DERRY CITY AND STRABANE DISTRICT COUNCIL

LOCAL DEVELOPMENT PLAN (LDP) 2032

EVIDENCE BASE EVB 6

Economic Development

(Updated May 2017)

This Document is one in a series, which builds up to form the ‘evidence base’ that informs the preparation of the Local Development Plan (LDP).

It comprises initial Workshop Paper(s) on this Planning topic that were presented to Council Members during 2016 / 2017, which have been subject to Member discussion and input, before further discussion at the Planning Committee (LDP) and in turn feeding into the LDP Preferred Options Paper (POP) and then the Plan Strategy (PS) and eventually the Local Policies Plan (LPP) which together forms the LDP.

The afore-mentioned evidence base will be continually updated, to additionally include the latest information, input from public engagement, statutory consultees, stakeholder groups, Sustainability Appraisal and from other Departments within the Council, including Community Planning.

The Evidence Base is published as a ‘supporting document’ in accordance with Article 10(a) and 15(a) of the Planning (LDP) Regulations (NI) 2015.

CONTENTS

APPENDICES

Paper 1:	Economic Development – Legislation, Policy and Local Context
Purpose of Paper:	The purpose of this report is to advise Members on the following: an overview of the legislation / policy and how economic development should be considered in the LDP; a summary of employment and economic development in the District; then to consider how these can affect our LDP designations, zonings, proposals and policies. Members' input is invited.
Content:	The paper provides information on:- (i) The legislative hierarchy in place in relation to economic development; (ii) Employment and Economic Development within our District; and (iii) The scope of the Local Development Plan (LDP) to protect existing employment land and provide additional land, along with appropriate policies to guide development.
Conclusion:	Councillors should note the contents of this paper in relation to our economic development and provide input / feedback on how this aspect should contribute to our LDP.

1.0 Introduction to Paper

1.1 This Paper is one in a series, building up the evidence base that will inform the preparation of the Local Development Plan (LDP). The LDP will have a new approach to protecting our environment and promoting appropriate development in line with the Community Plan, moving away from the reactive planning of the past, towards a more proactive approach.

1.2 The discussion and input from Council Members at Workshop 5 feed into a forthcoming ‘options’ Paper on these matters to the Planning Committee (LDP) - for decision, which will in turn feed into the LDP Preferred Options Paper (POP) which is due out in March 2017.

1.3 This Paper relates to our economic development which is the Executive’s top strategic priority in its Programme for Government (PfG). The Executive considers it essential to create a vibrant economy, to produce employment and wealth for the future, if a cohesive, inclusive and just society is to be achieved.

1.4 Therefore, this Paper mainly provides Members with an overview of the planning legislation and policy covering economic development, summarises our employment and economic development and considers how these issues can be addressed into the new LDP for our District, including designations, zonings, proposals and policies to maintain and further grow our economy.

1.5 The paper concerns the land use needs and policies in relation to larger scale Economic Development uses in accordance with definitions in PPS4: Economic Development and the Use Classes Order. Whilst previous plans will have referred to “industrial land”, the new definitions reflect that current/future needs are increasingly for light industry, business, distribution, technology, large back-offices, call centres etc. The Paper does not generally relate to retailing or town centre uses. Retailing and Town Centres are covered in their respective papers to be presented at this Workshop.

1.6 The purpose of the planning system is to secure the orderly and consistent development of land with the objective of furthering sustainable development and improving well-being. Economic land will not be considered in isolation, we need to ensure we integrate Economic Development along with Transport and Housing.

1.7 In essence, the statutory framework seeks to ensure that when preparing its Local Development Plan (LDP), the Council will take full account of the implications of proposed land use zonings, locations for development and settlement limits on the economy and employment within or adjoining the plan area.

2.0 Legislation

a) National Legislation

2.1 Relevant Legislation is provided by The Planning Act (Northern Ireland) 2011, The Planning (Local Development Plan) Regulations (Northern Ireland) 2015 and The Planning (Use Classes) Order 2015.

2.2 **The Planning Act (Northern Ireland) 2011 -** Under Part 2, Paragraph 21 Council must make an annual report to the Department. The annual report must contain such information as is prescribed as to the extent to which the objectives set out in the LDP are being achieved. This may include economic development information.

2.3 **The Planning (Local Development Plan) Regulations (Northern Ireland) 2015:** Under Part 6, 'Annual Monitoring Report and review of a Local Development Plan', Paragraph 25, Council must prepare an Annual Monitoring Report for submission to the DfI. The annual monitoring report must specify housing and economic development land supply, as well as such other issues as appear to the council to be relevant to the implementation of the LDP. Under Part 6, Paragraph 26, Council must carry out a review of its LDP every 5 years.

2.4 **The Planning (Use Classes) Order (NI) 2015** – Part B deals specifically with Industrial and Business Uses, and this is broken into specific classes with B2 relating to Light Industrial, B3 General Industrial and B4 Storage and Distribution.

b) Regional Policy

2.5 Regional Planning Policy is set out in:

2.6 **Regional Development Strategy (RDS) 2035:** The RDS sets out the spatial strategy of the Executive, presenting Regional Guidance (RG) under 3 sustainable development themes – economy, society and environment, and has eight overarching Aims. The following aims are particularly relevant to the Economy:

- Support strong, sustainable growth for the benefit of all parts of Northern Ireland
- Strengthen Belfast as the regional economic driver and Londonderry as the principal city of the North West
- Support our towns, villages and rural communities to maximise their potential
- Improve connectivity to enhance the movement of people, goods, energy and information between places

2.7 Chapter 3 of the RDS gives Strategic Guidance relating to long term policy direction and sets out both Regional Guidance (RG) and Spatial Framework

Guidance (SFG). A number of these RGs are relevant to the Economy within the Derry / Strabane District, including RG1 which relates to the adequate supply of land to ensure that Northern Ireland can accommodate growth in jobs and businesses, and specifies that economic development opportunities across the Region should be focused on the BMUA, Londonderry and Hubs as the main centres for employment and services.

2.8 The Regional Guidance, through RG1 wants to ensure that there is an adequate supply of land to facilitate sustainable economic growth. This land should be accessible and located to make the best use of available services, for example water and sewerage infrastructure, whilst avoiding, where possible, areas at risk of flooding from rivers, the sea or surface water run-off.

2.9 The quality and viability of sites zoned for economic development uses in Area Plans should be assessed against an Employment Land Evaluation Framework which will enable planning authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans. This means protecting zoned land in development plans and, in order to capitalise on the development opportunity provided by a concentration of people, goods, available infrastructure and business, promoting economic development opportunities in the Hubs (SFG11). It also recognises the importance of sustaining rural communities by facilitating rural industries, business and enterprises in appropriate locations. This means not only businesses connected to farming, forestry and fishing but other industries such as tourism and renewable energy which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a settlement or rural landscape.

2.10 The RDS also emphasizes the importance of telecommunication infrastructure to growing our economy in RG3 and recognises that the telecommunications network within Northern Ireland is world class but is it vital that we keep up-to-date with the latest technology. The RDS defines the North West as being the Council Districts of Derry and Strabane, extending into Donegal. It identifies Derry as the Principal City within the North West and Strabane as a Main Hub. The specific section within the RDS relating to the North West has a number of Spatial Framework Guidance relating to the economic development of the region:

- SFG6: Develop a strong North West.
- SFG7: Strengthen the role of Londonderry as the principal city for the North West.
- SFG8: Manage the movement of people and goods within the North West. Efficient transport infrastructure is important in promoting a successful economy, by:
    - Enhance transport linkages across the region, to and from air and sea ports and the distribution of traffic from and between transport corridors.
    - Manage travel demand within the North West.
    - Improve the public transport service.
    - Integrate Land Use and Transportation.
    - Manage the efficient movement of freight.

