MID & EAST ANTRIM DISTRICT

LOCAL DEVELOPMENT PLAN PREPARATORY STUDIES

PAPER 3: EMPLOYMENT & ECONOMIC DEVELOPMENT

FEBRUARY 2015

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PURPOSE OF THE PAPER

The purpose of this paper is to provide the Shadow Council with an overview of the employment & economic development base in the Mid & East Antrim District Area and to consider the land requirements for economic development uses up to 2030.

This paper sets out the regional context for formulating Local Development plan policies for economic development. It then provides an overview of existing provision and take-up of zoned economic development land in the Ballymena Area Plan 1986-2001, Larne Area Plan 2010, Carrickfergus Area Plan 2001 & BMAP so far as it refers to the Carrickfergus area. A socio-economic profile of the Mid & East Antrim District is also presented.

This paper allows members to commence consideration of how economic policy may be formulated within the context of the RDS and the Strategic Planning Policy Statement.

However, at this stage the paper only aims to provide a foundation for developing the economic development component of the LDP. The evidence base on this topic will need to be further informed by more detailed surveying and evaluation of existing industrial land and zoned industrial land, a Sustainability Appraisal and public consultation.

An addendum to this paper will be provided at a later stage in the plan process. This will provide an indication of how many jobs are required to cater for a growing population and to address issues such as unemployment and deprivation. How these jobs can be accommodated across employment sectors and translated into a need for additional employment land up to 2030 will also be considered.

Together with the initial papers on Population and Growth, Housing & Settlement and the upcoming Town Centre paper, this preparatory work will build the evidence base for the new LDP. This evidence base will be supplemented with information gathered as part of the Community Planning process. When substantially in place, the evidence base will provide a robust foundation for the Council in bringing forward a plan strategy for Mid & East Antrim District to replace that contained in the existing Area Plans.

AIMS

- To build the capacity of members to make informed planning decisions, particularly within the plan making context;
- To provide essential baseline information which will inform planning policy making at local level and ensure that the final LDP is robust and defensible;
- To link with important ongoing work in relation to the development of a Community Plan and other strategic work being undertaken by the Council.

CONTENT OVERVIEW

The paper provides-

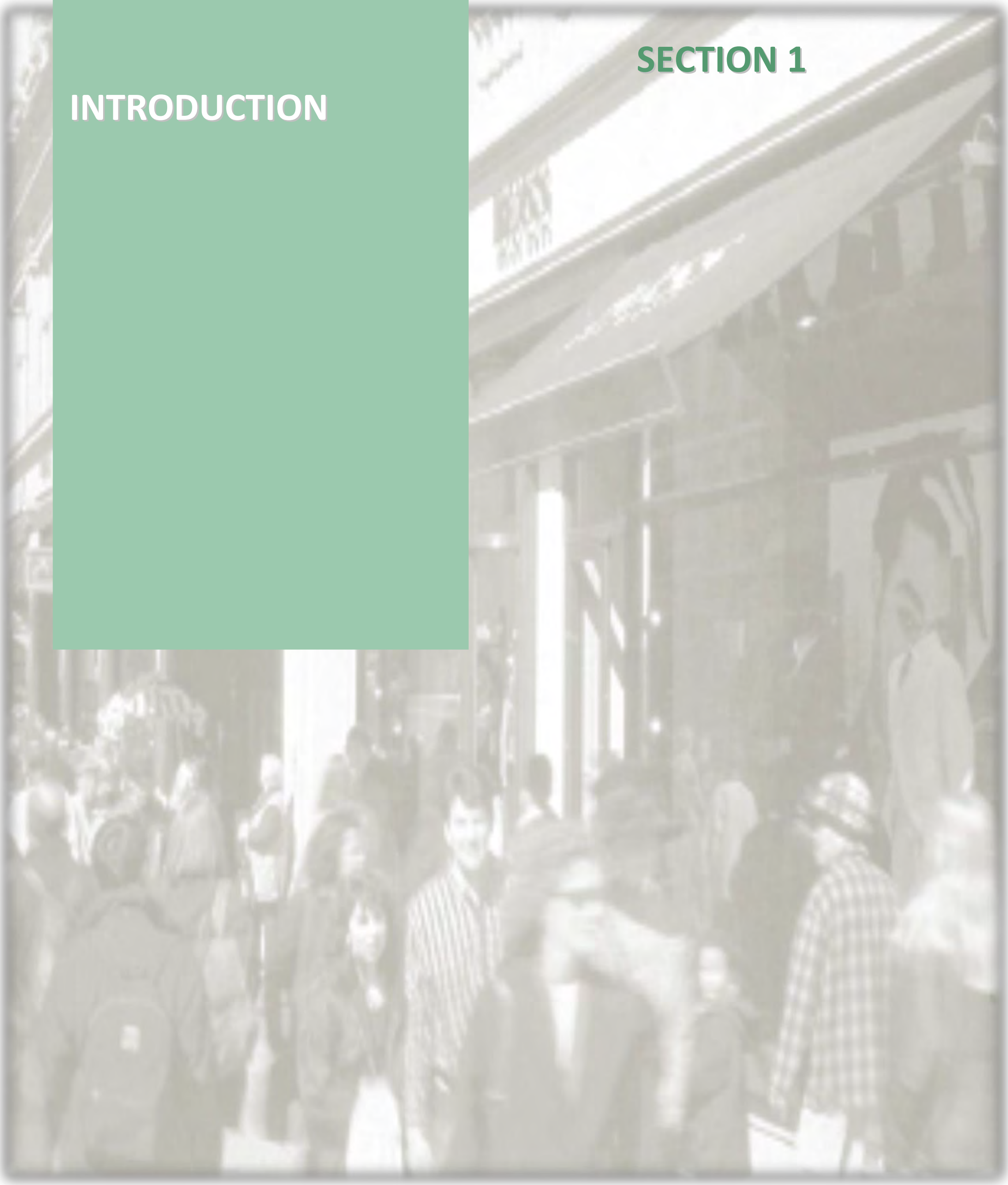
i. the regional & local policy context for formulating Local Development Plan policies for economic development;

ii. a socio-economic profile of the Mid & East Antrim District;

iii. an overview of existing provision and take up of zoned industrial/economic development land in the existing area plans within the Mid & East Antrim District;

RECOMMENDATION

That the Shadow Council consider the findings and considers how future economic growth should be accommodated across the district.



SECTION 1

INTRODUCTION

1.0 INTRODUCTION

1.1 This paper identifies the regional economic policy context for formulating Local Development Plan strategies & policies contained in the Regional Development Strategy 2035 (RDS), the emerging Strategic Planning Policy Statement (SPPS), and relevant existing planning policy statements. The RDS provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a co-ordinated approach to the provision of services, jobs and infrastructure. It provides Regional Guidance to ensure an adequate supply of land to facilitate sustainable economic growth (RG1). This means protecting zoned land and promoting economic development opportunities in the Hubs (SFG11) – (see paragraph 2.3).

1.2 The paper will examine the employment & economic base of the new council area. It will also provide an indication of the uptake of industrial zoned land in the existing three Districts within Mid & East Antrim.

1.3 As highlighted in the previous papers, the new District comprises all of the existing districts of Ballymena, Carrickfergus and Larne save for a small area of the existing Carrickfergus District in the vicinity of Greenisland, which will be transferred to Antrim & Newtownabbey District. Unfortunately, it has not been possible to obtain reliable statistics for the area subject to the boundary change; therefore, the data used includes this small area.

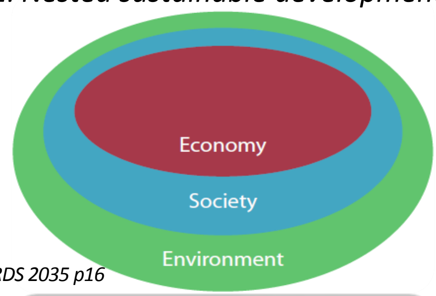
1.4 Information has been derived from the Northern Ireland Statistics and Research Agency (NISRA), DETI, Invest NI and DOE Planning Industrial Monitor.

1.5 The NI Executive's top priority is growing a sustainable economy & investing in the future by improving competitiveness & building a larger more export-driven private sector. Balanced regional growth is an underlying principle to rebuilding & rebalancing the economy as are the principles of equality & sustainability. Similarly, Mid & East Antrim have listed 'Growing the Economy' as one of the five strategic priorities for the new council in its emerging Corporate Plan.

1.6 Spatial planning and related infrastructure development is essential to enable a working economy. Whilst it is not the role of the Local Development Plan to create employment, the Plan Proposals can seek to promote and encourage job creation by establishing a framework, which is supportive to employment and business needs and responsive to the needs of the community.

1.7 Mid & East Antrim Council will lead a community planning process and work with a range of agencies and interests to develop and implement a shared vision for promoting the well-being of the area. The new council can create a spatial Local Development Plan, to provide a realistic vision of how the area should change and what it should be like in the future. Council will have the power to manage most development in the area and enforce planning decisions, which will help place a sharper focus on local economic development.

Fig.1.1: Nested sustainable development



Source: RDS 2035 p16

SECTION 2

REGIONAL POLICY CONTEXT

REGIONAL DEVELOPMENT STRATEGY 2035

REGIONAL PLANNING POLICY STATEMENTS

EUROPEAN LEGISLATION

OTHER RELEVANT GOVERNMENT STRATEGIES

ECONOMIC DEVELOPMENT IN THE RURAL AREA:
REGIONAL DEVELOPMENT STRATEGY 2035

REGIONAL PLANNING POLICY STATEMENTS

2.0 REGIONAL POLICY CONTEXT

2.1 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and local housing policy is provided in the following sections:

REGIONAL DEVELOPMENT STRATEGY 2035: BUILDING A BETTER FUTURE (RDS)

2.2 The Regional Development Strategy 2035 (RDS), published on the 15th March 2012, is the spatial strategy of the Executive. It informs the spatial aspects of the strategies of all Government Departments and has a statutory basis. It is prepared under the Strategic Planning (Northern Ireland) Order 1999. Under that Order the Department for Regional Development (DRD) is responsible for formulating a strategy for the long term development of Northern Ireland.

