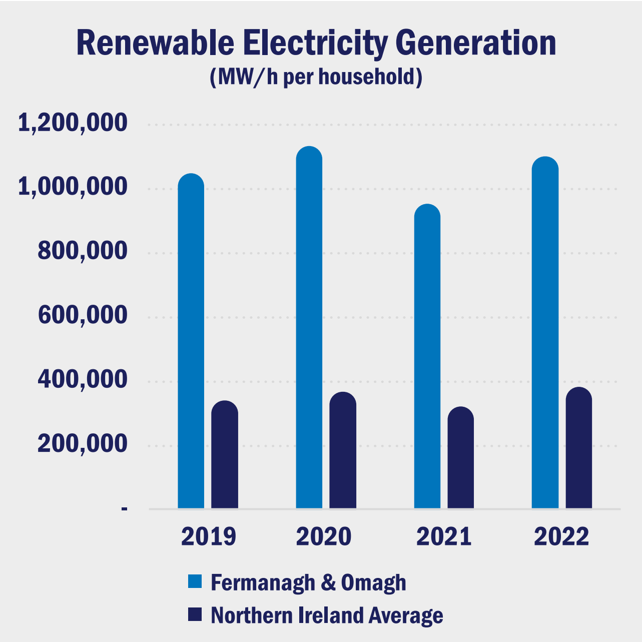


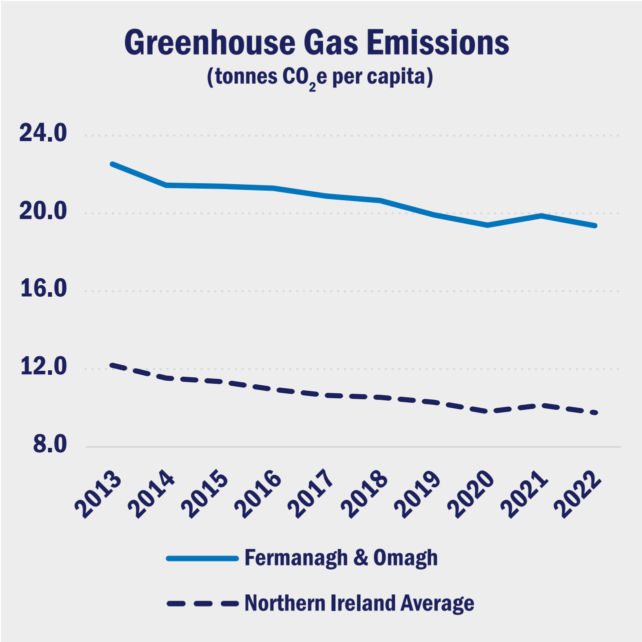


Source: Labour Force Survey, NISRA

- **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:

<u>Driving Sustainable Growth and Innovation</u>

- 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

<u>Building a place for sustainable business</u>

- 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

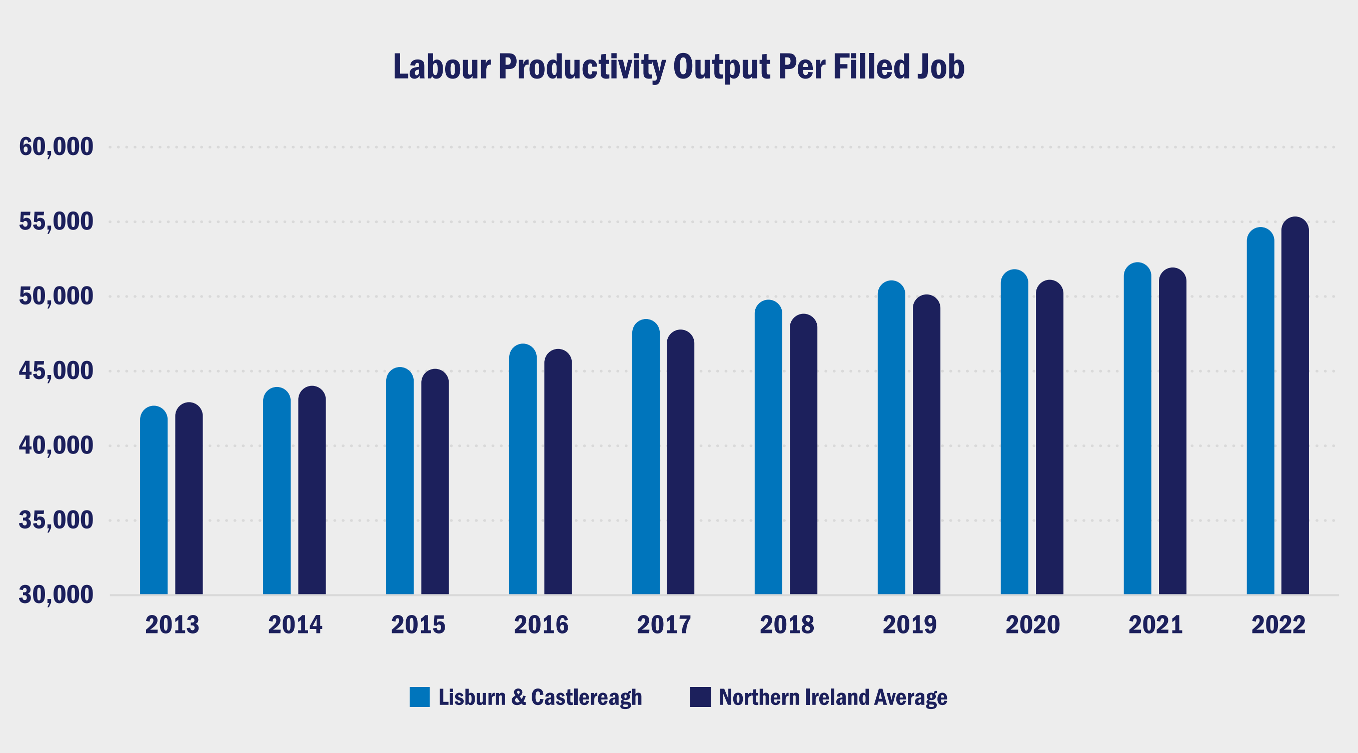
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	4	77.8%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	5	21.7%	24.7%
Gross Domestic Household Income (per head, 2021)	1	£19,223	£17,636
Tertiary Education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

