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Executive Summary

This Position Paper provides an overview of the employment and economic land baseline in the Lisburn & Castlereagh City Council area to assist in the preparation of the Local Development Plan 2032.

The Local Development Plan is made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to provide a baseline position on which policy and proposals for economic development in the Local Development Plan can be shaped over the plan period.

It is important to stress that in compiling the Position Paper the best information available has been used however further revisions may be required in light of the release of any new data or updated policy, advice or information. This paper provides an update on the previous Position Paper which was produced as part of the preparation of the Preferred Options Paper and has been informed by consultations with the relevant statutory consultees.

The aims of the paper are:

- To provide baseline information which will inform the Local Development Plan;
- To assess the land use needs of a growing employment and economic sector in the Lisburn & Castlereagh City Council area; and
- to provide the spatial representation of the Council's Community Plan having regard to other plans and strategies being undertaken by the Council.

1.0 INTRODUCTION

- 1.1 This paper examines the employment/industrial requirements for the Lisburn & Castlereagh City Council area. This involves an assessment of both existing employment land developed and undeveloped. The need for any additional employment zonings up until 2032 is also considered.
- 1.2 Chapter 2 sets out the regional context for economic development, which is formulated within the context of the Regional Development Strategy (RDS) 2035, the Strategic Planning Policy Statement for Northern Ireland (SPPS) and regional Planning Policy Statements (PPSs).
- 1.3 Chapter 3 outlines an assessment of the existing Development Plan context including employment/industrial zoned land and extent of past take up.
- 1.4 Chapters 4 and 5 provide an overview of the economic profile and employment baseline of the new Council area followed by an evaluation of the need for future employment opportunities, including an indication of how many jobs are required to cater for a growing population and how employment growth can be accommodated across the Council District up to 2032.
- 1.5 Information has been derived from the Northern Ireland Statistics and Research Agency (NISRA), DfI Planning (Statistics and Surveys), the Electoral Office NI and other sources where specified.
- 1.6 The key findings and conclusion are provided in Chapter 6.

2.0 REGIONAL POLICY CONTEXT

2.1 The regional policy context is provided by the Regional Development Strategy (RDS) 2035, the Strategic Planning Policy Statement for Northern Ireland (SPPS) 2015 and regional Planning Policy Statements (PPSs) where relevant. A summary of these documents as they relate to plan making and economic development policy is provided in the following paragraphs.

Regional Development Strategy 2035 (RDS)

2.2 The RDS provides an overarching strategic framework to facilitate and guide development in the public and private sectors in support of the Programme for Government (PfG). The RDS has a statutory basis prepared under the Strategic Planning (Northern Ireland) Order 1999. Local development plans must 'take account' of the RDS.

2.3 The RDS 2035 provides a Spatial Framework for strong sustainable development across the region and includes regional guidance under three themes Economy, Society and the Environment. The Strategy provides opportunities for the physical and social progress of Northern Ireland up to 2035.

2.4 The Economy is one of the three themes making up the Regional Guidance (RG) contained in the RDS.

2.5 Regional Guidance (RG1) aims to ensure an adequate and available supply of employment land to facilitate sustainable economic growth. The supply of employment land should be accessible and located to make best use of available services. The focus will be on larger urban centres and regional gateways due to their locations on the regional transport network.

2.6 The RDS provides an employment land evaluation framework reproduced at (Table 1) to enable the council to identify robust and defensible portfolios of both strategic and locally important sites in their development plans. This will safeguard both new and existing employment areas for employment rather than other uses.

Table 1: RDS 2035 Employment Land Evaluation Framework

<p>Stage 1 Taking Stock of the Existing Situation</p>	<p>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 and protected and identifying sites that should clearly be released for other uses.</p>
<p>Stage 2 Understanding Future Requirements</p>	<p>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.</p>
<p>Stage 3 Identifying a ‘New’ portfolio of sites</p>	<p>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</p>

	provide a robust justification for altering allocations for employment land.
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2.7 This guidance seeks to:

- protect zoned land in providing a valuable resource for local and external investment;
- promote economic development opportunities across the region focused on the BMUA, Londonderry and the Hubs as the main centres for employment and services; and
- provide a network of economic development opportunities with provision in development plans for an adequate and continuous supply of land for employment purposes.

2.8 The RDS includes Spatial Framework Guidance (SFG) relating to the five components of the framework i.e. the metropolitan area centred on Belfast; Londonderry principal city of the North West; Hubs and Clusters of Hubs; the rural area; and Gateways and Corridors. A substantial part of the Lisburn & Castlereagh City Council area is contained within the Belfast Metropolitan Urban Area (BMUA) as defined in the RDS.