> ***"An outward-looking, dynamic and liveable Region with a strong sense of its place in the wider world; a Region of opportunity where people enjoy living and working in a healthy environment which enhances the quality of their lives and where diversity is a source of strength rather than division." (RDS Vision)***

2.3 Whilst the RDS recognises the important role played by Belfast and Derry/Londonderry in generating prosperity it also reflects the Programme for Government approach of balanced sub-regional growth to ensure that all places benefit from economic growth and recognises the importance of key settlements as centres for growth & investment. One of the key issues, which influenced the Spatial Framework with the RDS, included the importance of Main Hubs & Clusters well placed to benefit from and add value to regional economic growth. The RDS recognises Ballymena and Larne towns as main hubs. Larne is also identified as a gateway due to its strategic coastal location with a natural harbour and as it is the second largest port in Northern Ireland. Carrickfergus is grouped within the major conurbation known as the Belfast Metropolitan Urban Area.

2.4 The RDS Regional Guidance seeks to ensure an adequate supply of land to facilitate sustainable economic growth (RG1) through the following means:

1. **Assess the quality and viability of sites zoned for economic development uses in the area plans.**
2. **Protect zoned land -** in Development Plans, as it provides a valuable resource for local and external investment.
3. **Promote economic development opportunities across the region focussed on the BMUA, Londonderry and Hubs as the main centres for employment and services –** to capitalise on development opportunities provided by the concentration of people & goods combined with infrastructure & clustering of a range of business services essential to economic development.
4. **Provide a network of economic development opportunities –** by making provision in development plans for an adequate & continuous supply of land for employment purposes.

2.5 To ensure the council area is well placed to accommodate growth in jobs & businesses there should be an adequate and available supply of employment land. It should be accessible and located to make best use of available services for e.g. water & sewerage infrastructure, whilst avoiding, where possible, areas at risk from flooding. To aid consideration, the RDS provides an ***Employment Land Evaluation Framework***, which will enable Mid & East Antrim Council to identify robust & defensible portfolios of both strategic and locally important employment sites in their development plan (Table 2.1).

Table 2.1: The Employment Land Evaluation Framework

Stage 1 **Taking Stock of the Existing Situation**	• An initial assessment of the 'fitness for purpose' including the environmental implications of the existing employment land portfolio. • This is principally in order to identify the 'best' employment sites to be retained & protected and identifying sites that should clearly be released for other uses.
Stage 2 **Understanding Future Requirements**	• Quantify the amount of employment land required across the main business sectors during the development plan period. • This is achieved by assessing both demand and supply elements and assessing how they can be met in aggregate by the existing stock of business premises and by allocated sites. • Account should also be taken of turnover of existing sites due to relocation or closures. Both short/medium term and strategic provision need to be considered in this process.
Stage 3 **Identifying a 'New' portfolio of sites**	• Devise qualitative site appraisal criteria to determine which sites meet the occupier or developer needs. • Confirm the existing sites to be retained, replaced or released, and any gaps in the portfolio. • In this allocation, consideration should be given to previously used sites, and in the reallocation, the environmental impact of one site relative to others should be included. • The results of Stage 2, together with this site appraisal should provide a robust justification for altering allocations for employment land.

2.6 The RDS also contains Spatial Framework Guidance to promote economic development opportunities at Hubs (SFG11). To achieve this it seeks to:

1. **Promote & exploit the potential for economic development** – Hubs are all performing economic roles & have potential for further economic expansion. Small businesses & service sector offices could locate in these towns.

2. **Consider Hubs & clusters of Hubs first** – when new development is being considered, the relationship & benefits between towns/cities in the clusters should be taken into account. The Hub & the higher performing town/city in the cluster should be considered first in the decision process.

2.7 The Spatial Framework Guidance also seeks to promote the regeneration of Carrickfergus town centre. This guidance highlights that it will be important that Carrickfergus extends its economic base to serve its catchment and as a means of reducing its role as a dormitory town.

2.8 Ballymena town is recognised as a significant retail centre, which is complemented by nearby tourism attractions, including the Causeway Coast & Glens and historic features such as Slemish Mountain. The Gateway of Larne is recognised for its strategic coastal location and having the second largest port in NI. Its unique position provides strong linkages with south-west Scotland and its road & rail links form part of the Trans-European Networks (TENs) Route and Larne's position on the Causeway Coastal Route has the potential to create a centre for tourism. In addition it is also and important location for power generation and for gas & electricity interconnectors with Scotland.

2.9 The Framework promotes co-operation between places & encourages clustering of Hubs so that services do not need to be duplicated but rather shared. The RDS notes that the towns of **Ballymena**, **Antrim** & **Larne** are well connected and have the potential to cluster. A rail link and proximity to the International Airport gives this cluster a potential advantage in attracting business.

REGIONAL PLANNING POLICY STATEMENTS

Planning Policy Statement 4 (PPS4): Planning & Economic Development & A Strategic Planning Policy Statement for Northern Ireland (draft SPPS)

2.10 The RDS, is complemented by the DOE's Planning Policy Statements, the most relevant of which is *PPS4: Planning & Economic Development*, which sets out the Department's planning policies for economic development uses and indicates how growth associated with such uses can be accommodated & promoted in development plans.

2.11 This document is to be replaced by the *Strategic Planning Policy Statement*, a Draft of which was issued for consultation in February 2014. The draft SPPS does not represent a significant change to economic development policy but helps to shorten and simplify the guidance for Councils.

2.12 The aim of the Draft SPPS is to facilitate the economic development needs of NI in ways consistent with the protection of the environment and the principles of sustainable development.

2.13 Both PPS 4 & Draft SPPS set regional policy objectives for economic development, which are to:-

- promote sustainable economic development in an environmentally sensitive manner;
- tackle disadvantage & facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development & a choice and range in terms of quality;
- sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
- support the re-use of previously developed economic development sites & buildings

where they meet the needs of particular economic sectors;
- promote mixed-use development & integration between transport, economic development and other land uses, including housing; and
- ensure a high standard of quality & design for new economic development.

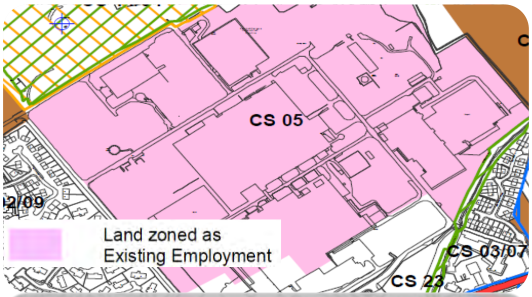
These objectives relate to economic development uses comprising industrial, business and storage & distribution uses, as currently defined in Part B 'Industrial and Business Uses' of the [Planning (Use Classes) Order (Northern Ireland) 2004].

The Role of Local Development Plans

2.14 The Local Development Plan should:

1. **Zone** an ample supply of suitable land to meet economic development needs within the plan area in a range of sites offering a choice of size & location, to promote flexibility & provide for the varying needs of different types of economic activity. Account should also be taken of factors such as:

- accessibility by all members of the community;
- the availability of adequate infrastructure;
- the specialised needs of specific economic activities;
- potential environmental impacts; and
- compatibility with nearby uses



2. Where appropriate, **specify the type OR range of economic development uses that will be acceptable within zoned sites** or broader areas designated by the Plan.

- Within larger settlements such as towns and cities, the Plan may zone individual sites for a particular industrial and business use class, such as Class B1 Business, Class B2 Light Industrial, Class B3 General Industrial & Class B4 Storage & Distribution.
- The plan may also set out restrictions as to where particular types of economic development should be located in order to meet particular Plan objectives.
- Within villages and small settlements, the LDP will not normally zone land for economic development purposes, as this could inhibit flexibility. However, favourable consideration will be given to an economic development proposal where it is of a scale, nature and design appropriate to the character of the particular settlement.

3. Have in place a **system to monitor** the take up and loss of land allocated for economic development purposes as well as ongoing assessment of future requirements & trends to help to identify any shortfalls that may arise or highlight the need to reallocate inappropriate or unmarketable sites for alternative uses.

4. **Identify previously developed land** for economic development – to allow the return of vacant or underused land to productive use and to create more attractive environments, reducing the need for greenfield development and with the potential to assist economic regeneration and physical renewal.

5. **Identify opportunities for mixed use development**, including economic development uses, where this would create synergy and underpin the economic viability of the development as a whole - **Key Site Requirements** in the LDP should indicate the types of economic development that will be acceptable and major mixed used sites should be directed to sustainable locations; served by public transport, have adequate infrastructure and that could be integrated in terms of land use and design.

6. Normally contain a number of **supporting actions** that will ultimately deliver sustainable and high quality development – this includes **Key Site Requirements** to ensure that developers provide necessary infrastructure

such as road access, access for pedestrians and cyclists, water supply, sewerage and land drainage. The Plan may also provide guidance in terms of key design, layout and landscaping requirements.

EUROPEAN LEGISLATION

2.15 Directive 96/82/EC, known as the Seveso II Directive, was implemented in Northern Ireland by the Control of Major Accident Hazards (COMAH) Regulations (NI) 2000 and the Planning (Control of Major-Accident Hazards) Regulations (NI) 2000. Article 12 of the Directive refers specifically to land-use planning. The aim of this Article is to prevent major accidents at sites where processes that involve hazardous materials are used. Limiting the consequences of such accidents is taken into account in preparing land-use planning policies and under Article 12, the Department is obliged to set up appropriate consultation procedures to facilitate implementation of the above Regulations.