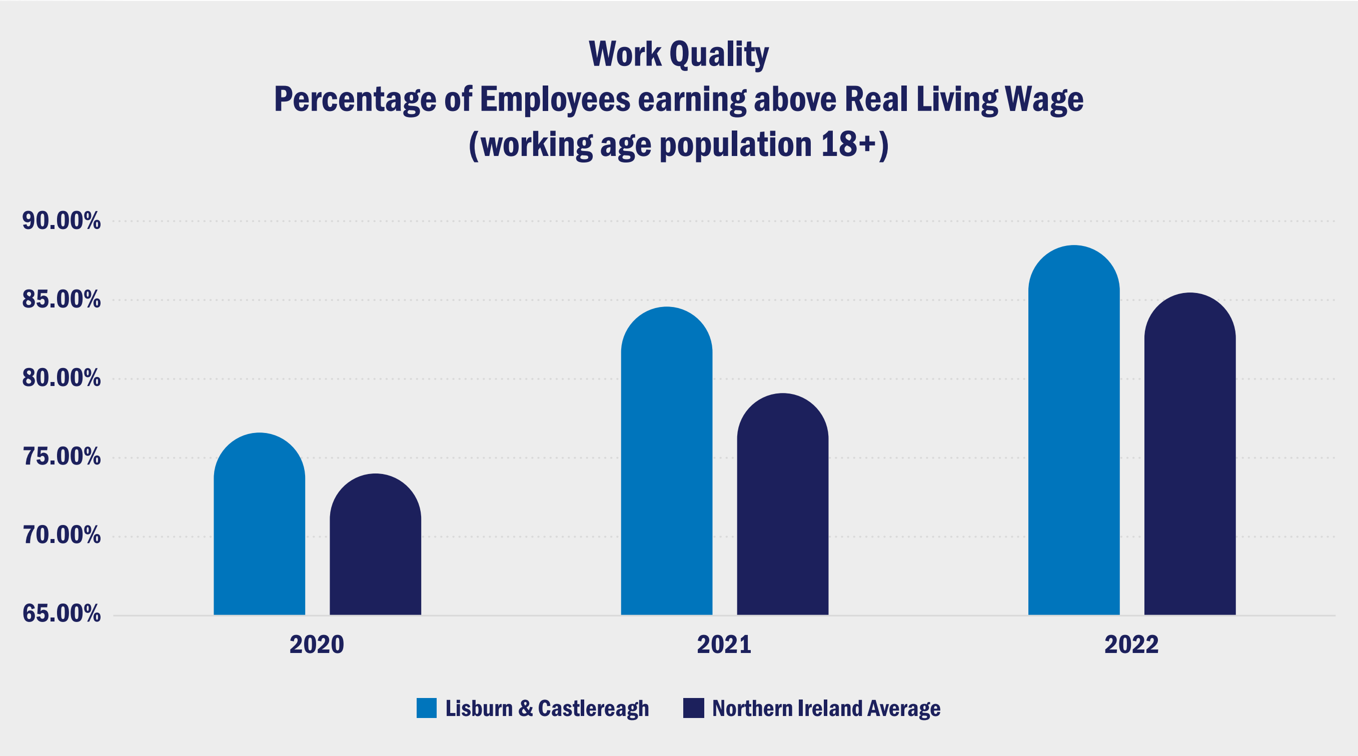
Raise Productivity



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.