- Provide better accessibility to the central area of the city.

2.11 **Planning Policy Statement 4 (PPS 4), Planning and Economic Development (November 2010):** Sets out the regional planning policies for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. Economic development uses comprise industrial, business and storage and distribution uses, as currently defined in Part B 'Industrial and Business Uses' of the Planning (Use Classes) Order (Northern Ireland) 2015.

2.12 **Planning Policy Statement 21 (PPS 21)** Sustainable Development in the Countryside sets out planning policies for development in the countryside including farm diversification and other economic activity in accordance with PPS 4.

2.13 **Strategic Planning Policy Statement (SPPS) (September 2015):** Under the provisions of the SPPS, during the preparation of LDP an ample supply of suitable land available to meet economic development needs within the plan area should be provided. The LDP should offer a range and choice of sites in terms of size and location to promote flexibility and 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, connectivity with the transportation system (particularly public transport), the availability of adequate infrastructure, the specialised needs of specific economic activities, potential environmental impacts and compatibility with nearby uses including the operational requirements of existing or approved economic development.

2.14 The LDP will not normally zone land for economic development purposes within villages or small settlements, as this could inhibit flexibility of development e.g. for housing.

2.15 The SPPS also recognises the need to support and sustain vibrant rural communities consistent with the RDS and to strike a balance between facilitating new development and protecting the environment from inappropriate development. The policy approach is cluster, consolidate, and group new development with existing established buildings and the reuse of previously used land and buildings. Local policies and proposal may be brought forward in the LDP which address development such as farm diversification, agriculture and forestry development, tourism / holiday accommodation and re-use / conversion of existing buildings. Our extensive rural community and addressing their economic needs via appropriate and flexible planning policy will be a specific priority for the LDP.

2.16 Tourism also makes an important contribution to the NI Economy in terms of the revenues it generates and the employment opportunities it provides. The aim of the SPPS in relation to tourism development is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environments. Tourism will be examined at a later date. Town centres also provide employment and new strategic policy for town centres and retailing is contained within the SPPS. The role of the City and Town Centres, and Retailing will be explored in the subsequent papers.

2.17 **Marine Consideration:** In recent years, legislation has been introduced to ensure that for the first time marine activities and resources within our marine waters are planned and managed in a coherent manner. Therefore, any economic development proposals or polices that could affect the coastal areas or settlements should be an LDP consideration. The following three interlocking pieces of legislation have been introduced to help deliver the UK vision of having "clean, healthy, safe, productive and biologically diverse oceans and seas":

- UK Marine and Coastal Access Act (MCAA) 2009
- UK Marine Strategy Regulations 2010
- The Marine Act (Northern Ireland) 2013

2.18 In addition, the UK Marine Policy Statement (MPS) 2011 is the framework for preparing Marine Plans and taking decisions affecting the marine environment. Of particular relevance, is the legislative requirement that all public authorities taking authorisation or enforcement decisions that affect or might affect the UK marine area to do so in accordance with the MPS unless relevant considerations indicate otherwise. Accordingly, in future, Council will not only have those legal implications in relation to terrestrial planning but also for marine matters as well.

2.19 **Derry Area Plan (DAP) 2011**: An objective of the plan promotes the sustainable development of the Derry City Council area by making provision for economic development while protecting its natural assets and man-made heritage for the enjoyment of future generations. Accordingly existing industrial land was identified and new sites zoned in Derry city and nearby settlements.

2.20 **Strabane Area Plan (SAP) 2001**: Contains the policies and proposals relating to industry within the former Strabane District, including the allocation of sufficient land to meet the needs for industry within Strabane and the local towns and to encourage a high standard of environmental quality within industrial areas.

2.21 The new duty of **Community Planning** introduced in April 2015 requires the Council to lead the process of creating a long term vision for the social, environmental and economic well-being of the area and its citizens. The Local Government Bill introduces a statutory link between the resultant Community Plan and the Council's Local Development Plan (LDP), in that the LDP must take account of the Community Plan in its preparation. Therefore it provides the key context at the local Council level for the preparation of the LDP.

2.22 The new style of LDP provides a unique opportunity for the Council to genuinely shape the district for local communities and will enable them to adopt a joined up approach, incorporating linkages to other functions such as regeneration, local economic development and community planning. The

Local Government Act introduces a statutory link between the Community Plan (CP) and the LDP, in that the preparation of the LDP must 'take account of' the CP – which provides the higher-level strategic aspirations for economic development in the District. It is intended that the LDP will be the spatial reflection of the CP and that the two should work in tandem towards the same vision for the Council area and our communities and set the long term social, economic and environmental objectives for the District.

2.23 **Draft Integrated Economic Development Strategy (IEDS).** The Council is currently leading development of an Integrated Economic Development Strategy in conjunction with Invest NI. The IEDS sets out the priority growth sectors for the DCSDC area, key enablers to realise this growth and the strategic priorities for the entire Council area. This strategy will be finalised in conjunction with the strategic Community Planning process and will form the Economic Pillar of the strategic Community Plan and the LDP will be act as a spatial reflection of this.

3.0 Economic Profile of the Derry City and Strabane District

3.1 This section provides an overview of the employment and economic base of the District within the context of the Northern Ireland economy and examines employment sectors, unemployment and economic activity rates.

3.2 Through objectives set out in Enabling Success – A Strategic Framework, the NI Executive (April 2015) have identified a range of goals and objectives to help individuals into the workforce and tackle the high unemployment levels within the province.

3.3 For many decades, Northern Ireland has experienced a consistently high rate of economic inactivity in comparison to the United Kingdom. As outlined in the Oxford Economics: Northern Ireland Economy in Transition (2014), following several difficult years since the onset of recession in 2008, the NI economy is finally starting to recover. Employment is now rising, unemployment is falling, output is growing, house prices are increasing and business and consumer confidence are at their highest levels since before the recession.

3.4 However the document outlines that the recovery is not being enjoyed by all households and businesses. Nor is it as strong, or forecast by Oxford Economics to be sustained for as long. Economic conditions remain tough for many households; wage growth has been muted, many new jobs are part-time and offer fewer hours than individuals would ideally like to work, living costs are at record highs and in-work poverty has soared. Economic conditions also remain tough for many businesses.

3.5 Furthermore Oxford Economics' economic outlook predicts much weaker job creation to 2020 than in the past, despite the strong jobs growth observed in and forecast for 2013 and 2014.

Current Economic and Employment Trends in the Derry City and Strabane District

3.6 Consideration needs to be given to trends in employment when considering local industry and mixed business policies. The key indicators being economic activity and unemployment rates together with levels of employment by sector.

3.7 There are three general employment classifications, namely primary, secondary and tertiary. The primary sector includes mining, agriculture and fishing, i.e. natural resources. The secondary sector relates to manufacturing and processing, whereas the tertiary sector includes service provision such as office work, retailing, healthcare provision and communications.

3.8 Since 1961, the general trend in Northern Ireland has been a reduction in the numbers employed in the primary and secondary sectors although this has more than been absorbed by growth in the tertiary or service sector.

3.9 The employment sector patterns of the former districts of Derry and Strabane, generally reflect the Northern Ireland trend of a fall in both the primary and secondary sectors and a significant increase in the tertiary sector as illustrated in Table 1 (below) between 2011 and 2015.