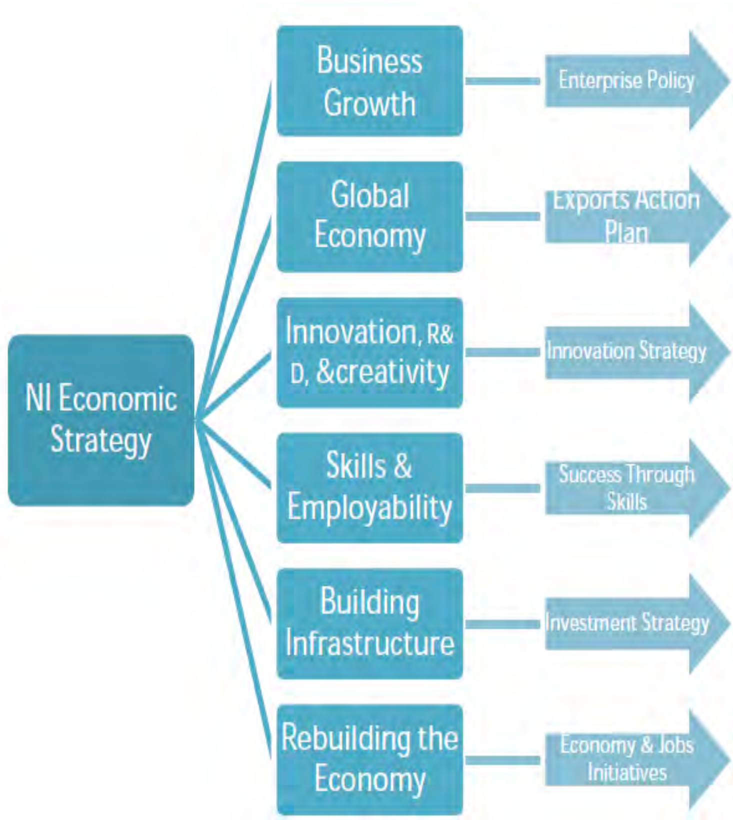
2.16 The determination of planning permission for such proposals is subject to the current regional policies, planning policy statements and in particular Development Control Advice Note 12 (DCAN 12) – Planning Controls for Hazardous Substances.

OTHER RELEVANT GOVERNMENT STRATEGIES

(i) Northern Ireland Executive – Economic Strategy: Priorities for Sustainable Growth & Prosperity (March 2012)

2.17 Based on the Executive's vision and priorities for sustainable economic growth and prosperity, the overarching goal of the Strategy is to improve the economic competitiveness of the Northern Ireland economy, with particular focus given to export led economic growth and a shift away from the traditional dependence on the public sector. The Economic Strategy also promotes innovation, research & development and workforce skills as key drivers. Within the Economic Strategy emphasis is also placed on the need to rebalance the economy towards a higher value added private sector activity, as well as outlining actions and investments to aid the rebuilding of the local economy (Fig. 2.1).

Fig.2.1: Key areas for action within NI Economic Strategy



(ii) Anti-Poverty and Social Inclusion Strategy

2.18 The Government's "Anti-Poverty Strategy" (Lifetime Opportunities) was published by the OFMDFM in 2006. It outlines a set of ambitious and challenging long-term goals and targets to work towards eliminating poverty and social exclusion in Northern Ireland by 2020. Public policy in general is expected to take account of anti-poverty/social inclusion considerations, for example through enabling disadvantaged groups and communities to benefit from better access to employment opportunities.

2.19 One of the main functions of a Development Plan is to facilitate development & create a land use framework that will allow investment to take place. For instance, the re-use of previously developed land has an important role to play not only in the supply of sites for economic development, but it can also help to support the Anti-Poverty & Social Inclusion Strategy. This is done through assisting economic regeneration & physical renewal, helping to stimulate enterprise in the most disadvantaged areas in order to tackle long-term unemployment and issues of employability.

ECONOMIC DEVELOPMENT IN THE RURAL AREA

REGIONAL DEVELOPMENT STRATEGY 2035

2.20 For the purpose of the spatial framework in the RDS, those places outside the Principal Cities, the Main & Local Hubs are identified as constituting the rural area.

2.21 Agriculture is the largest business category in rural areas. Other sectors include construction, tourism, forestry, minerals & renewable energy. The RDS recognises that the mobility of rural dwellers is of the utmost importance so that they can access & benefit from employment opportunities both locally and at a wider regional level. The Strategy sees new development & employment opportunities, which respect local, social & environmental circumstances as requirements to sustain rural communities. This means facilitating the development of rural industries, businesses & enterprises in appropriate locations, and ensuring they are integrated appropriately within the settlement or rural landscape. The expansion of rural tourism and associated development that is both sustainable & environmentally sensitive is encouraged.

REGIONAL PLANNING POLICY STATEMENTS

Planning Policy Statement 21 (PPS21): Sustainable Development in the Countryside

2.22 PPS21 became effective on 1 June 2010 and sets out planning policies for development in the countryside. For the purpose of this document, the countryside is defined as land lying outside of settlement limits as identified in development plans. The provisions of this document currently apply to all areas of Northern Ireland's countryside. One of the objectives of PPS21 is to facilitate development necessary to achieve a sustainable rural economy; including appropriate farm diversification and other economic activity.

Planning Policy Statement 16: Tourism

2.23 PPS16 became effective in June 2013, and one of the objectives of this PPS is to contribute to the growth of the regional economy by facilitating tourism growth.

A Strategic Planning Policy Statement for Northern Ireland (draft SPPS).

2.24 The Draft SPPS advocates that councils should adopt a positive approach to sustainable economic development in the countryside, including tourism, in order to promote a healthy rural economy, thereby supporting rural communities.

2.25 In relation to economic development and tourism in the countryside, the Draft SPPS sets policy objectives aimed at:

- managing growth to achieve appropriate and sustainable patterns of development which supports a **vibrant rural community**;
- **conserving the landscape and natural resources of the rural area** and to protect it from excessive, inappropriate or obtrusive development and from the actual or potential effects of pollution;
- facilitating development which contributes to a **sustainable rural economy**; and
- promoting **high standards in the design, siting and landscaping** of development.

2.26 To achieve these objectives the policy approach is to facilitate proposals likely to benefit the rural economy while protecting & enhancing the environment. **Farm diversification**, the **re-use of rural buildings** and **appropriate redevelopment and expansion proposals** for industrial & business purposes or tourism will normally offer the greatest scope for sustainable economic development in the countryside. The policy recognises that occasionally such proposals may involve the construction of new buildings.

2.27 Council will be required to bring forward a Plan Strategy for economic development & tourism in the countryside to reflect the aim, objectives & policy approach of the SPPS tailored to the specific circumstances of Mid & East Antrim District. The Plan Strategy, local policies & proposals for economic development and tourism in the countryside may be formulated.

SECTION 3

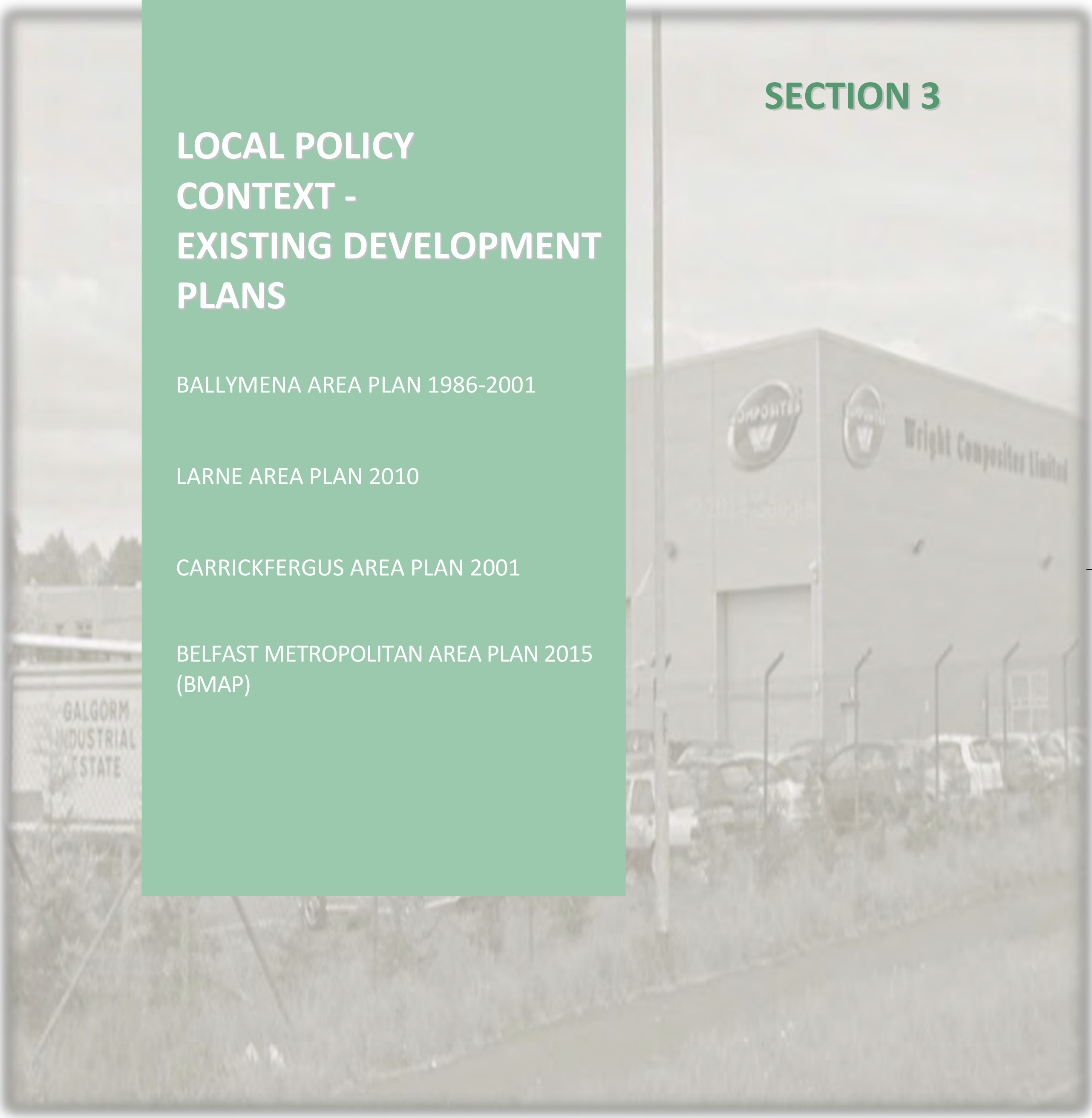
LOCAL POLICY CONTEXT - EXISTING DEVELOPMENT PLANS