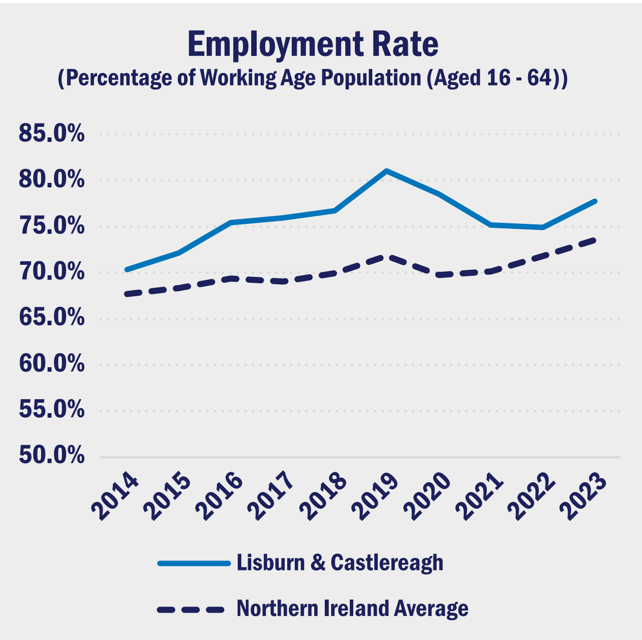
Good Jobs

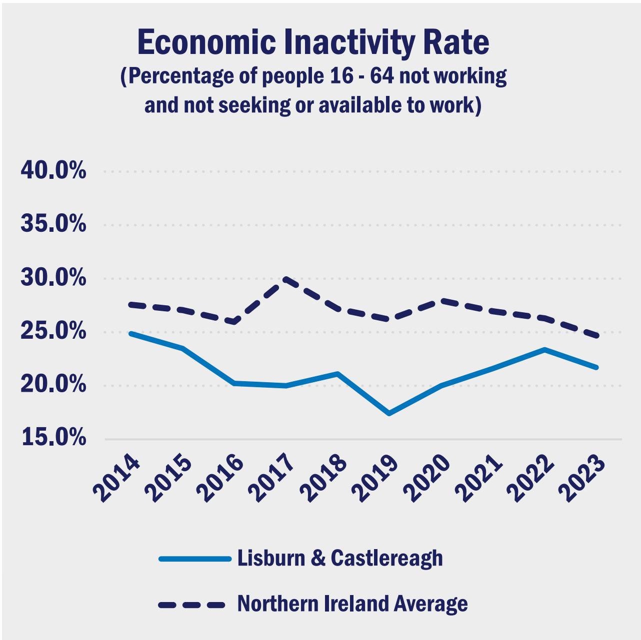


Source: Labour Force Survey NISRA

- **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

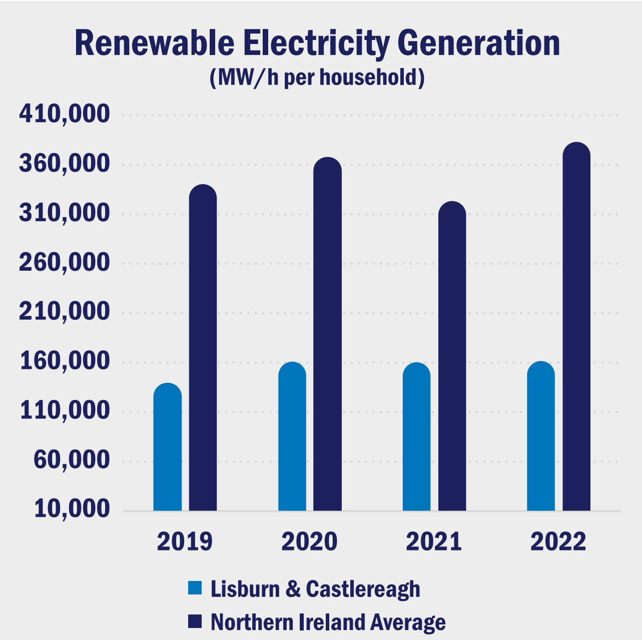


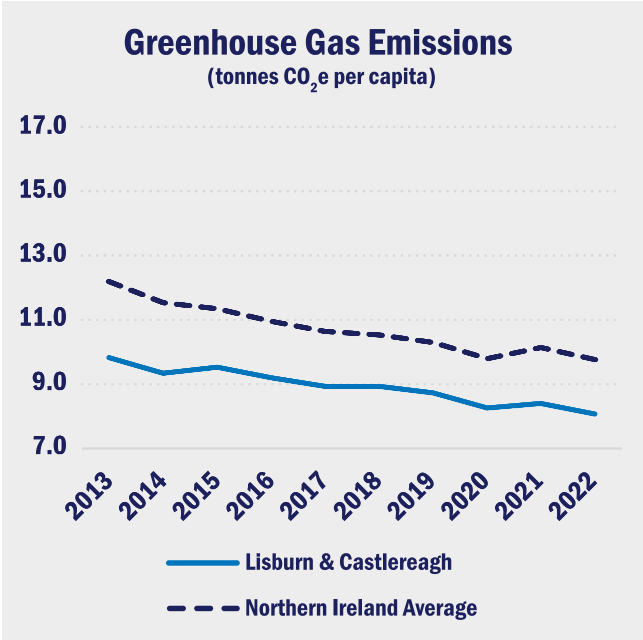


Source: Labour Force Survey, NISRA

- **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

<table>
<tr><td>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</td><td>Education
• Colleges: South Eastern Regional College
• Construction Curriculum Hub – Lisburn campus</td></tr>
<tr><td>Tourism
• Royal Hillsborough & Historic Moira
• Irish Linen Museum
• Lagan Valley Regional Park
• Hilden Brewery and Hinch Distillery
• Numerous golf courses across the area</td><td>Retail
• Large retail clusters at Forestside, Lisburn City and Sprucefield</td></tr>
<tr><td colspan="2">Maze Long Kesh
• 347 acres strategically located site (adjacent to M1) with potential for regeneration and economic development.</td></tr>
</table>

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

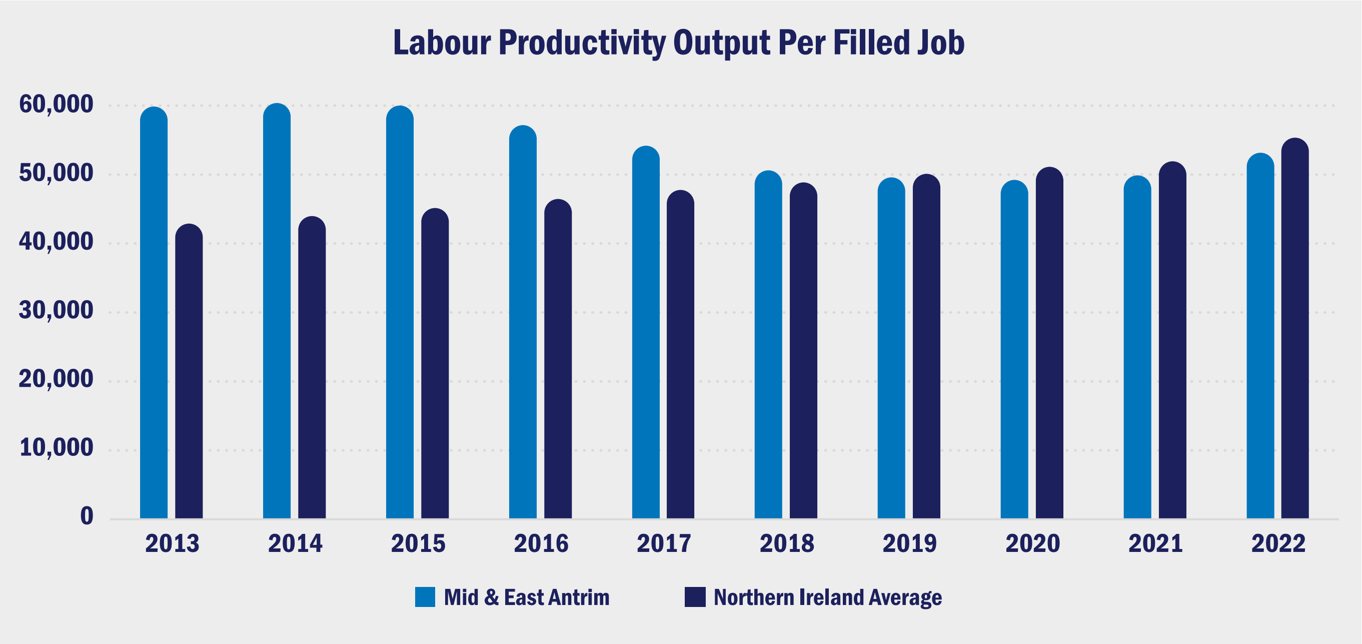
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	1	79.5%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	1	19.3%	24.7%
Gross Domestic Household Income (per head, 2021)	4	£17,767	£17,636
Tertiary Education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