2.9 Within the BMUA, the RDS recognises the urban area of Lisburn benefits from its location at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor. Potential exists to grow the retail offer and high quality office offer through the creation of employment in business services. Potential also exists to generate a new driver for the night-time economy and to provide a range a flexible commercial accommodation and business parks at Blaris and the Maze/Long Kesh locations.

- 2.10 The RDS at SFG1 promotes urban economic development at key locations throughout the BMUA¹ and ensure sufficient land is available for jobs. Requirements of the guidance are to:
- identify and protect key locations for economic growth. Two major employment/industrial locations are noted within the council area those being West Lisburn/Blaris and Purdysburn.
 - enhance Lisburn City as a major employment and commercial centre. The RDS recognises Lisburn is strategically located at the meeting of key transport corridors and has high development potential and the scope to generate additional jobs. Projections suggest that between 2008 and 2028 the former Lisburn District Council would account for nearly 10% of the total increase in employment.
- 2.11 The RDS also recognises the importance of the rural area. To sustain rural communities new development and employment opportunities which respect local social and environmental circumstances are required. This means facilitating the development of rural industries, businesses and enterprises in appropriate locations. Guidance contained in SFG13 recognises the importance of sustaining rural communities living in smaller settlements and the open countryside by facilitating the development of rural industries, businesses and enterprises in appropriate locations. This includes farming, forestry and fishing but other industries such as recreation, 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.

Strategic Planning Policy Statement (SPPS)

- 2.12 The SPPS was published in September 2015. The aim of the SPSS is to facilitate the economic development needs of Northern Ireland in ways

¹ Lisburn City and Castlereagh form part of the Belfast Metropolitan Urban Area (BMUA). The nearest hubs are Craigavon and Banbridge to the South, Newtownards to the East and Antrim to the North.

consistent with the protection of the environment and the principles of sustainable development.

2.13 The SPPS provides regional policy objectives for facilitating economic development to:

- Promote sustainable economic development in an environmentally sensitive manner;
- Tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and 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 and buildings where they meet the needs of particular economic sectors;
- Promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
- Ensure a high standard of quality and design for new economic development.

Role of Local Development Plan

2.14 The SPPS identifies the following strategic policy which must be taken into account in the preparation of the LDP

- Provisions made for economic development through the LDP process will inform planning decisions in urban areas.
- Class B1 business uses should be permitted if located within city or town centres and other locations that are identified in the LDP.
- The LDP will not normally zone land for economic development purposes in villages and small settlements as this could inhibit flexibility.
- Any decision to reallocate previously zoned land for economic purposes ought to be made through the LDP process.

2.15 The SPPS in the implementation section states:

- A fundamental role for LDPs is to ensure that there is an ample supply of suitable land available to meet economic development needs within the plan area. The LDP should zone sufficient land for economic development over the plan period .LDPs 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, specialised needs of specific economic activities, potential environmental impacts and compatibility with nearby uses including the operational requirements of existing or approved economic development;
- Where appropriate LDPs should identify previously developed land within settlements for potential economic development use. This will serve to return vacant or underused land to productive use and to create more attractive environments;
- LDPs should also 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;
- Where appropriate, LDPs should specify the type or range of economic development uses that will be acceptable within zoned sites or broader areas of economic development designated by the Plan;
- LDPs should normally contain a number of supporting actions to assist in meeting the needs of business enterprises in ways which are workable and that will ultimately deliver sustainable and high quality development. The LDP should also provide guidance in terms of key design, layout and landscaping requirements

PPS 4 Planning and Economic Development

2.16 PPS 4 Planning and Economic Development published in November 2010 sets out the regional policies for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. Its remit covers industrial, business and storage and distribution uses as currently defined in Part B “Industrial and Business Uses” of the Planning (Use Classes) Order (NI) 2004.

2.17 The key aim of this PPS is to facilitate the economic development needs of the Region in ways consistent with the protection of the environment and the principles of sustainable development.

2.18 The policy objectives of PPS 4 are:

- to promote sustainable economic development in an environmentally sensitive manner;
- to tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality, size and location;
- to sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
- to support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
- to promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and

- to ensure a high standard of quality and design for new economic development.

2.19 PPS 4 details particular matters that should be assessed as appropriate in the course of preparing a development plan namely:

- an estimate of the amount and the location of land required to ensure an ample supply of suitable land to meet economic development needs; (taking into account various factors which are listed)
- the range of acceptable employment uses within designated areas for economic development; (taking into account various factors which are listed)
- supporting action needed to assist in the delivery of economic development;
- the need to constrain development of land in the vicinity of establishments where hazardous substances are or may be present; and
- the new baseline position for further monitoring and review of the opportunities for economic development.