Table 1: Businesses operating in DCSDC and NI by broad industry group, 2016

Region	DCSDC		NI
	Number	%	%
Agriculture, Forestry and Fishing	1,205	24.95%	25.24%
Production	290	6.00%	6.58%
Construction	710	14.70%	13.31%
Motor Trades	170	3.52%	3.47%
Wholesale	200	4.14%	4.69%
Retail	460	9.52%	8.66%
Transport and Storage (Inc. Postal)	145	3.00%	3.15%
Accommodation and Food Services	285	5.90%	5.30%
Information and Communication	95	1.97%	2.48%
Finance and Insurance	65	1.35%	1.62%
Property	140	2.90%	2.88%
Professional, Scientific and Technical	310	6.42%	7.80%
Business Administration and Support Services	145	3.00%	3.43%
Public Administration and Defence	*	*	0.07%
Education	45	0.93%	0.92%
Health	240	4.97%	4.11%
Arts, Entertainment, Recreation and Other Services	325	6.73%	6.28%
Total	4,830	100%	100%

Source: NISRA, Inter-Departmental Business Register

3.10 The largest industry group in DCSDC and NI is Agriculture, Forestry and Fishing, accounting for over one quarter (24.9% and 25.2% respectively). Outside of Agriculture, the largest industry group in DCSDC is Construction (14.7%) followed by retail (9.5%). DCSDC has a higher proportion of its industry in these three groups compared to NI. However, it then has to a lower dependence on those industries allied to professional services. (IT, Professional /Scientific).

3.11 The District's two largest employment sectors are in Human Health and Social Work Activities with 11, 600 employee jobs (22% of the total), followed by Wholesale and Retail Trade 9,280 (17% of total jobs). A comprehensive breakdown of jobs by sector is provided in the following Table 2.

Table 2: Number of employee jobs by industry sector, 2011, 2013 and 2015

Industry	2011	2013	2015
Agriculture, Forestry And Fishing	*	60	50
Mining and Quarrying	*	*	70
Manufacturing	4,540	4,620	5,090
Electricity, Gas, Steam and Air Conditioning	30	*	100
Water Supply; Sewerage, Waste Management	410	410	420
Construction	2,200	1,900	2,240
Wholesale / Retail Trade[1]	9,620	9,290	9,280
Transportation and Storage	1,290	1,240	1,380
Accommodation and Food Service	2,940	3,080	3,410
Information and Communication	*	1,720	1,870
Financial and Insurance	1,240	1,200	1,150
Real Estate	730	480	500
Professional, Scientific and Technical	1,120	1,180	1,240
Administrative and Support Service	3,040	3,640	3,260
Public Administration and Defence	3,900	3,910	3,790
Education	*	5,640	6,040
Human Health and Social Work	9,800	9,890	11,600
Arts, Entertainment and Recreation	1,020	1,080	1,260
Other Service	800	830	880
Total	50,470	50,250	53,630

Source: NISRA, Census of Employment, Business Registration Employment Survey

3.12 Derry's traditional industrial base has been in the textile industry, especially the shirt factories. However, the last shirt factory, Glenden, closed its doors in June 2008. Graham Hunter Apparel is the last remaining textile factory in the city, a former shirt factory that has diversified into uniform manufacturing. Current important employers in this sector include Du Pont / Invista, Seagate and Perfecseal.

3.13 While the textile industry has also long been the backbone of Strabane's manufacturing base, this too has been experienced decline since the 1980's and seen the closure of Adria and Herdmans in Sion Mills, reflecting Strabane's vulnerability to the global down-turn in manufacturing and in particular the textile industry. Other important employers in manufacturing in the Strabane District include Leckpatrick (Artigarvan), McColgan Quality Foods, Boran-Mopack (packaging products) and O'Neills Sports Wear. Recent investment in the Allstate call centre in Strabane, emphasises the need to diversify from the traditional manufacturing base.

3.14 In the tertiary sector, the main employment areas for the former Derry District are within the wholesale and retail trade, public administration, education and health and social work. This primarily reflects Derry's importance as a major administrative and service centre and provider of educational and health services. A range of government departments, educational establishments and health facilities, including the Altnagelvin Hospital, the Ulster University at Magee Campus and North West Regional College have long been major employment providers for the city and surrounding area.

3.15 In contrast, whilst Strabane's share in the tertiary sector has clearly grown over the years, the proportion remains less than that of Derry. While there has been significant investment in new retail developments around the ASDA store in Strabane town centre, there has been less provision of jobs in central government departments, healthcare and education.

3.16 Forecasts for the manufacturing sector provided by DETI, suggest a continued decline in manufacturing employment levels both in Northern Ireland and in the UK. Significant contraction is expected to continue in textiles and, on a smaller scale, in heavy industry, namely metals and machinery. However, it is important to recognise that the role of manufacturing is changing with, amongst others, the importance of innovation and design, the development of products with niche markets, the importance of knowledge-based products and processes and increased output with less employment. Key sectors or markets with the potential for future growth include:

- bio-technology products including pharmaceuticals;
- environmentally sustainable products including recycling activities and those linked to renewable energy; and
- health-related products, including food products with a positive health content.

3.17 The four key growth sectors identified in the Derry and Strabane Draft Integrated Economic Development Strategy for our District are:

- Advanced Manufacturing/Engineering
- Digital/Creative Industries
- Life and Health Sciences
- Tourism and Culture

3.18 The Derry and Strabane Draft Economic Development Strategy also identified the following sectors as playing an important role in supporting Derry and Strabane's economic development, with the potential to enable incremental growth:

- Agri-Food
- Business Services

- Financial Services
- Renewables
- Retail
- Social Enterprise
- Textiles (manufacturing)

Business Profile

3.19 In considering the economic base of the District, there were 4,830 VAT or PAYE Registered Businesses within the Derry City and Strabane District. In 2014, Invest Northern Ireland (INI) estimated that of the registered 4,525 businesses, micro-businesses accounted for 4,025 (less than 9 employees) and 430 were classified as small (less than 50 employees), 55 as medium (50-249 employees) and 10 as being large (250 plus employees);

Table 3: Registered businesses operating in DCSDC by employment size band, 2016

Size band	DCSDC		NI
	Number	%	%
0	10	0.2%	0.4%
1 - 4	3,700	76.6%	76.2%
5 - 9	570	11.8%	11.9%
10 - 19	315	6.5%	6.0%
20 - 49	145	3.0%	3.3%
50 - 99	45	0.9%	1.1%
100 - 249	25	0.5%	0.7%
250 - 499	10	0.2%	0.2%
500+	10	0.2%	0.2%
Total	4,830	100%	100.0%

Source: NISRA, Inter-Departmental Business Register

3.20 Both Derry City and Strabane District Council area and NI have similar proportions of their business within those size bands employing less than 10 people (88.4% and 88.1% respectively).

Employment Profile

3.21 The percentage of economically active persons in Derry has remained fairly constant over the four decades ranging between 59% and 61% but has always lagged behind the Northern Ireland figure with Strabane being significantly worse than the rest of NI.

3.22 The 2015 Labour Force Survey (Table 4) estimated that there were 60,000 people in employment in 2015 within DCSDC. Of these, 42,000 were in full-time employment and 17,000 were in part-time employment. This led to an employment rate, for those aged 16 and over, of 52.1% with the employment rate for those of working age (16-24) standing at 59.6%).