BALLYMENA AREA PLAN 1986-2001

LARNE AREA PLAN 2010

CARRICKFERGUS AREA PLAN 2001

BELFAST METROPOLITAN AREA PLAN 2015 (BMAP)



3.0 LOCAL CONTEXT – EXISTING DEVELOPMENT PLANS

BALLYMENA AREA PLAN 1986-2001

3.1 The Ballymena Area Plan 1986-2001 was adopted in November 1989. Ballymena town was recognised as the focus of industrial employment within the district. At the time of this Plan's preparation, a considerable amount of land previously zoned for industry remained undeveloped. Large-scale industry was encouraged to locate to sites designated in the urban area (Table 3.1 & Appendix A: Fig A1 & A2).

Table 3.1: Location of land zoned for industry in Ballymena District

Location	Land Zoned (Ha)
Woodside Road	63
Galgorm	8
Ballymena Town Total	**71**

Source: BAP 1986-2001

3.2 In all settlements, appropriate small-scale industrial uses were welcome on suitable sites but it was considered more appropriate to consider sites on merit in these settlements rather than apply prescriptive zonings. In rural areas, the Plan stated that permission would normally be given for small-scale commercial & industrial activities in existing buildings such as disused agricultural or commercial buildings or on derelict sites provided there were no amenity issues.

LARNE AREA PLAN 2010 (LAP)

3.3 Adopted in March 1998, the Larne Area Plan 2010 pre-dated publication of the RDS 2025 in September 2001. Large-scale industrial uses were to be accommodated in Larne town and land was allocated to ensure that sufficient sites were available to meet future needs (Table 3.2 & Appendix A: Fig. A3-A5).

Table 3.2: Location of land zoned for industry in Larne District

Location	Land Zoned (Ha)
Ballyloran (previously zoned)	4.2
Drumahoe	31.7
Larne Harbour	35.25
Larne Town Total	**71.15**

Source: LAP 2010

3.4 In addition an area of 11.42 hectares was zoned at Bank Road as a mixed use development site to accommodate industrial, housing & leisure uses (Appendix A: Fig. A6). This Plan also required that all industrial development was designed to a high standard and properly landscaped.

3.5 In Carnlough a small-scale industrial/business site (approximately 0.4 hectares) was also zoned.

CARRICKFERGUS AREA PLAN 2001 (CAP)

3.6 The Carrickfergus Area Plan 2001 was adopted in March 2000. It confirmed that industry in the Borough was concentrated in Carrickfergus town. It also advised that at this time there were 3 industrial estates: Tropperslane (held by IDB) and the private estates of Carrickfergus Industrial Centre & Kilroot Business Park. A number of smaller scale industrial operations were also located within the town.

3.7 CAP 2001 stated that the Department was keen to facilitate the development of new businesses on suitable sites and encourage the appropriate future expansion requirements of existing firms. It was the Plan's policy to accommodate major industrial development in Carrickfergus town (Table 3.3 & Appendix A: Fig A7 & A8).

Table 3.3: Location of land zoned for industry in Carrickfergus District

Location	Land Zoned (Ha)
Tropperslane Industrial Estate	21
Kilroot Business Park	43.5
Carrickfergus Town Total	**64.5**

Source: CAP 2001

3.8 In addition the plan recognised that there were sites within the town which had potential to be developed for industrial purposes but which had not been zoned. CAP 2001 also stated that there may be scope for small scale enterprises to locate on appropriate sites in Greenisland & Whitehead.

BELFAST METROPOLITAN AREA PLAN 2015 (BMAP)

3.9 BMAP, as adopted, became operative on 9 September 2014 and replaces Carrickfergus Area Plan 2001. Some of the key components of the BMAP include:

- Supporting Economic Development
- Promoting Urban Renewal
- Sustaining a Living Working Countryside
- Developing an Integrated Inclusive Transport System

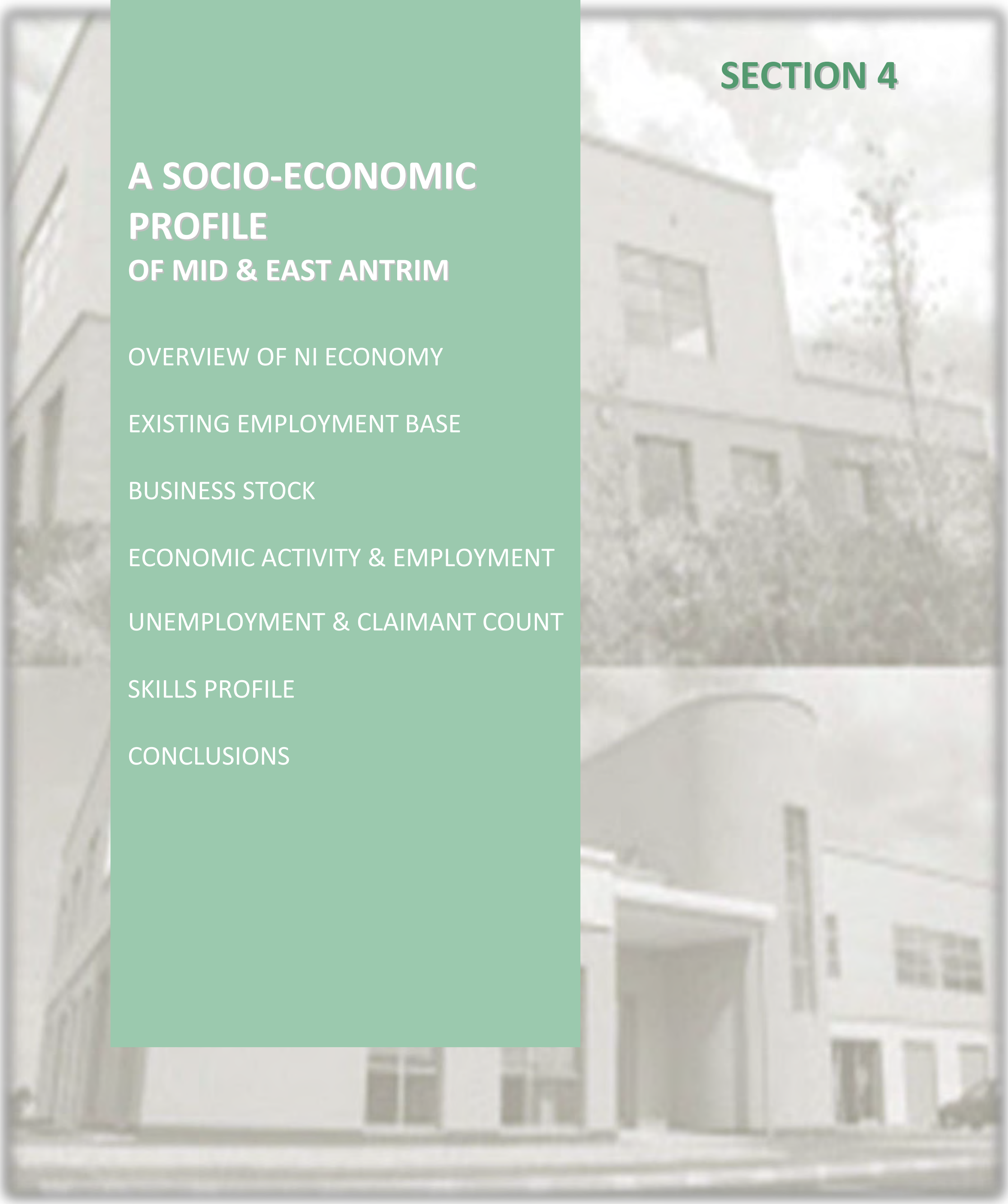
3.10 The BMAP employment strategy seeks to sustain balanced economic growth and job creation by promoting City and Town centres as the focus for retail and office functions along with providing a generous and continuous supply of land with a balanced portfolio of sites throughout the plan area.

3.11 Part 4 Volume 4 of BMAP 2015 sets out policies on Carrickfergus District. A total of **151 hectares** of land were allocated to be zoned for employment use in Carrickfergus. All of this land was existing employment land, which either was:

- Undeveloped, partially developed or developed zonings from the Carrickfergus Area Plan 2001 or other lands currently in employment use.

3.12 These lands include a significant area of remaining capacity at Kilroot Business Park (68.20 hectares), small pockets of land at Troopersland owned by Invest NI and the private industrial estate at Carrickfergus Industrial Centre where there is potential for redevelopment (29.98 hectares) (Appendix A: Figs A9-A14). Acceptable Uses on these employment zonings are as follows:

- call centre;
- business for research & development;
- light & general industrial; and
- storage or distribution.