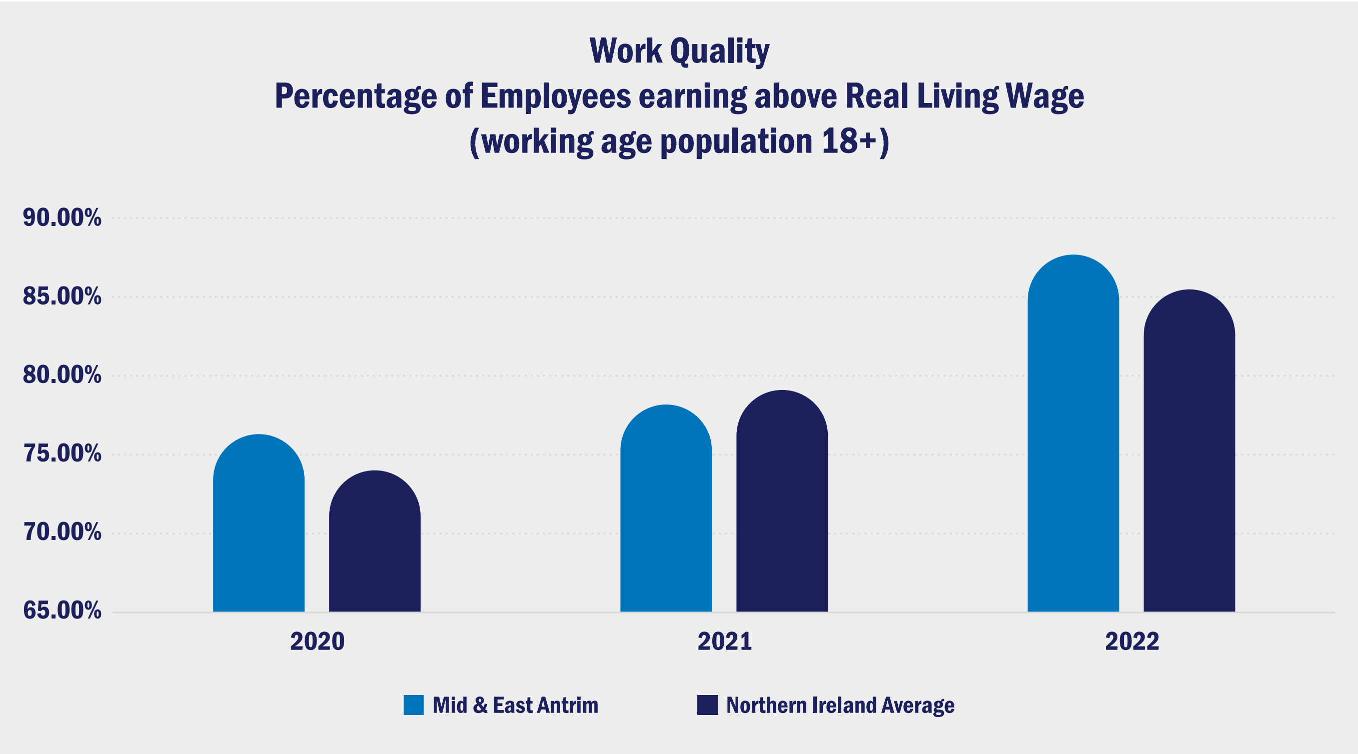
Raise Productivity



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.