Table 4: DCSDC employment totals and rates, 2009 - 2015

Year	In employment (16+)			Employment rate	
	Full-time	Part-time	Total	16+	16-64
2009	40,000	15,000	56,000	49.3%	57.4%
2010	41,000	14,000	55,000	47.7%	55.0%
2011	42,000	15,000	58,000	51.6%	60.2%
2012	41,000	14,000	55,000	50.6%	61.1%
2013	41,000	14,000	56,000	49.0%	55.7%
2014	43,000	14,000	58,000	48.7%	56.5%
2015	42,000	17,000	60,000	52.1%	59.6%

Source: NISRA, Labour Force Survey

3.23 In 2015, there were 53,630 employee jobs in DCSDC (Table 5). Of these, 24,130 were jobs carried out by males and 29,500 were jobs held by females. Males have a higher tendency to work in full-time positions. Of the 24,130 jobs held by males, 18,910 jobs (78.4%) were full-time and 5,220 were part-time. The split in job status for females was more even with 15,390 jobs (52.2%) being held by a female in a full-time position and 14,110 (47.8%) being held by a female in a part-time position.

Table 5: Number of DCSDC employee jobs by gender and job status, 2011 - 2015

Year	Employee jobs						
	Male full-time	Male part-time	Male	Female full-time	Female part-time	Female	Total
2011	17,640	5,220	22,850	14,220	13,390	27,620	50,470
2012	17,740	5,160	22,900	14,930	13,250	28,180	51,080
2013	17,730	5,170	22,900	14,620	12,730	27,350	50,250
2014	17,670	5,250	22,920	14,720	14,970	29,690	52,610
2015	18,910	5,220	24,130	15,390	14,110	29,500	53,630

Source: NISRA, Census of Employment, Business Registration Employment Survey

3.24 In Northern Ireland, a total of 402,000 women were economically active in April-June 2015, an increase of 12,000 since the previous year. The female working age economic activity rates in NI of 66.8% was 5.6 percentage points lower than GB (72.4%). Based on the 53, 630 employee jobs in the District, 24,130 were carried out by males whereas 29,500 were held by females. Males have a higher tendency to work in full-time positions. Of the 24, 130 jobs held by males, 18,910 jobs (78.4%) were full-time and 5,220 were part-time. The split in job status for females was more even with 15, 390 jobs (52.2%) being held by a female in a full-time position and 14,110 (47.8%) being held by a female in a part-time position.

Earnings Profile

3.25 In considering earnings, the median average household income was £18,112 compared to £21,345 for Northern Ireland. Based on NISRAS Annual Survey of Hours and Earnings (Table 6) males generally earned more than females in both full-time and part-time jobs.

Table 6: Gross median weekly pay by status, DCSDC and NI, 2016

Status	Working in DCSDC (£)	Resident in DCSDC (£)	NI (£)
All	351.0	324.0	393.0
Male	377.0	361.9	453.3
Female	313.3	283.5	322.6
Full-time	453.2	421.9	495.2
Part-time	169.0	152.2	171.7
Male full-time	420.9	414.6	505.9
Male part-time	159.9	153.5	156.4
Female full-time	495.0	434.2	475.1
Female part-time	171.7	150.0	178.2

Source: NISRA, Annual Survey of Hours and Earnings

Economic Inactivity Profile

3.26 Estimates from the 2015 Labour Force Survey (LFS) indicate that 41.4% (48,000 people) of all those aged 16 and over, in the Council area were economically inactive, i.e. people who are neither in employment nor unemployed as per the International Labour Organisation (ILO) measure. This was higher than the rate for NI (39.4%). The 16-64 rate of inactivity was somewhat lower as it does not include the majority of those who are retired. This rate of inactivity stood at 32.9% (32,000 people) within DCSDC compared with an NI average of 27.1%.

***Table* 7: Economic Inactivity, DCSDC and NI, 2015**

Age group	DCSDC		NI	
	Number	*%*	*Number*	*%*
16+	*48,000*	*41.4%*	*570,000*	*39.4%*
16-64	*32,000*	*32.9%*	*317,000*	*27.1%*

Source: NISRA, Labour Force Survey

Unemployment Profile

3.27 The claimant count is a measure of unemployment that utilises administrative data derived from Jobs and Benefits Offices systems, which record the number of people claiming unemployment-related benefits (Table 8). In February 2017, the unadjusted claimant count rate for the District was 5.3% compared with a rate of 2.8% for NI. Within this context, this equated to a total of 5,092 claimants, of which 3,477 were male and 1,615 were female. The DCSDC claimant count rate for males was 7.4% (3.9% NI) and for females it stood at 3.3% (1.7% NI).

Table 8: Claimant Count (unadjusted), DCSDC and NI, February 2017

	Number of claimants			% of those aged 16-64		
	Males	Females	Total	Males	Females	Total
DCSDC	3,477	1,615	5,092	7.4%	3.3%	5.3%
NI	22,691	9,932	32,623	3.9%	1.7%	2.8%

Source: NISRA, Claimant Count

3.28 However, the District and NI unadjusted claimant count rates have reported a downward trend since 2013. Before the onset of the 2007 recession, the unadjusted claimant count in DCSDC stood at 3.8% (2.0% in NI). The unadjusted claimant count in DCSDC peaked at 8.7% compared with a peak of 5.7% in NI.

Table 9: Claimant Count by age and duration, DCSDC and NI, January 2017

Region	Total	12mths+		24 and under			
						12 mths+	
		Number	%	Number	%	Number	%
DCSDC	5,070	2,555	50%	1,265	25%	405	32%
NI	32,220	10,925	34%	7,450	23%	1,570	21%

Source: NISRA, Claimant Count

1. Data based on rounded numbers
2. Does not include clerical returns

Deprivation Profile

3.29 There are high levels of deprivation across the District. The NI 2010 Multiple Deprivation Measures report by NISRA indicates that Derry and Strabane has 19 of the most deprived SOAs in NI. Table 10 and Map 1 in Appendix 1 shows deprivation throughout Northern Ireland and clearly shows the high levels of deprivation in our area.

3.30 As of 2014, Northern Ireland had a higher proportion of long term unemployed (33%), compared to 30.5% for the UK as a whole. The equivalent figure for our District was 39.3% which is considerably higher than both. New employment opportunities are better aligned with well-educated and recently trained individuals and those that are unemployed for shorter periods (Oxford Economics). The absence of skills and experience that comes with being in long term unemployment makes it more difficult to find employment and presents a challenge for the future economy.

Skills Profile

3.31 It is anticipated that future economic growth will transition towards more exportable service sectors and if Derry-Strabane is to participate in this direction, 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.

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

3.33 Since 2009 to 2014, NISRA has recorded a decrease in those of working age with no qualifications from 30.4% to 21.8%, which is a significant reduction. Those of working age with NVQ level 4 and above has stayed consistently at around 22%, while those with qualifications of NVQ Level 4 and below has increased from 47% to 56.1 over this time. A more highly educated workforce with skills to match those emerging employment sectors with export potential is needed.

4.0 Assessment of the Uptake of Industrial Land

Uptake of Lands for Industrial Use within the Area Plan Zonings

4.1 The Derry Area Plan 2011 zoned land for industrial purposes in the principal city of the North West, Derry, in the villages of Culmore and Newbuildings and at 2 major locations, Campsey and Maydown. The Strabane Area Plan 2001 zoned land for industrial purposes in the hub of Strabane and in the local towns of Castlederg, Newtownstewart and Sion Mills. Surveys carried out by DOE Planning in 2011 (Strabane) and 2013 (Derry) have identified remaining capacity within the current industrial zonings (see Appendix 2 Table 1 for details).