SECTION 4

A SOCIO-ECONOMIC PROFILE
OF MID & EAST ANTRIM

4.0 A SOCIO-ECONOMIC PROFILE OF MID & EAST ANTRIM DISTRICT

4.0 ECONOMIC CHARACTERISTICS

4.1 Economic activity, unemployment levels and income are indicators of the economic well-being of a population. This section provides an overview of the employment and economic base of the Mid & East Antrim council area within the context of the Northern Ireland economy, and examines employment sectors, unemployment and economic activity rates.

OVERVIEW OF NORTHERN IRELAND ECONOMY

4.2 It is a widespread view that Northern Ireland has suffered from the recession to a greater extent than any other UK region. Recovery in the labour market has been slow and employment is not expected to recover to its pre-recession peak until well beyond 2023 (Oxford Economics, 2014). Similar to trends in the UK overall, manufacturing employment is expected to continue declining with a shift towards more exportable service sectors such as administrative & professional services, software and ICT, scientific/technical and retail to drive job creation.

4.3 The Knowledge Economy is an important and growing component of the regional economy and increased output with less employment reflects the changing role of manufacturing. The Knowledge Economy includes a broad range of sectors including:

- IT services & telecommunications;
- Creative content & digital media;
- Computing & advanced electronics;
- Software & digital content;
- Pharmaceuticals, biotechnology & medical services; and
- Aerospace & other transport equipment (NICEP, 2014).

Other growth areas include environmentally sustainable products including recycling activities and those linked to renewable energy; and the agri-food sector.

4.4 A feature of Northern Ireland is its consistently high rate of economic inactivity in comparison with other regions of the UK. Economic inactivity rates have remained within a stable range of 26% and 32% of the working adult population in Northern Ireland since the mid 1980s. The NI Executive intends to address the issue through a range of new measures designed to help individuals in targeted inactive groups make the transition into work. The strategic goal is to contribute towards a stable and competitive employment rate of 70% by 2023. Factors identified within *Enabling Success: A Strategic Framework for reducing economic inactivity in Northern Ireland* (2014) – as affecting employability at local level are:

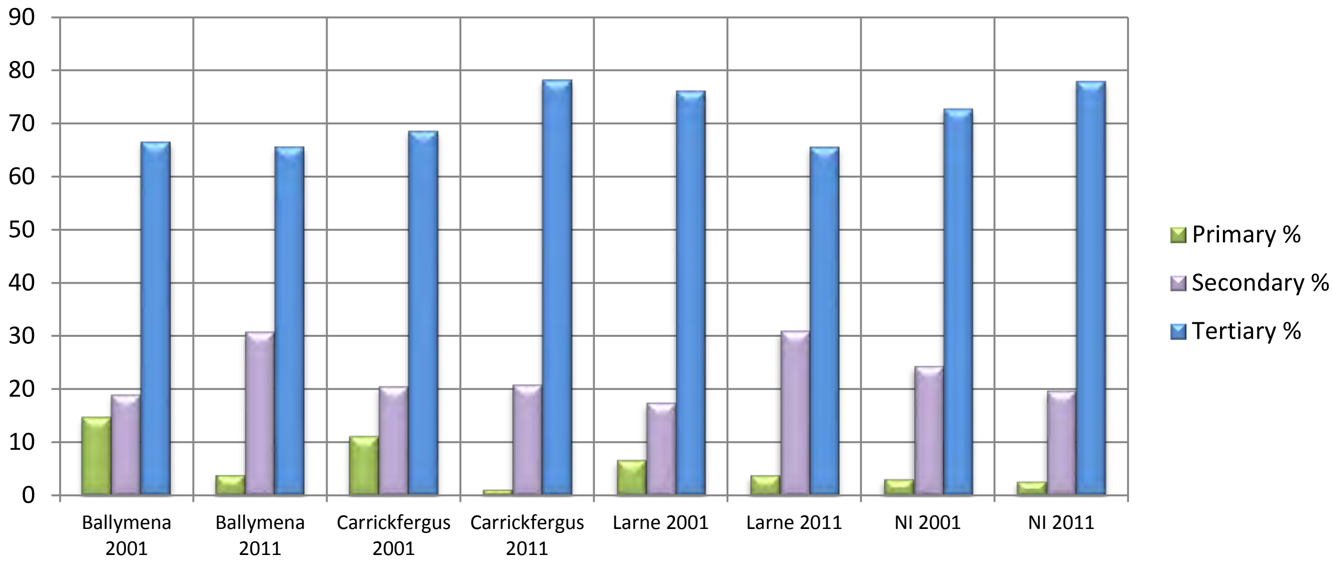
- local labour market demand,
- quality of jobs available (pay & flexibility),
- access barriers,
- transport isolation (rural),
- transport deprivation (urban) and;
- childcare/social care provision.

EXISTING EMPLOYMENT BASE

4.5 Employment may be classified into three sectors: primary, secondary & tertiary.

Primary	Includes: ▪ agriculture, ▪ forestry, ▪ extraction of natural resources.
Secondary	Concerned with: ▪ manufacturing, ▪ processing of natural resources.
Tertiary	Primarily concerned with service provision such as: ▪ public administration, ▪ education, ▪ health, ▪ retailing, ▪ banking, ▪ catering, ▪ transportation & ▪ communications.

Fig.4.1: Illustration of Employment Sectors in NI, Ballymena, Carrickfergus & Larne Districts- 2001 & 2011



Source: NISRA Census 2001 Employment Sectors KS11a & Census 2011 Employment Sectors WP603NI

4.6 In the period 2001 to 2011, the employment sector pattern of the three districts reflected the NI trend of a fall in the primary sector, with a marked drop in Ballymena & Carrickfergus districts. In the tertiary sector, Carrickfergus followed the NI trend with an increase however; both Ballymena & Larne both experienced a drop in this sector. By 2011, all three districts had a higher percentage of employment in the secondary sector compared to the regional average and indeed the percentage share in this sector increased from 2001 in each district (Fig. 4.1 & Table 4.1).

Table 4.1: Employment by Sector- 2011

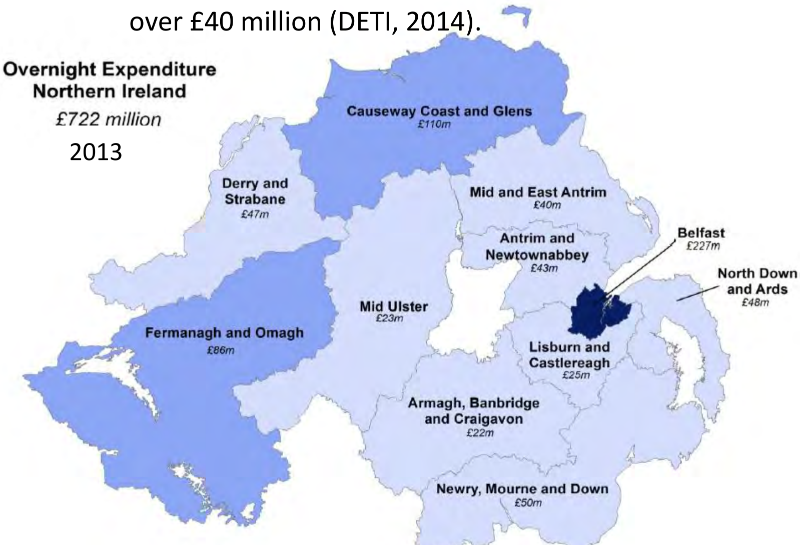
	Sector		
	Primary	**Secondary**	**Tertiary**
N. Ireland	18,170 **(2.55%)**	141,740 **(19.56%)**	564,613 **(77.89%)**
Mid & East Antrim	1,560 **(3.20%)**	13,948 **(28.60%)**	33,260 **(68.20%)**
Ballymena	1,046 **(3.78%)**	8,487 **(30.64%)**	18,170 **(65.58%)**
Carrickfergus	111 **(1.09%)**	2,110 **(20.74%)**	7,955 **(78.17%)**
Larne	403 **(3.7%)**	3,351 **(30.78%)**	7,135 **(65.52%)**

Source: NISRA Census 2011 Employment Sectors WP603NI

4.7 Whilst the largest percentage of jobs in Mid & East Antrim in 2011 were in the tertiary sector which was similar to the N. Ireland trend, a significantly higher percentage of the jobs within the district were in manufacturing (secondary sector) than in N. Ireland as a whole. This can be attributed to large companies such as Wrightbus, Michelin, JTI (Gallaher Group), Moy Park and FG Wilson which have factories within the district. Also in Carrickfergus three large industrial estates vacated in the 1980s now house vibrant industrial zones, providing commercial and manufacturing facilities to both small indigenous businesses as well as globally recognised brands such as Schrader International, Ryobi and Douglas and Grahame. Ballymena District also had a slightly higher percentage employed in the construction sector than both the district and NI level.

4.8 However, in recent years the manufacturing sector in the district has been impacted upon by job losses, for example 700 jobs were lost at FG Wilsons in 2012 following the relocation of a major part of their generator manufacturing business to the Far East. In addition, the recent announcement that the JTI Gallaher factory in Ballymena will commence redundancies from May 2016, and that the plant will close by early 2017 will result in the loss of more than 800 jobs. Whilst this will have a large impact on the local economy, the land may be released for other industrial and employment uses. There also have been good news stories for example in June 2013, Japanese-based company Terumo BCT, that makes medical devices, announced the creation of 416 new jobs at its factory in Larne.

4.9 The Tourism sector also contributes to the local economy in Mid & East Antrim District; attracting 251,338 overnight visitors (6% of the NI total) in 2013 with an estimated spend of just over £40 million (DETI, 2014).



4.10 Overall, Mid & East Antrim District shows a spread of jobs across the three sectors which is reflective of the whole region albeit with a higher proportion of jobs within the secondary sector. Recent growth in Northern Ireland in office type industries, such as; information technology and financial services, points to a need for a more flexible approach when determining the types of economic development that are acceptable in particular locations. Therefore, land zoned for economic development should be seen as supporting a whole range of uses - apart from retailing – and not just the traditional manufacturing sector.