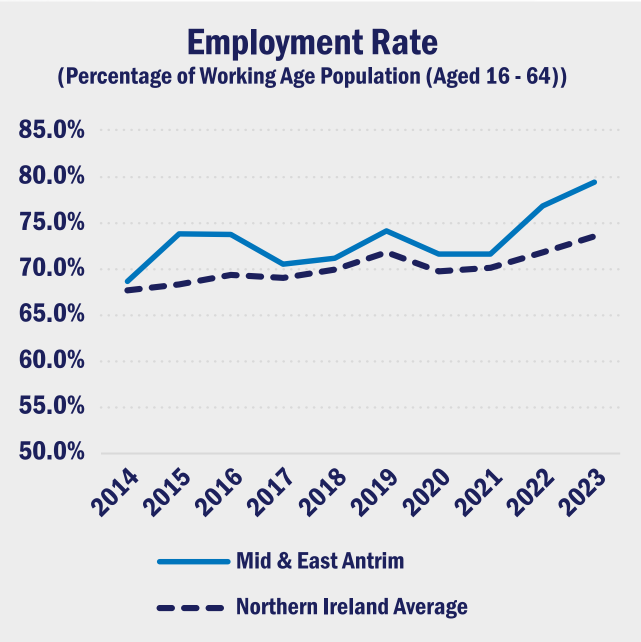
Good Jobs

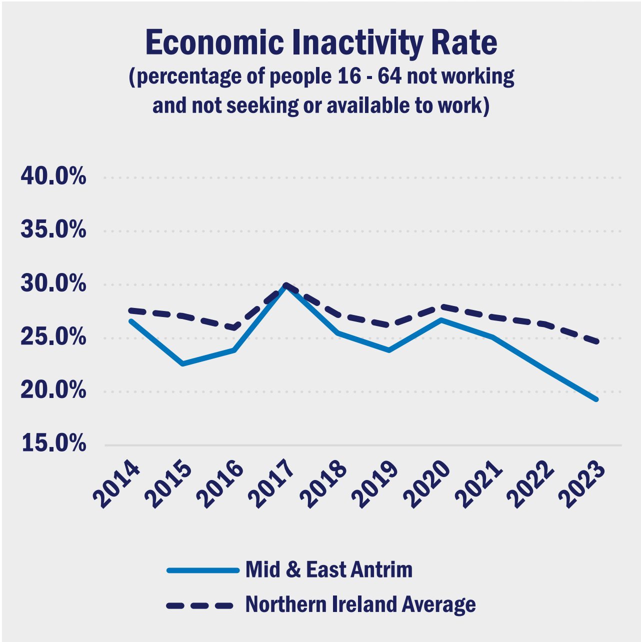


Source: Labour Force Survey, NISRA

- **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

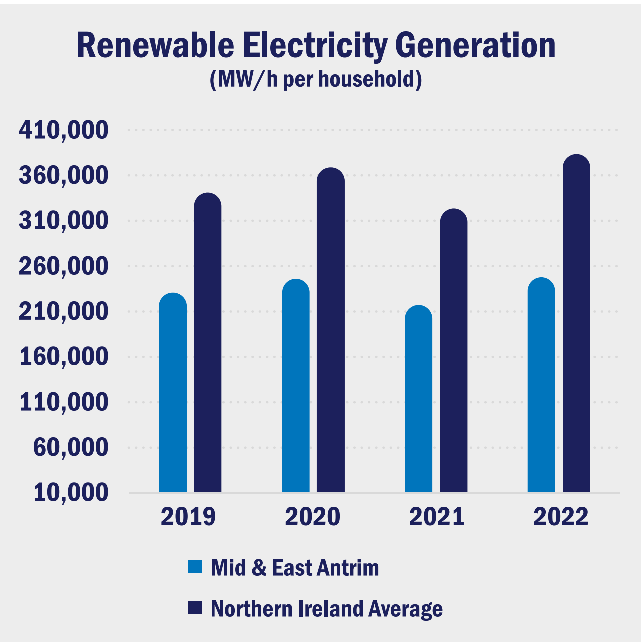


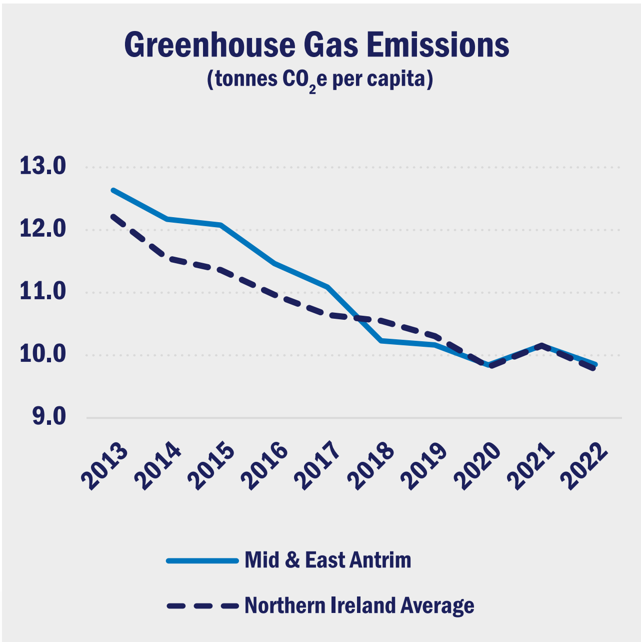


Source: Labour Force Survey, NISRA

- **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

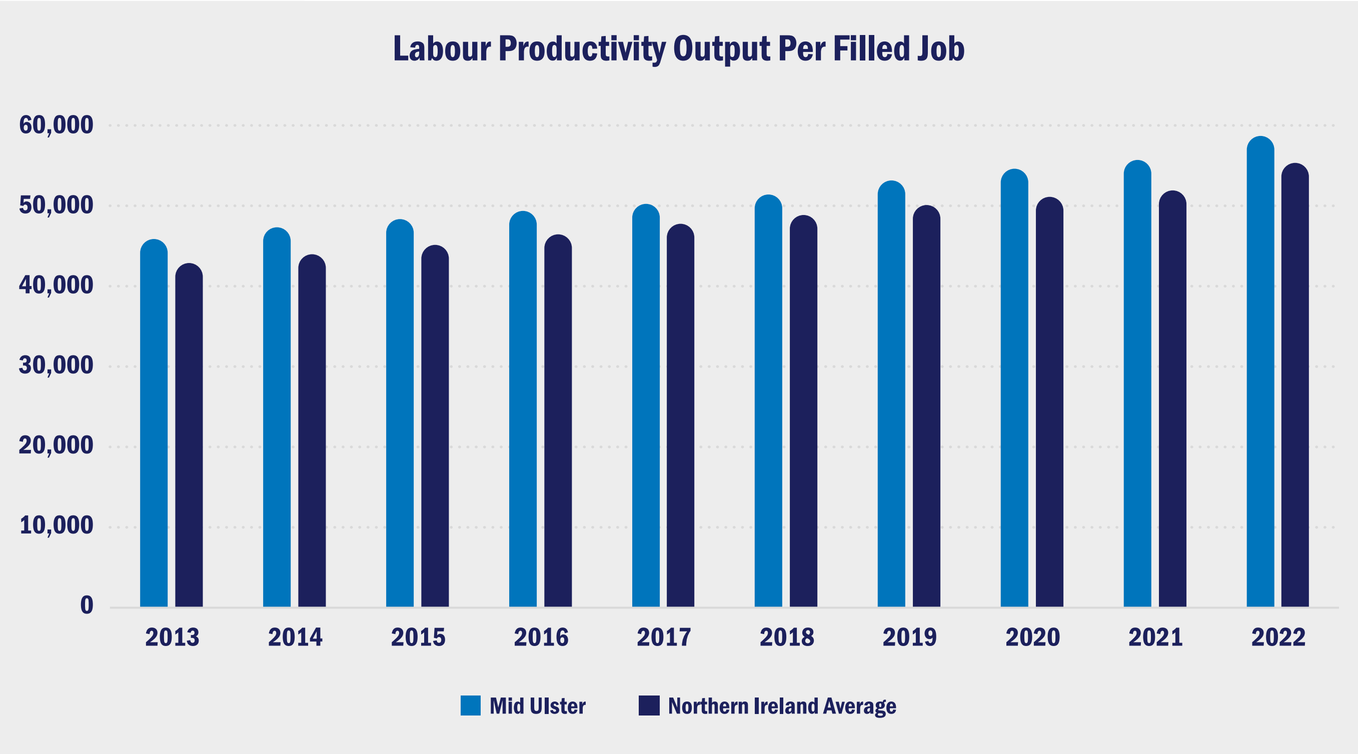
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	7	74.9%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	6	23.3%	24.7%
Gross Domestic Household Income (per head, 2021)	6	£17,495	£17,636
Tertiary Education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