4.2 In Derry District, 152.5 hectares of the 209.1 hectares (73%) zoned remain undeveloped, of which approximately 3 hectares (2013 survey) have planning commitments.

4.3 Uptake of the zonings has varied between sites in Derry District, with no significant development at Culmore. At the time of adoption of the Plan, this site accommodated the meat factory on a small part only (2.34 ha), and this remains the only occupier. Around 82% (65ha) of the zoning at Maydown remains undeveloped, while around 64% (13ha) of the zoning at Campsey remains undeveloped. 7ha of the zoning has been developed for Perfecseal. There is also existing industry at both Maydown and Campsey as shown in the DAP 2011. In Newbuildings, around 42% (6ha) of the zoning remains undeveloped.

4.4 In contrast, of the 15 hectares zoned in Strabane town, less than 4 hectares remain undeveloped with only 1.3 hectares remaining at Dublin Road and 2.65 hectares at Orchard Road. Around 5 hectares of zoned industrial land remains undeveloped in the local towns of Strabane District.

4.5 Most of the zonings in Castlederg and Newtownstewart have been taken up. In Sion Mills, industrial land was originally zoned to allow for possible expansion of the Mill, but this has now closed.

4.6 Apart from Maydown and Newbuildings, the majority of development on zoned industrial land has been for light and general industrial uses, storage and distribution. Purpose-built office and business accommodation has also been developed at Skeoge. This is in keeping with PPS4, which in the main promotes zonings to be for “economic development” needs rather than the previous “industrial zonings”. However, some non-conforming uses have occurred, with retail uses being common in Buncrana Road and Newbuildings. It should also be noted that whilst some of the employment land is “developed”, there are some vacant units e.g. Ulster Science and Technology Park in Derry or in other estates where the buildings are quite old and under-utilised.

4.7 Invest NI is a major public sector landowner within the Council area. Its holdings in Campsey, Skeoge, Maydown and Springtown total approximately 168 ha, of which nearly 43 ha remains available for development at Campsey, Skeoge and Maydown by qualifying businesses with an approved business case.

4.8 In Strabane, Invest NI's main landholding was at Orchard Road where some 9 hectares of their original holding have been sold to client companies, the local enterprise agency and Roads Service. Of the remaining 1.6 hectares, only 0.93 hectares are undeveloped. In March 2013, Invest NI announced the completion of the first phase of the new business park at Melmount Road in Strabane, with a total of 22 acres (c.8.9ha) of serviced land for potential investors. Whilst a number of Invest NI firms have declared an interest in acquiring sites, the business park remains empty, with no companies present on site. However a recent planning application has been received and is currently under consideration.

Availability of Land in Established Industrial Estates / Business Parks

4.9 The Derry Area Plan identified new industrial development zonings and also identified the main established industrial estates, where the turnover of businesses and associated land also results in development opportunities. The Strabane Area Plan only identified new industrial development opportunities. Surveys carried out by DOE Planning in Derry in 2013 identified approximately 180 hectares of land remaining undeveloped, across 23 existing industrial sites, the majority of which weren't identified in the DAP 2011. The North West Regional Science Park at Fort George was opened after the survey was carried out and therefore is not included. Surveys carried out by DOE Planning in Strabane in 2011 identified that there were 2.2 hectares of vacant land in Ballycolman and Dublin Road Industrial Estates. Significantly there are also approximately 8.9 hectares of undeveloped land at the new Invest NI Strabane Business Park (Table 2 Appendix 2).

5.0 The Need for Future Employment Land

5.1 As part of the preparation of the LDP, an estimate of the amount and the location of land is required to ensure an ample supply of suitable land is available to meet economic development needs. This should take into account various factors including past trends in take-up of land for economic development purposes.

5.2 In order to estimate the amount of land required, three methodologies are used as follows:-

- Model 1 - based on the amount of land developed to date;
- Model 2 - based on population growth and unemployment; and
- Model 3 - based on applying the average number of jobs created between 2001 and 2013.

(a) Model 1

5.3 An indication of past demand is given by the take-up of identified industrial land (Table 1 Appendix 2). From 2000-2013 the average take up of land zoned in the Derry Area Plan 2011 was 4.4 hectares per annum, suggesting 66 hectares will be needed from 2015-2030. There are 152.5ha remaining. This equates to a 34 year land supply. In contrast, from the Strabane Area Plan, the average uptake equates to 0.73 hectares per annum over the 20-year period 1991 to 2011, suggesting that some 11 hectares are required up to 2030. There are 8.9ha remaining. This equates to a 12 year land supply. Theoretically, there is sufficient land zoned in the Derry Area Plan to meet demand post 2030 based on past rates of uptake, though additional land will be required in Strabane.

Model 1 Table: Land Required to 2030

	Land Remaining	Land Required
Derry	152.5ha	None
Strabane	8.9ha	2.22ha

5.4 However, care needs to be taken when applying such a broad-brush approach in that recognition is not given to the disparities between take up on different land zonings.

5.5 The problem with this method of assessment is that it does not take account of land developed for employment/industry on unzoned land and does not allow for changes in take up rates as a result of changing economic conditions and technology.

5.6 Outside of existing industrial estates, development of land in Derry has occurred in recent years on the city side at Rath Mor (Creggan), Ulster Science and

Technology Park, close to the Donegal border at Bridgend and in the Waterside at Glendermott Valley Business Park at Tullyally, and at Newbuildings Business Centre.

5.7 Development of four storey office development for IT and science based business at the North West Regional Science Park has also occurred on the city side at Fort George, the former military base. The developed area of this site is approximately 0.88 hectares. Permission was granted in 2009 for a Telecommunications building to serve the Hibernia communication link from the USA to GB and Ireland (Project Kelvin). A major mixed use development has also been approved for this site in December 2015. In Strabane, industrial units were built on a 0.75 hectare site to the south of Orchard Road Industrial Estate outside the development limits. Given the small site areas involved, it is not considered meaningful to try and assess take up rates on these. It may be concluded that there has been great demand for land for industrial uses outside of the zoned sites in Derry. However, in Strabane, the approval of industrial units outside the development limits, point to a shortage of industrial land in the town.

5.8 In conclusion, an assessment of take up rates can only provide an indication of future land requirements based on past trends, and do not take account of anticipated future population and employment growth over the plan period or changes in the global economy, technology and communications. It is therefore necessary to examine an alternative which offers a more robust approach.

(b) Model 2

5.9 To estimate the number of jobs required, a methodology has been used based on economic activity and unemployment rates and the latest (2008-based) population projections from NISRA. By applying NISRA population projections, it is possible to estimate the number of people who will be economically active in 2030. For the purposes of this exercise, the economic activity rates for each of the previous districts have been added together and averaged to give a figure for the new Council area. Based on Table 9 of Appendix 1, a mean unemployment rate of 6.5% has been assumed.

5.10 Thus the following economic activity rates from the Census 2011 have been used:

Derry = 60.51%

Strabane = 60.20%

Derry-Strabane = 60.35% (rounded to 60%)

5.11 A figure for the working age population has been estimated using the proportion of the Derry-Strabane population aged 16-74 in 2011 i.e. 72.44% (rounded to 72%). This is then applied to the population estimates derived from NISRA. A number in employment can therefore be estimated for 2015 and 2030 by applying the economic activity rate of 60% and an unemployment rate of 6.5%.