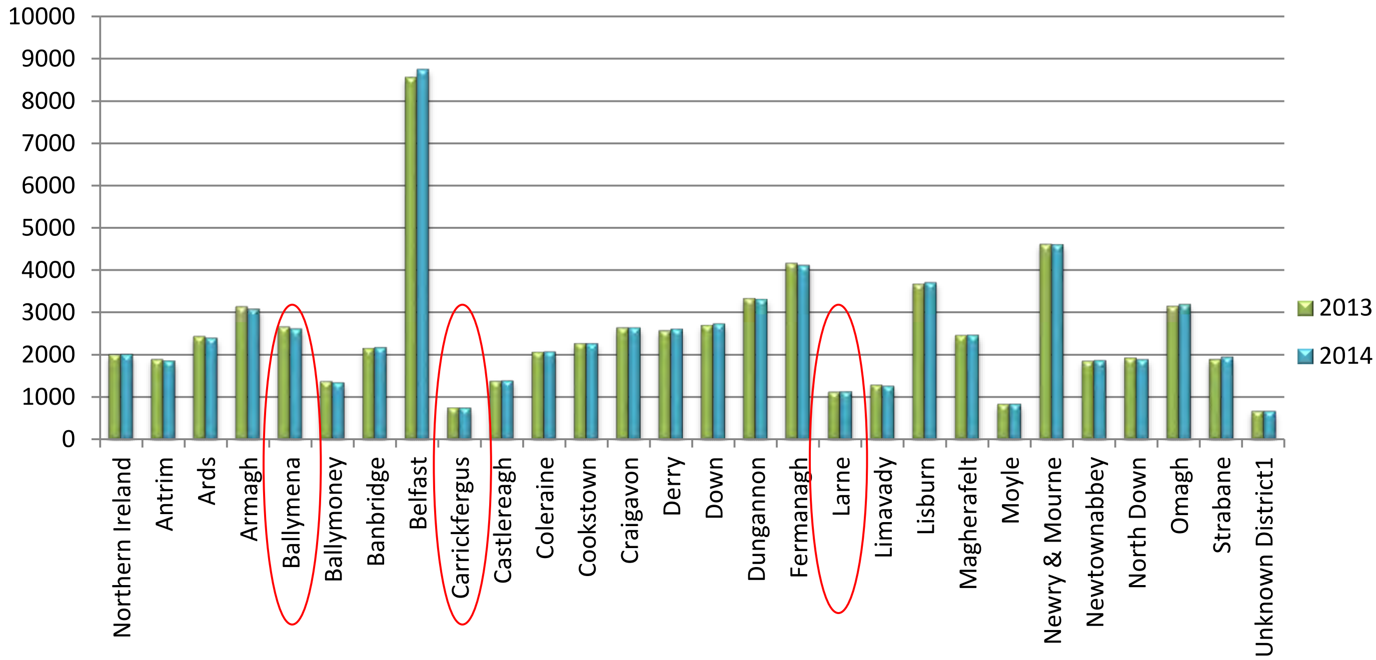
BUSINESS STOCK

4.11 From 2006, the number of VAT and/or PAYE registered businesses in Mid & East Antrim had been increasing from 4,660 to a peak of 4,870 in 2008. However, since 2008 this figure has reduced to **4,500** in 2014 (6.6% of the Northern Ireland total). (DETI, 2013 & DETI 2014). This reflects the overall trend within Northern Ireland.

4.12 In 2013, the largest proportion (29%) of VAT and/or PAYE registered businesses operating within Mid & East Antrim were within the **agricultural, forestry and fishing sectors**, which is marginally higher than the Northern Ireland average of 25%. When the production, construction, and wholesale & retail sectors are included, the percentage proportion for Mid & East Antrim is 62% (NISRA, 2013). Both the birth and death rate for VAT and/or PAYE registered businesses within Mid & East Antrim has fluctuated between 2005 and 2012. The birth rate has decreased from 31% in 2005 down to 20% in 2012, whilst the converse has occurred within the death rate, which has risen from 20% up to 30% in the same period (DETI, 2012).

4.13 As of March 2014, the majority of businesses (78%) within Mid & East Antrim were classified as being micro i.e. employing less than 5 people, which is similar to the NI average of 76%. This illustrates the importance of small businesses & the self-employed in the local economy (DETI, 2014). However, up until the same period there is a low incidence of registrations in the tertiary sector, service sectors such as finance, insurance & ICT, which equate to less than 3% (DETI, 2014).

Fig. 4.2: Number of Vat &/or PAYE registered Businesses Operating in NI by LGD- 2013 & 2014



Source: DETI Note: 'Unknown' District – A small number of companies could not be traced to an LGD and these figures have been included in the NI figure

ECONOMIC ACTIVITY

4.14 In 2011, 69% of the population of Mid & East Antrim were classified as economically active, compared to 66% for NI as a whole. This figure represents a 3% increase on the 2001 figure for Mid & East Antrim. (Table 4.2 & Appendix C: Tables C1 & C2). Much of this growth is as a result of increasing numbers of women entering the job market (Table 4.3). Research from the Inter Departmental Business Register produced by DETI (July 2014) confirms that 47% of those aged 16-64 currently in employment in Northern Ireland are women and female employment has continued to rise over the last 20 years compared with a fall for males. If these trends continue, more women are likely to enter the employment market over the plan period.

Table 4.2: Economic Activity of the Population (16-74 year olds) in 2001 & 2011

	2001 Economically Active		2011 Economically Active	
	Number	%	Number	%
N. Ireland	739,134	**62%**	869,767	**66%**
Mid & East Antrim	14,339	**66%**	15,962	**69%**
Ballymena	27,858	**66%**	32,020	**69%**
Carrickfergus	18,155	**67%**	19,596	**68%**
Larne	14,339	**65%**	15,962	**68%**

Source: NISRA Census 2001 KS09a (admin geographies) & Census 2011 Economic Activity: KS601NI (admin geographies)

Table 4.3: Proportion of Economically Active Males & Females 2001 & 2011

	2001		2011	
	Male	**Female**	**Male**	**Female**
N. Ireland	412,035 **(56%)**	327,099 **(44%)**	460,771 **(53%)**	408,996 **(47%)**
Ballymena	15,422 **(55%)**	12,436 **(45%)**	17,161 **(54%)**	14,859 **(46%)**
Carrickfergus	9,842 **(54%)**	8,313 **(46%)**	10,091 **(52%)**	9,497 **(48%)**
Larne	8,016 **(56%)**	6,323 **(44%)**	8,411 **(53%)**	7,551 **(47%)**

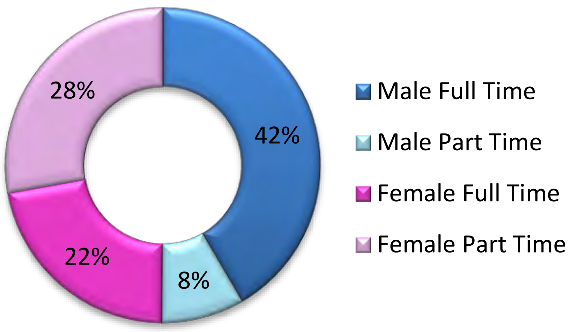
Source: NISRA Census 2001- KS09c & KSO9b & Census 2011- KS603NIa & KS602NIa

4.15 In Northern Ireland, 402,000 women were economically active in April - June 2014 – an increase of 12,000 during the last year. The female working age economic activity rate here of 66.8% was 5.6 percentage points lower than that in GB (72.4%). At 66.8%, the working age economic activity rate for females was 12.9 percentage points lower than that for NI males (79.8%). The difference in economic activity rate between males and females is less than that of five years ago when the difference was 13.5 percentage points (DETI, 2014).

4.16 In terms of male and female employment in Mid & East Antrim, the majority (22.39%) of females currently work in human health and social work activities, followed closely by 22.30% working in the wholesale and retail trade & repairs. In contrast, the majority of males (33.49%) work in manufacturing, and the next largest percentage (16.52%) also work in the wholesale and retail trade & repairs (DETI *Census of Employment* 2013).

4.17 Approximately 54% (11,363) of women in Mid and East Antrim are in part time employment, compared with 17% (3,676) of men.

Fig. 4.3: Percentage of full-time & part-time jobs in Mid & East Antrim by gender

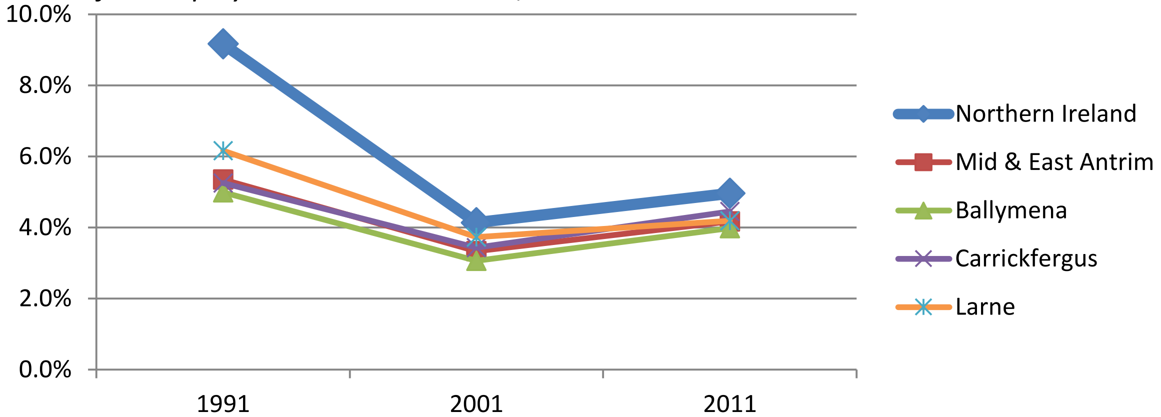


Source: DETI Census of Employment 2013

4.18 NI has the highest percentage of people employed in the public sector when compared to the rest of the UK regions, and employment levels in Mid & East Antrim have a healthy share of public sector jobs. Within each of the three towns in the district there are various public sector employers relating to Health, Education, PSNI & various other Government departments. The NI Executive has highlighted that cuts to Departmental budgets will result in significant job losses. This combined with Welfare Reform and the rise in pension ages may have adverse economic impacts upon the Mid & East Antrim district, which should be monitored through the Community Plan.