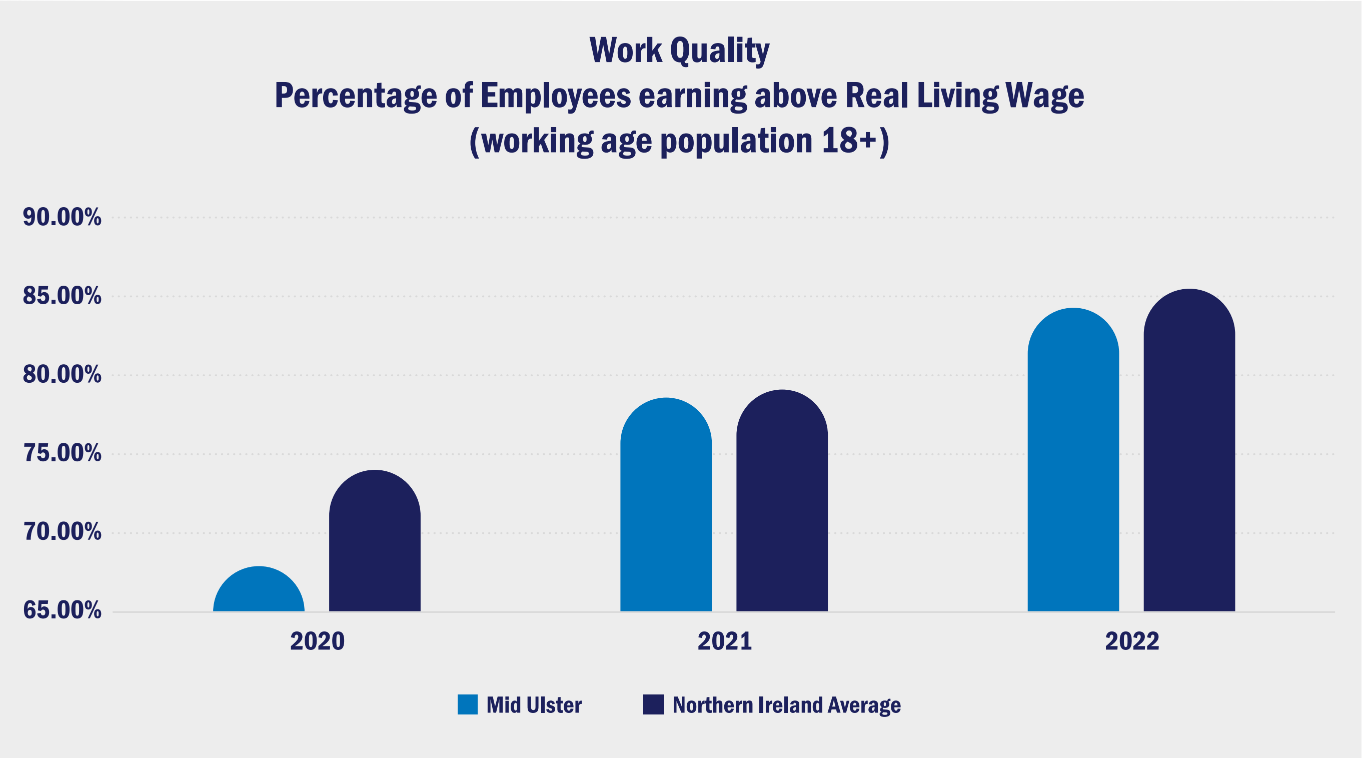
Raise Productivity



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.