5.12 By subtracting the number in employment in 2015 from the number in employment in 2030, the total number of additional jobs required between 2015 and 2030 is 3,052.

5.13 It should be noted that more recent figures have been published regarding population projections, economic activity and unemployment rates. This model will therefore be updated in light of these updated figures, in conjunction with the Council's statisticians and in light of the workshops.

Model 2 Table: Land Required to 2030

	Land Required
Derry & Strabane	61 hectares

(c) Model 3

5.14 With an estimated 2,238 additional jobs created during the period 2001 and 2011(Census of Employment, DETI) which included years when jobs were lost due to the recession. This equates to an average of 224 jobs per annum over the period. If this average figure is applied to the plan period 2015-2030, potentially 3,357 might be created.

5.15 It should be noted that in the interim, since the 2011 Census, the total number of employee jobs in Northern Ireland in September 2013 was 704,017, an increase of 10,934 jobs (1.6 per cent) since September 2011. However of the former 26 District Council Areas, eight recorded a decrease in the number of employee jobs in that period, with the largest percentage decreases in NI was recorded in Strabane (2.3 per cent or 207 jobs.

Model 3 Table: Land Required to 2030

	Land Required
Derry & Strabane	67.14 hectares

The Need for Future Employment Land

5.16 Translating industrial and business employment levels to a land requirement is problematic given the variance of employment densities between uses. Research by Collier CRE showed density ranged from 1 job per 16sqm at Doxford Park, Sunderland to 1 job per 99sqm at Sherwood Business Park, Annersley, Nottinghamshire. Similar disparities have been shown up by a survey of industrial estates carried out by Planning Service in 2005. This established that average employment density at Orchard Road was 1 job per 26.26sqm. These differences can be accounted for by the nature of uses on the industrial estates with traditional general industry and warehousing having lower employment densities compared to high-tech industries and call centres. The research by Collier CRE suggested an average between industrial estates of 1 job per 25-30sqm, which equates in line with Orchard Road Industrial Estate in Strabane.

5.17 Establishing employment levels per hectare is equally problematic. Research by Collier suggests that this could vary from 85 jobs per hectare on a modern industrial estate and up to 600 employees per hectare on an estate with a predominance of call centres. Research by Touche Ross for the Craigavon Economic Revitalisation Strategy 1994–2000 suggested a ratio of 50 employees per hectare. Employee densities in Orchard Road Industrial Estate, Strabane are 46.9 jobs per hectare. However, Orchard Road Industrial Estate is more in keeping with the modern style of industrial/business park where there is a strong mix of industrial and business uses. It is therefore reasonable to assume that an employment ratio of 1 job per 25 square metres floorspace and 50 jobs per hectare can be achieved on new economic development land in Derry-Strabane. This is also in keeping with Invest NI's view that there are opportunities for new hi-tech and business uses but that more traditional indigenous industries will continue to play an important role.

5.18 Applying these employment densities to the number of jobs desired to be created in the industry and service sectors suggest that under Model 2, **61 hectares** of economic land would be required and under Model 3, **67.14 hectares.**

5.19 A criticism of this employment-led approach is that employment growth has been attributed equally between sectors. Thus growth in the primary sector has been assumed, which is unlikely to happen in light of potential changes to agriculture and some people currently employed in this sector may shift to secondary and service employment. The size of the economically active population and unemployment is also unknown. If people have longer working lives in response to a possible rise in the retirement age then this could have a marginal impact, as could more women entering the employment market.

5.20 It should be noted that these figures do not take into account the District's soon to be published Community Plan. These figures will be revised, if required, in light of the CP publication.

6.0 Type and Distribution of Economic Development Land

6.1 The NI Executive's economic vision for 2030 is: 'An economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets and there is growing employment and prosperity for all' *Economic Strategy Priorities for sustainable growth and prosperity – building a better future (Northern Ireland Executive March 2012).* **The Council needs to bear in mind the following considerations in deciding on zonings / policies:**

Foreign Direct Investment (FDI)

6.2. FDIs are commonly made in open economies that offer a skilled workforce and above average growth prospects for the investor. FDIs frequently involves more than just a capital investment, it may include provision of management or technology as well. They may also require readymade Grade A1, usually large-scale, accommodation or have such specific needs that they will require accommodation bespoke to them.

Varied Scale Economic Development

6.3 Large Scale Economic Development offers employment for many and is important to the District's economy. Such sites can rarely be located centrally, whereby they are accessible to all, or close to where there is "employment need". Attention should also be paid to infrastructure, Environmental Health Impact, residential areas proximity, flooding, etc. when considering the location of such sites.

Indigenous Economic Development:

6.4 Research and technology parks, tend to be large-scale projects that house everything from corporate, government or university labs to very small companies. Most research and technology parks do not offer business assistance services, which are the hallmark of a business incubation program. However, many research and technology parks house incubation programs.

6.5 Business incubators differ from research and technology parks in their dedication to start-up and early-stage companies. Enterprise Centres, such as the Enterprise Hub at Skeoge offer start-up businesses existing premises complete with facilities and existing infrastruture. An Enterprise Centre specializes on business growth within the local area and vicinity. Enterprise Centres can provide support for start-up businesses in that there are other such businesses which can offer advice and it is embedded in the local business community and it understands the local issues, strengths and weaknesses.

6.6 The establishment of a digital hub, a cluster of digital content and technology enterprises, could be one way of the Council to attract new businesses. Such companies would be those involved in animation, computer games, web design, mobile applications, online media etc. In order to attract these companies a digital hub must have offices ready-to-go, with competitive rates and flexible terms. First-class infrastructure and services must be standard. Key to this would be a state-of-the-art broadband connectivity.

6.7 The Port, Airport, Magee and Altnagelvin all have the potential for future expansion – and a location for nearby supportive and specialised business enterprises. The Port is already a major employer owns a 100 acre estate at Lisahally. The estate comprises 22 acres located adjacent to the quay and approximately 80 acres of surrounding Port development land. There are currently 14 acres available for future development on Port lands.

6.8 The Airport is subject to significant investment from the executive including £2.5m in route development support and a further £4.5m capital investment. The possible expansion of the airport may mean that new services, typically associated with airports may start to develop around it, i.e. airplane catering, cleaning and servicing providers.

6.9 Potential for the expansion of the Ulster University Magee Campus and Altnagelvin, both of which provide a research offer, should also be minded when considering economic development land.

6.10 We should be mindful of economic development potential in our adjoining Districts including Donegal. For example, the relocation of DARD to Ballykelly with up to 600 jobs and Donegal County Council's draft proposals for the development of the border towns of Lifford or Bridgend and the impacts that such proposals and developments will have on our District.

6.11 At this early stage, the impact of Brexit remains unclear. It has already had a significant effect on exchange rates and we are, as yet, unaware as to what trade deal will be set up between the UK and the EU. It is as yet unclear as to what effect Brexit will have on existing businesses, those people within our District who want to set up businesses and for international businesses outside the region who trade within our District or want to set up businesses in the North West. This is especially potent given that our District has a direct border with an EU Member.

7.0 What we need to do: for Evidence Base and Soundness at Independent Examination

7.1 While much preliminary research and analysis has been undertaken as part of the production of this paper, further work is required to established and underpin a sustainable a sustainable evidence base which will be found sound at the subsequent Independent Examination.