UNEMPLOYMENT

Fig 4.4: Rate of Unemployment at Census 1991, 2001 & 2011



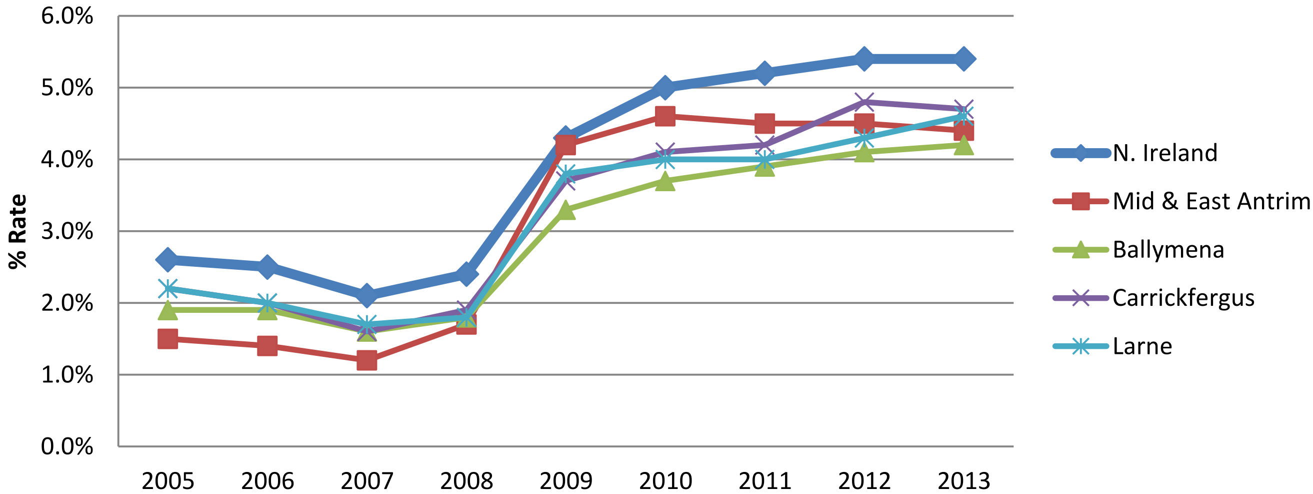
Source: NISRA Census 1991 Economic Activity Report, Census 2001 Economic Activity - All Persons: KS09a (administrative geographies), Census 2011 Economic Activity: KS601NI (administrative geographies)

4.19 In Mid & East Antrim unemployment fell between the 1991 & 2001 Census and had rose again by the time of the 2011 Census. This trend was similar to NI but at a lower level. Since 2005, the unemployment rate in Northern Ireland has been similar to the UK average. This follows a number of years when unemployment was generally lower in Northern Ireland *(NISRA, UK National Wellbeing Measures: NI Data 2014)*.

4.20 The number of persons claiming benefit is a useful guide to the fluctuation of unemployment rates between Census years. Claimant count rates suggest that unemployment further declined after 2001 with the lowest rate of 1.2% recorded in Mid & East district in 2007 being just under the Northern Ireland average (2.1%). From this time until 2010, unemployment rose steadily because of the economic recession. However, from 2010 onwards Mid & East Antrim District reversed the NI trend, with a gradual drop in the number of claimant counts. This was largely due to the low percentage in Ballymena District Council Area (Fig. 4.5: & Appendix D: Table D1, D2 & D3). The monthly claimant figure for December 2014 in Mid & East Antrim District stood at 2,814 (3.1%) and this was a 16.4% decrease over 2014.

4.21 Below district level, the SOA's of Love Lane (8.72%) and Dunclug (8.17%) had significantly higher proportions of unemployed persons at the time of the 2011 Census. Of the top 10 SOA's with the highest percentage of unemployed 5 were located in Carrickfergus District, 4 were within Ballymena District and 1 in Larne District. Eight of the top 10 areas with the lowest percentage of unemployment were located in Ballymena District (Appendix C: Table C5).

Fig. 4.5: Trends in Claimant Count Rates 2005 - 2013



Source: NISRA Claimant Count Annual Averages (administrative geographies)

SKILLS PROFILE

4.22 It is anticipated that future economic growth will move towards more exportable service sectors and if Mid & East Antrim is to follow this trend it will have to supply a suitably skilled and qualified workforce. Education has an important role to play in promoting economic well-being. Better education improves access to employment opportunities, raises productivity and innovation. In addition, it plays a very crucial role in securing economic and social progress and improving income distribution.

4.23 Oxford Economics have forecast that the stock of jobs requiring low or no qualifications is to fall by 60,000 by 2020, leading to a large skills mismatch (Oxford Economics, 2014).

4.24 In this context of continuing change in demand from factory to office based service sector there will be a need for large numbers of individuals to change careers. As their existing skill sets, competencies and experience will fall short of the demand for a skilled workforce, significant up-skilling and re-skilling will be required.

Table 4.4: Qualifications of Population over 16 years of age in Mid & East Antrim District- 2011 & 2001

	Usual residents aged 16 & over 2011	No or Low qualification (%)*	Degree or Higher qualification (%)
N. Ireland	1,431,540	**40.63% (59%)**	**23.65% (16%)**
Mid & East Antrim	108,593	**40.69% (60%)**	**22.11% (15%)**
Ballymena	51,185	**42.31% (61%)**	**22% (14%)**
Carrickfergus	31,409	**38.3 (58%)**	**23.32% (15%)**
Larne	25,999	**40.4% (61%)**	**20.85% (14%)**

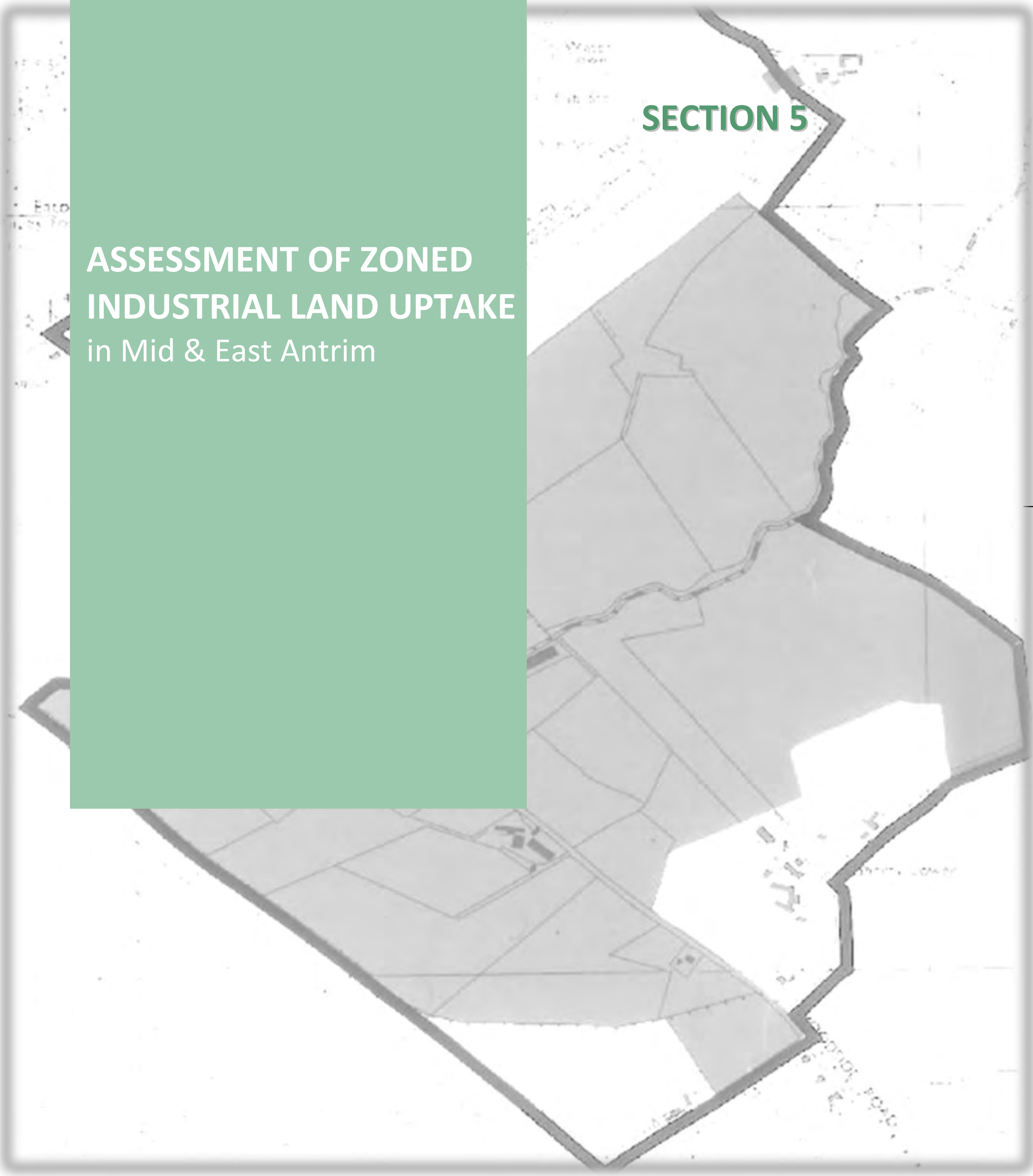
Source: NISRA Census 2011 Highest Level of Qualification by Age LC5101NI (administrative geographies) *No academic or professional qualifications or Level 1: 1-4 O Levels/CSE/GCSEs, Entry Level, Foundation Diploma, NVQ level 1, Foundation GNVQ, Basic/Essential Skills. Note: Figures in ( ) are for 2001 (*Source NISRA Census 2001 Qualifications UV026 (administrative geographies)*

4.25 Since 2001, the proportion of people aged 16 years old and over who had a degree or higher qualification in Mid & East Antrim has increased from 15% in 2001 to 22% in 2011, which reflects the overall pattern in NI during the same period. When compared with the N. Ireland level in 2011, the Mid & East Antrim District had a similar proportion of people aged 16 years old and over who had no or low qualifications and slightly lower proportions of those with a degree or higher qualification (Table 4.4 & Appendix E: Table E1). Educational achievement in parts of the mains towns remain low, particularly Ballee, Ballykeel and Moat (Appendix E: Tables E2-E4, Map E1). A more highly educated workforce with skills to match those emerging employment sectors with export potential is needed.