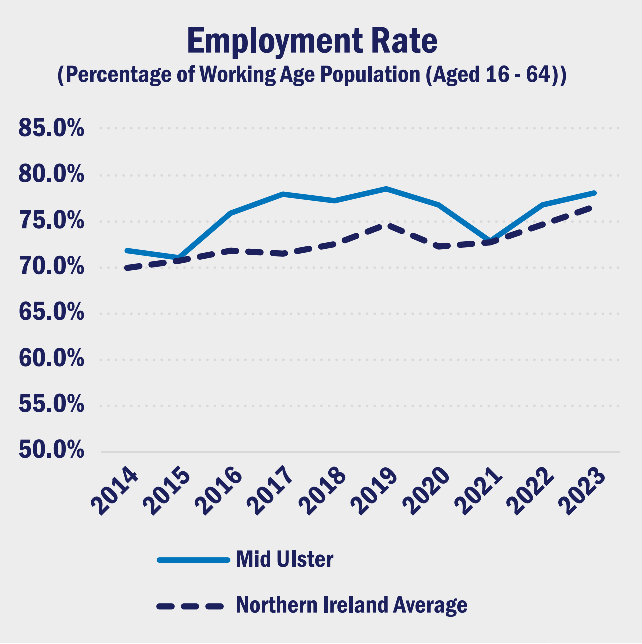
Good Jobs

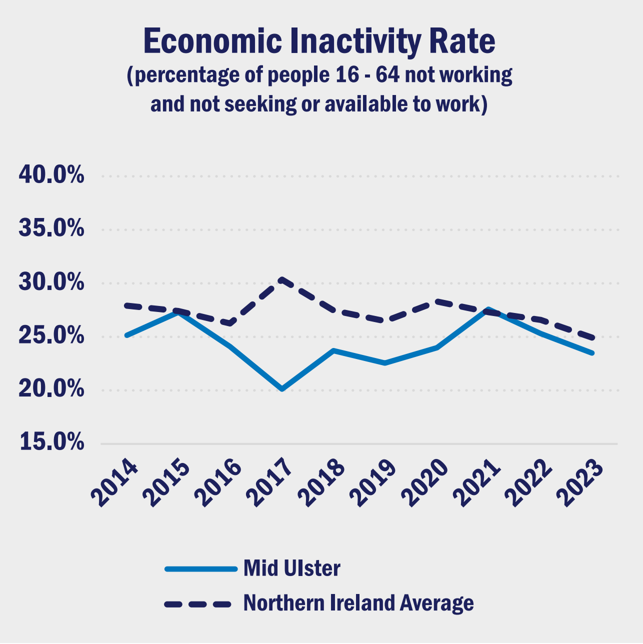


Source: Labour Force Survey, NISRA

- **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

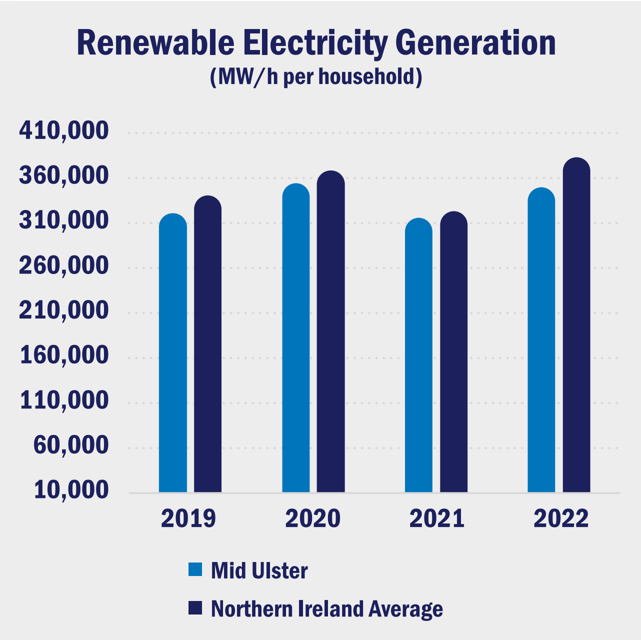


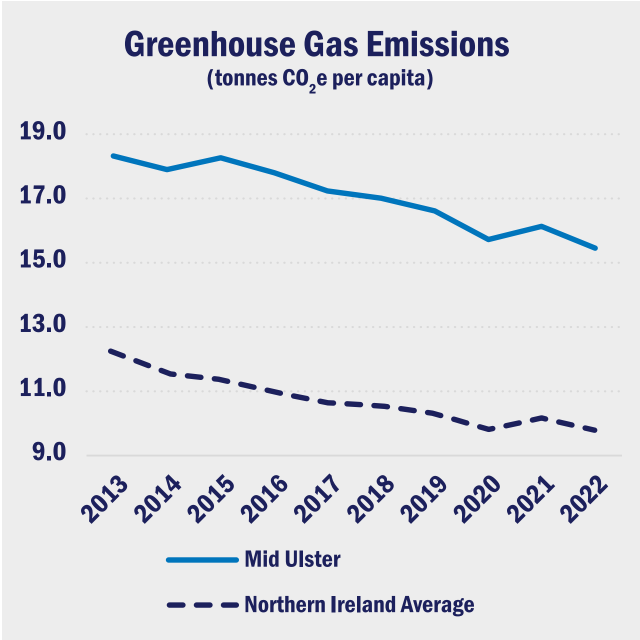


Source: Labour Force Survey, NISRA

- **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

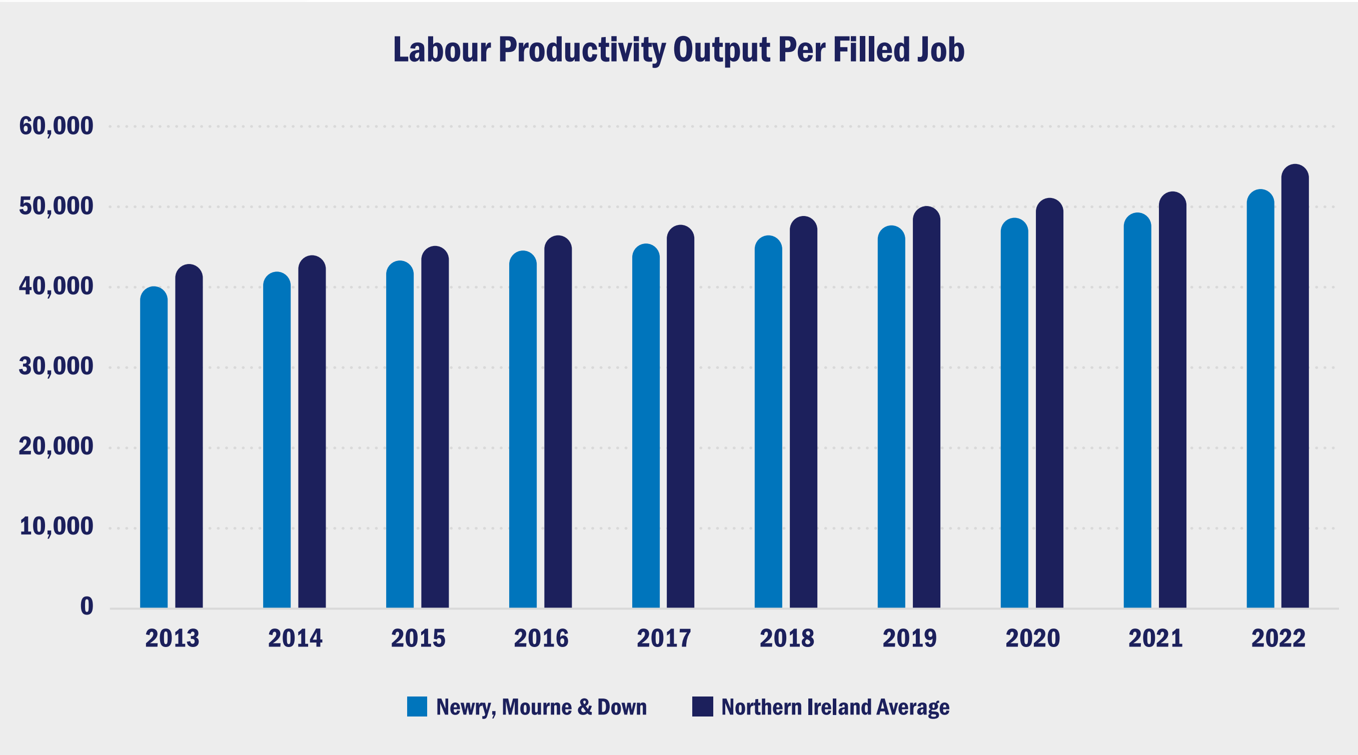
Indicator	LGD Rank	Value (Latest Period)	NI Average
Employment Rate (people 16 – 64 in work, 2023)	2	78.8%	73.6%
Economic Inactivity Rate (people 16 – 64 not working and not seeking or available to work, 2023)	2	19.5%	24.7%
Gross Domestic Household Income (per head, 2021)	7	£17,275	£17,636
Tertiary Education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