7.2 What we need to do:

- Up to date survey of uptake on zoned and existing lands (quantitative and qualitative)
- Up to date statistics 2015, 2016 or 2011 Census
- Survey of firms, employment densities, plans to expand
- Consult INI, DC&SDC, Transport NI, DEA, Derry's EA's etc.
- Stakeholder Group – Invest NI, Chamber of Commerce,
- Analyse / map economic development v deprivation or unemployment
- Analyse / map economic development v transport and other infrastructure
- Analyse / map economic development v environmental designations and housing
- Assess against SA
- Review policies in PPS4 and PPS21

8.0 Implications of Economic Development for our LDP

8.1 The new style of LDP provides a unique opportunity for the Council to genuinely shape the district for local communities and will enable them to adopt a joined up approach, incorporating linkages to other functions such as regeneration, local economic development and community planning. It is intended that the LDP will be the spatial reflection of the CP and both working towards the same vision for the Council area and our communities and set the long term social, economic and environmental objectives for the Council area.

8.2 In line with the Community Plan, the LDP allows a consideration of how we want our future economy to look, as we seek to positively promote good standards of living, design and environment in a sustainable manner.

8.3 It is necessary to consider how our LDP designations, zonings, proposals and policies can impact on our economic development. The LDP will need to be adaptable and flexible so we provide a good offer of employment land for both FDI and local businesses that want to invest and grow a range of businesses types in our District.

8.4 The LDP should identify the range of existing and proposed industrial sites within the Plan area and bring forward appropriate policies or proposals to encourage economic growth within the District.

8.5 Local policies and proposal may also be brought forward in the LDP which address development such as farm diversification, agriculture and forestry development, tourism / holiday accommodation and re-use / conversion of existing buildings.

9.0 Conclusions and Feedback

9.1 It is recommended that Members note the contents of this paper and we now seek feedback. Members may wish to consider the following:

- Is the existing industry located within the correct areas of the District i.e. ease of travel/public transport/ dirty industry located close to residential areas?
- In light of the current economic climate, is there enough or too much economic development land and is it the right type of land?
- Are the existing industrial zonings attractive to new investments/businesses? Should we consider new sites, and if so where and what type e.g. greenfield or brownfield sites?
- Some retail/offices have relocated to traditional industrial estates. Should we be encouraging this or does this have a negative impact on both the industrial estates and the city/town centres?
- Should businesses in the countryside stay within the rural area or be consolidated within industrial estates in settlements when they reach a certain size?
- Should specific sites be zoned for incubator units to encourage startup businesses?
- What impact will Brexit have on economic development within the District? What can the LDP do to make the District attractive to inward investment and keep existing businesses from moving out of our District?

9.2 The research findings contained in this paper which includes Members views and advice from relevant third parties have informed the following options which have been carried forward and subjected to Sustainability Appraisal (SA) incorporating Strategic Environmental Assessment (SEA) as part of the Preferred Options Paper due to be published on the 31st May 2017.

9.3 In considering the possible options, **Option 1** proposes to retain the existing zonings as contained in the existing area plans, whereas, **Option 2** proposes the retention of the existing zonings together with additional sites focused around areas of high population concentrations, deprivation and key transport links. Finally, **Option 3** proposes the re-evaluation of all our zonings. Based on the research to date and other factors, **Option 2** is considered the most favorable one.

	Option 1	Option 2	Option 3
Economic Development Land	**Retain existing zonings as currently contained in DAP & SAP**	**Retain existing zonings along with additional, more sustainably located, sites that will cater for our assessed future economic needs. Local sites will be focussed in areas of recognised deprivation, close to population centres and accessible.** **Strategic sites will be associated with main transport links – A5 / A6, Buncrana Rd, orbital links and cross-border locations.**	**Re-evaluate all current economic zonings and rezone new sites catering for our assessed future economic needs.**

APPENDICES

APPENDIX 1 – Multiple Deprivation Measure 2010

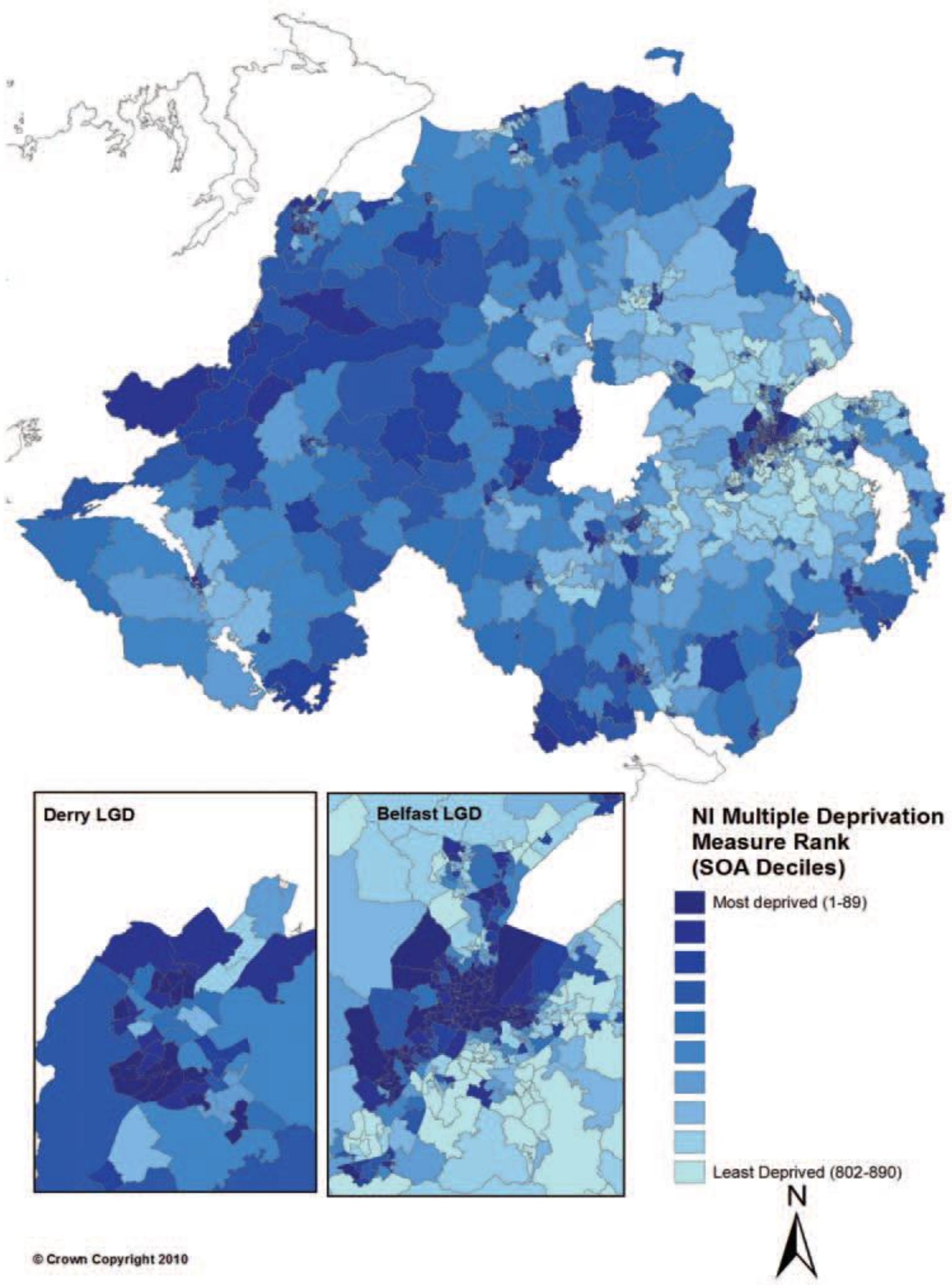
Northern Ireland Multiple Deprivation Measure 2010 Super Output Area results, ranks 1-100