CONCLUSIONS

4.26 In summary, the main features of the employment situation in Mid & East Antrim can be summarised as follows:

- The level of economic activity has increased within the district between 2001 and 2011.
- Unemployment levels have remained below the regional average, & since 2010 unemployment, levels have gradually continued to fall, in contrast to the trend of rising unemployment for N. Ireland.
- The largest percentage (68%) of jobs is within the tertiary sector, which is 10% lower than the regional average.
- There are a higher percentage of jobs within the secondary sector (29%) when compared to the regional average of 20%, which is due to the high number of jobs within manufacturing in the district.
- The lowest percentages of jobs are within the primary sector (3%) which is similar to the regional average.
- The proportion of economically active females has increased and the majority of female employees work in human health and social work activities.
- The majority (33%) of males work in manufacturing, followed by 17% working in wholesale and retail trade & repairs.
- The majority of businesses (78%) are classified as being micro i.e. employing less than 5 people, compared to the regional average (76%).
- A potential risk to employment levels in the district is the imminent public sector cuts.
- 40% of the population residing in the district have no or low qualifications.



SECTION 5

ASSESSMENT OF ZONED INDUSTRIAL LAND UPTAKE
in Mid & East Antrim

5.0 ASSESSMENT OF ZONED INDUSTRIAL LAND UPTAKE

IN MID & EAST ANTRIM DISTRICT

5.0 INTRODUCTION

5.1 As highlighted in Section 3, the Ballymena Area Plan, Larne Area Plan and Belfast Metropolitan Area Plan each zoned land for industrial purposes in the main towns of Ballymena, Larne and Carrickfergus.

5.2 The amount of land zoned was considered sufficient to meet overall industrial needs to the end of the respective plan periods. Some scope for industrial development on white land was also anticipated with further opportunities for employment provided by mixed business zonings and the restructuring and subdivision of existing or underused industrial premises.

5.3 A desktop survey carried out by DoE Planning in January 2015 has identified remaining capacity within the current industrial zonings (Table 5.1).

BALLYMENA

5.4 In Ballymena, approximately **38 hectares** of zoned industrial land remains undeveloped. This is all located at the Woodside Road, which consists of four main sites. Approximately 16.7ha of this land is located within Invest NI ownership and is already served by an access road. Further lands are available on the southernmost site where an access road is also already in situ (Appendix F: Maps F1 & F2).

LARNE

5.5 In Larne, a total of **81.16 hectares** were zoned to facilitate the industrial needs of the area. To date, approximately 36.73 hectares have been developed leaving some **44.43 hectares** yet to be developed. These are located mainly at Drumahoe where no start has been made to develop these lands, and the initial cost of infrastructure may be a deterrent to prospective investors. In addition to industrial zoned land in Larne, the Larne Area Plan zoned 11.42 hectares for a mixed use development site on Bank Road to include industrial uses, and this site benefits from an extant outline planning permission (Appendix F: Maps F3, F4, F5).

Table 5.1: Approximate Uptake of Zoned Industrial/Employment land in existing Area Plans

*Source: DoE Planning Desktop Survey Jan 2015*Bank Rd has not been included in the Larne Total*

Industrial Area	Total area zoned (hectares)	Area developed (hectares)	Area remaining (hectares)
Galgorm	8	8	0
Woodside Road N&E	63	25.1	37.9
Ballymena Total	71	33.1	**37.9**
Trooperslane	46.13	38.3	**6.83**
Kilroot	68.20	21.38	**46.82**
Belfast Road	31.6	0	**31.6**
Keeburn Ind. Estate	1.121	1.121	**0**
Engineering Works, Woodburn Rd	1.318	1.318 (In mixed use)	**0**
Trailcock Road	3.19	1.47	**1.72**
Carrickfergus Total	151.55	63.59	**86.97**
Larne Harbour	35.25	26.6	**8.65**
Ballyloran	4.2	0	**4.2**
Drumahoe	41.31	9.75	**31.56**
Carnlough	0.4	0.38	**0.02**
*Bank Road**	*11.42 (mixed use zoning)*	*11.42*	*Extant Approval on site not yet constructed*
Larne Total	81.16	36.73	**44.43**
MID & EAST ANTRIM TOTAL	**303.71**	**133.42**	**169.3**

5.6 At Larne Harbour, whilst 8.65 hectares remain undeveloped there is an additional 2.76 hectares approximately, between Coastguard Road & Olderfleet Road that remains zoned for industry but remains in largely residential use and as a surface car park.

5.7 In Carnlough, 0.02 hectares remains undeveloped in the zoned small-scale industrial/business site.

CARRICKFERGUS

5.8 Within Carrickfergus there are zonings for major areas of existing employment/industry. Of these, the three largest zonings are at Belfast Road, Kilroot Industrial Park and Trooperslane Industrial Estate (Appendix F: Maps F6, F7 & F11). At Kilroot, there are **68.20 hectares** of land zoned, and of this, **46.82 hectares** are undeveloped. At the Trooperslane site there is **46.13 hectares** zoned, and of this **6.8 hectares** remains undeveloped. The zoning at Belfast Road which has a number of disused industrial buildings associated with the old Courtualds factory equates to **31.6 hectares** and all of this land remains undeveloped.

5.9 There are three other smaller zonings at Keeburn Industrial Estate, Woodburn Road and Trailcock Road (Appendix F: F8, F9 & F10). The first two of these sites have no undeveloped land remaining. At Trailcock Road, there is 3.19 hectares of land zoned and of this, 1.72 hectares remains undeveloped.

MID & EAST ANTRIM DISTRICT

5.10 From this initial assessment of the existing zoned industrial land in Ballymena, Carrickfergus and Larne Districts it has been calculated that approximately **169.3 hectares** remain undeveloped.

INVEST NI LANDS

5.11 Invest NI has land at Woodside Road - Ballymena, Trooperslane - Carrickfergus and at Millbrook and Bay Road, Larne. Of the 32.59 hectares of their landholding at Woodside Road, approximately 12 hectares remain to be sold or allocated to client companies as of March 2014. At Trooperslane, there is approximately 7 hectares available from their landholding of 43.73 hectares. In Larne, at Millbrook, there is 1.54 hectares remaining from their landholding of 13.91 hectares and there is no land available at their site at Bay Road.

OVERALL CONCLUSIONS & KEY FINDINGS

The purpose of this paper has been to provide baseline information on the employment/industrial needs of the new Council area to assist in informing the Community Plan. From the research, it is clear that within Mid & East Antrim there has been a slow uptake rate of employment/industrial lands. Given that job market recovery has been slow in Northern Ireland, job creation for the new Plan will be challenging and with the cuts in the public sector recently announced, local economies may need to focus on growth sectors such as professional services, information and communications. This will also require people who are highly skilled.

A summary of the key findings are as follows:

(i) Mid & East Antrim has a strong service base and future jobs growth is expected to be in sectors such as information and communication and the professional and technical services. Any plan should try to facilitate growth in this sector. In selecting land for development, it is important to provide sites with quality environments to attract businesses.

(ii) The focus of zoning for employment land should be in the hubs which will take the largest share. Land should also be allocated in the local towns having regard to their population and hinterland.

(iii) The Plan should also be innovative in its approach to zonings, recognising the opportunities which the ongoing road improvements to the A8 will present for Larne and in Carrickfergus in relation to the A2 Shore Road.

(iv) The Plan can help tackle disadvantage and facilitate job creation by providing a range of suitable sites for economic development including opportunities for regeneration and mixed use developments.

(v) It must be recognised that a development plan's economic zonings will not cater for all future economic growth. Within Mid & East Antrim there is a vibrant rural entrepreneurial spirit within the villages and open countryside. It is important that the Plan provides policy which can facilitate sustainable rural businesses.

(vi) Where there is a skills gap, there may be a need to provide additional training as well as the provision of community and other public facilities. Where such a need is required, it should be identified through the Community Plan. If there are firm proposals, the Plan should provide a flexible policy to facilitate them by reserving land through zonings.

Finally, it is recommended that the views of members are sought in order to inform how officers should proceed on the following:
1. Setting targets and outcomes for job creation;
2. The amount of economic development land which the Plan should facilitate;
3. How such land should be allocated across the settlements.

An addendum to this paper will follow prior to the workshop on this topic and this will provide methodology on how to calculate how many jobs are required to cater for a growing population, and how these jobs can be accommodated across employment sectors, and if necessary translated into a need for additional employment land up to 2030.