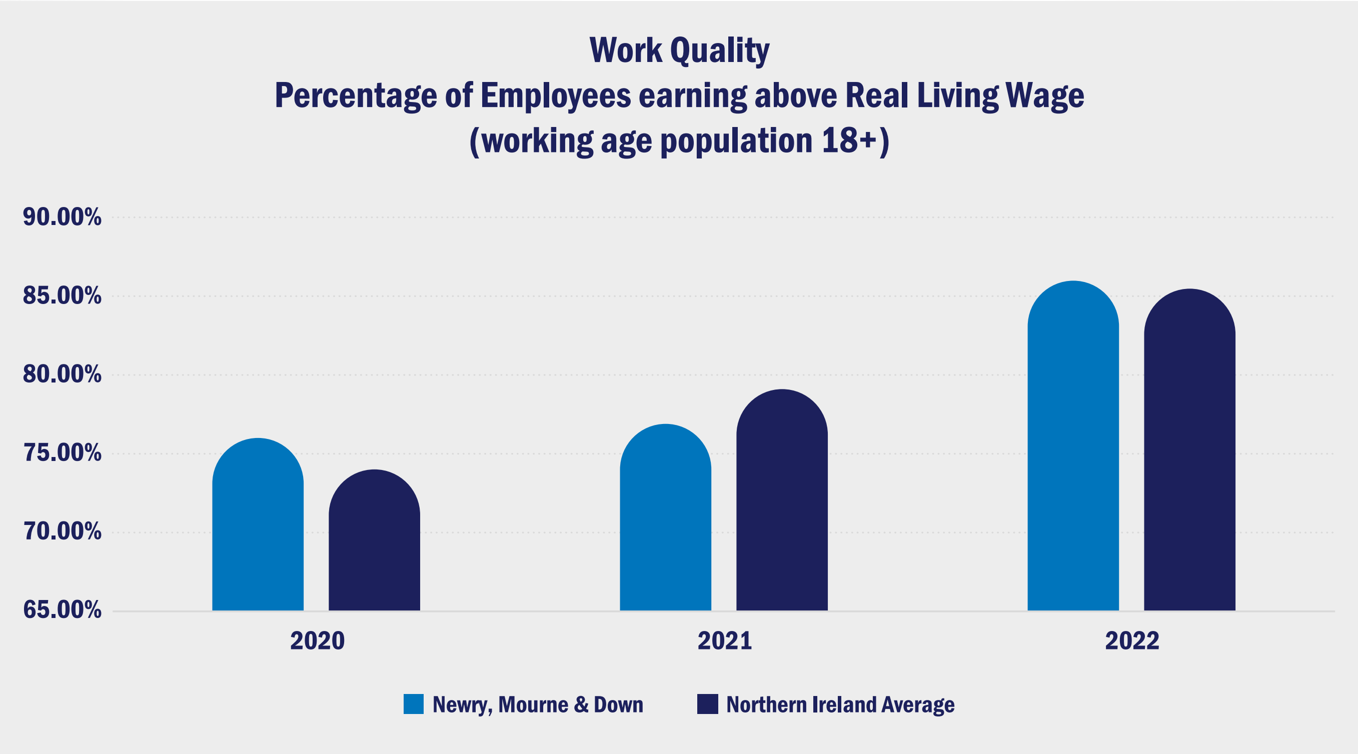
Raise Productivity



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).

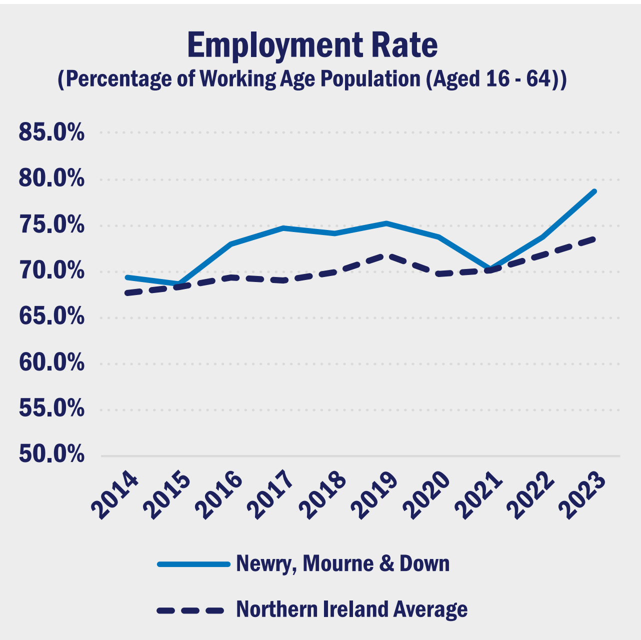
Good Jobs

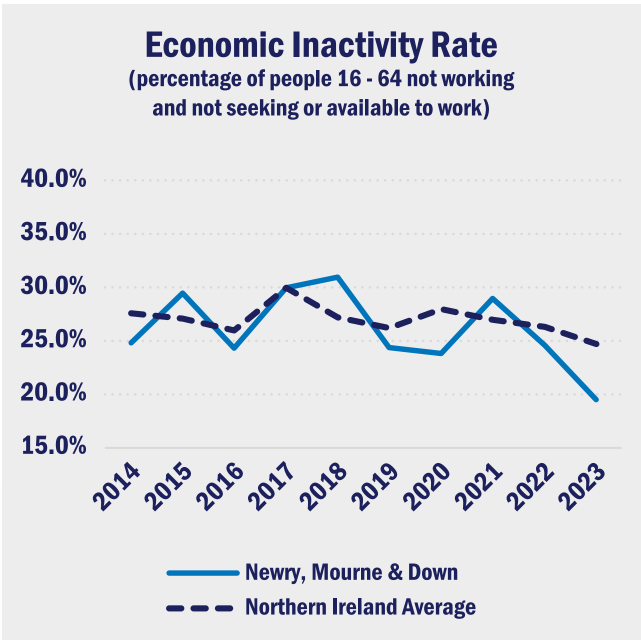


Source: Labour Force Survey, NISRA

- **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

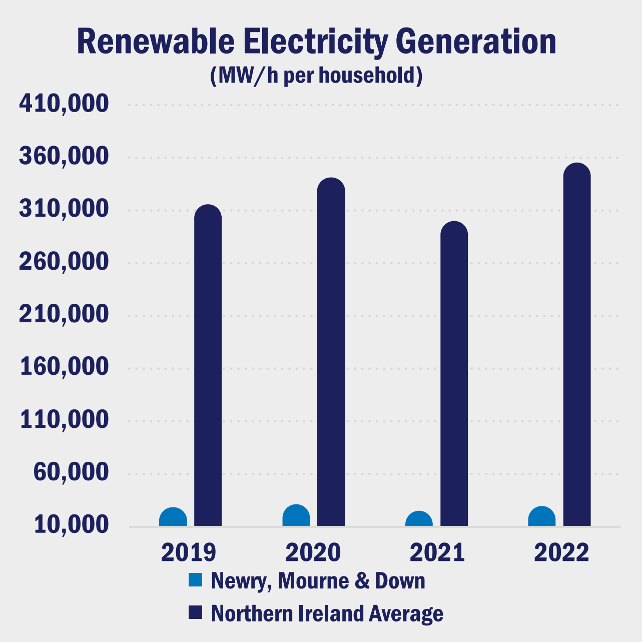


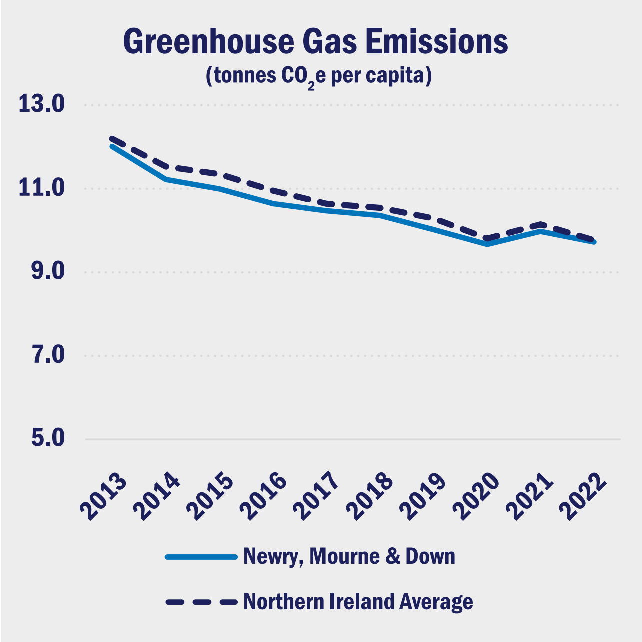


Source: Labour Force Survey, NISRA

- **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 & 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)**	
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