Rank	Super Output Area	LGD
1	Whiterock_2	Belfast
2	Whiterock_3	Belfast
3	Falls_2	Belfast
4	Falls_3	Belfast
5	New Lodge_1	Belfast
6	Shankill_2	Belfast
7	Crumlin_2	Belfast
8	Falls_1	Belfast
9	Ardoyne_3	Belfast
10	Creggan Central_1	Derry
11	Upper Springfield_3	Belfast
12	East	Strabane
13	Clonard_1	Belfast
14	New Lodge_2	Belfast
15	New Lodge_3	Belfast
16	Collin Glen_3	Lisburn
17	Twinbrook_2	Lisburn
18	Shankill_1	Belfast
19	Duncairn_1	Belfast
20	Upper Springfield_1	Belfast
21	Water Works_1	Belfast
22	Crumlin_1_Belfast	Belfast
23	Ballymacarrett_3	Belfast
24	Whiterock_1	Belfast
25	Shantallow West_2	Derry
26	The Diamond	Derry
27	Woodvale_3	Belfast
28	Strand_1_Derry	Derry
29	Shantallow West_1	Derry
30	Clonard_2	Belfast
31	Drumnamoe_1	Craigavon
32	Twinbrook_1	Lisburn
33	Collin Glen_1	Lisburn
34	Drumgask_2	Craigavon
35	Crevagh_2	Derry
36	Highfield_3	Belfast
37	Creggan South	Derry
38	Collin Glen_2	Lisburn
39	Culmore_2	Derry
40	Greystone	Limavady
41	Water Works_2	Belfast
42	Ardoyne_2	Belfast
43	Ardoyne_1	Belfast
44	Brandywell	Derry
45	Shantallow East	Derry
46	Westland	Derry
47	Glencolin_4	Belfast
48	Kilwee_2	Lisburn
49	Creggan Central_2	Derry
50	Ballymacarrett_2	Belfast
51	The Mount_1	Belfast
52	Shaftesbury_3	Belfast
53	Duncairn_2	Belfast
54	Shaftesbury_2	Belfast
55	Drumgor_2	Craigavon
56	Beechmount_2	Belfast
57	Woodvale_1	Belfast
58	Clondermot_1	Derry
59	Ballymote	Down
60	Upper Springfield_2	Belfast
61	Ballycolman	Strabane
62	Glencolin_2	Belfast
63	Woodstock_2	Belfast
64	Ballysally_1	Coleraine
65	Coolessan	Limavady
66	Woodvale_2	Belfast
67	The Mount_2	Belfast
68	Glencairn_1	Belfast
69	Blackstaff_2	Belfast
70	Legoniel_1	Belfast
71	Drumgullion_1	Newry & Mourne
72	Poleglass_1	Lisburn
73	Water Works_3	Belfast
74	Glencolin_3	Belfast
75	Ballymacarrett_1	Belfast
76	Ladybrook_3	Belfast
77	Dunanney	Newtownabbey
78	Shaftesbury_1	Belfast
79	Botanic_5	Belfast
80	Lisanelly_2	Omagh
81	Cliftonville_1	Belfast
82	Coalisland South	Dungannon
83	Devenish	Fermanagh
84	Carn Hill_2	Derry
85	Old Warren	Lisburn
86	Ebrington_2	Derry
87	Glen Road_2	Belfast
88	Altnagelvin_1	Derry
89	Cliftonville_3	Belfast
90	Island_1	Belfast
91	Ballybot	Newry & Mourne
92	Woodville_1	Craigavon
93	Northland	Carrickfergus
94	Ballee	Ballymena
95	Daisy hill_1	Newry & Mourne
96	Chichester Park_1	Belfast
97	Castlederg	Strabane
98	Upper Malone_2	Belfast
99	Court_1	Craigavon
100	Monkstown_1	Newtownabbey

Source NISRA: Northern Ireland Multiple Deprivation Measure 2010 *May 2010*

Map 1 Northern Ireland Multiple Deprivation Measure 2010 (SOAs)

Source NISRA: Northern Ireland Multiple Deprivation Measure 2010 *May 2010*



APPENDIX 2: INDUSTRIAL LAND UPTAKE AND AVAILABILITY

Table 1 Land Take Up Within Zoned Industrial Sites

Settlement	Location	Area Zoned (approx. ha)	Area Remaining Undeveloped (approx. ha)
*Derry (8 sites)	IND 1 Culmore	44.5	42.1
	IND 2 Skeoge	30.2	15.9
	IND 3 Buncrana Road	14.4	10.2
	IND 4 Springtown	4.2	0
	IND 5 Campsey	21.1	13.4
	IND 6 Maydown	79.3	65.3
	IND 7 Newbuildings	13.5	5.6
	MU 1 Iona Park (mixed use)	1.9	0
	Derry total	**209.1**	**152.5 (73%)**
**Strabane	SE 29.6.1 Dublin Road	4.9	1.3
	SE 29.6.2 Orchard Road	10.5	2.6
	Strabane total	**15.4**	**3.9 (25%)**
**Castlederg	CG 57.2 Castlegore Road	2.8	1.6
Newtownstewart	NT 77.2 Baronscourt Road	2.1	0.4
Sion Mills	SS 68.2 South of the Mill complex	3.1	3.0
	Strabane Local Towns total	8.0	5.0 (63%)
	Derry & Strabane total	232.5	161.4 (69%)

Source:
**DOE Industrial Site Surveys 2011 - Strabane
*DOE Industrial Site Surveys 2013 - Derry

Table 2: Estimated Remaining Capacity of Unzoned Industrial Land

			Remaining Capacity	
Settlement	**Location**	**Approx Site Area (ha)**	**Approx Site Area (ha) Undeveloped**	**Approx Site Area (ha) Vacant**
Derry City – City Side **9 Sites**	Bay Road	13.2	1.1	0.1
	Lenamore	0.79	0	0.04
	Northland Road	2.15	0.5	0.2
	Pennyburn	24.04	1.7	6.1
	Rath Mor	1.99	0	0.4
	Seagate	3.96	0	0
	Springtown	35.04	3	3.4
	Ulster Science & Technology Park	4.52	0	0.6
	Fort George	New site - not surveyed		
Derry City – Waterside	Altnagelvin	6.86	0	0.4
5 Sites	Drumahoe	6.43	6.4	0
	Glendermott Road	2.74	0.7	0
	Glendermott Valley Business Park	0.98	0	0.1
	Trench Road, Altnagelvin	0.68	0	0.4
Village and adjacent to village sites	Ardmore	0.69	0	0
7 Sites	Chambers	2.42	0	0
	Claudy	2.05	0	2
	Eglinton –Rural Benbow	3.78	0.9	0.2
	Eglinton Village	5.11	1.5	0.6
	Newbuildings Business Centre	0.18	0	0.1
	Newbuildings – Woodside Rd	2.92	0	2.9
Countryside Sites	Campsie	89.81	25.2	27.3
3 Sites	Maydown	274.12	139.1	3.6
	Longfield	13.23	0.1	0.5
Derry Total Sites		497.69	180.2	48.9
Strabane	Ballycolman Industrial Est	3.9	0	1.2
	Dublin Rd Industrial Est	6.2	0	1.0
	Strabane Business Park	c.8.9	c.8.9	0
Strabane Total Sites		19.00	8.9	2.20
District Total Sites		**516.69**	**189.1**	**51.1**