2.20 In light of the assessment undertaken during the course of preparation development plan proposals will accommodate those measures considered appropriate from the following

- Meeting economic development needs
- Acceptable employment uses
- Supporting actions

Planning Strategy for Rural Northern Ireland

- 2.21 Prior to the publication of PPS 4 the prevailing planning policies for economic development in rural Northern Ireland were contained in the document A Planning Strategy for Rural Northern Ireland. While the vast majority of this document has been superseded by PPSs, there are parts that have been retained that specifically deal with employment and economic development. These include policies IC 16 Office Development and IC 17 Small Office and Business Development insofar as they apply to Class B1 of the 2015 Use Class Order.

Transitional Period

- 2.22 A transitional period will operate until such times as a Plan Strategy for the Lisburn & Castlereagh City Council area has been adopted. During the transitional period planning authorities will apply existing policy contained within Planning Policy Statement 4 Economic Development together with the SPPS. Any conflict between the SPPS and any policy retained under the transitional arrangements must be resolved in the favour of the provisions of the SPPS.

Anti-Poverty and Social Inclusion Strategy

- 2.23 The Government's "Anti-Poverty and Social Inclusion Strategy" (Lifetime Opportunities) was published by the Office of the First Minister and Deputy First Minister in 2010. It outlines a set of 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. One of the main functions of a development plan is to facilitate development and 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

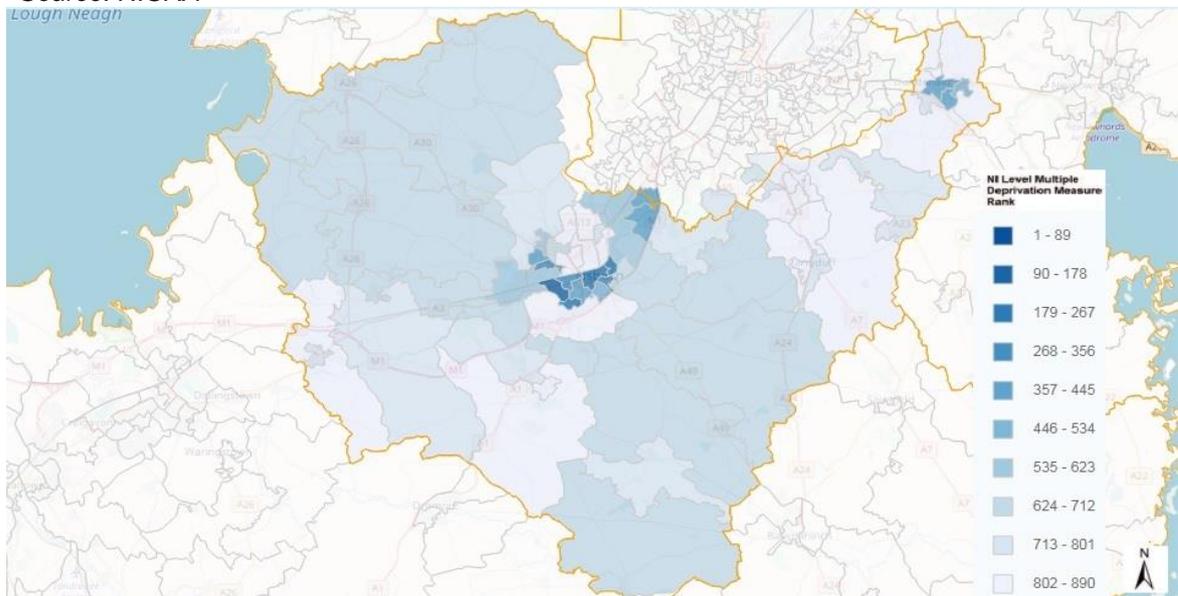
can also support the Anti-Poverty and Social Inclusion Strategy, and assist with economic regeneration and physical renewal. This can help to stimulate enterprise in the most disadvantaged areas in order to tackle long-term unemployment and issues of employability.

2.24 The Northern Ireland Multiple Deprivation Measure is used as a measure of the spatial distribution of deprivation across NI .The updated Multiple Deprivation Measure (NIMDM 2017) identifies small area concentrations of multiple deprivation replacing the NIMDM 2010 as the official measure of deprivation across Northern Ireland.

2.25 Of the 68 Super Output Areas (SOAs) covering the LCCC area only 2 are classified as being in the top 20% of most deprived SOAs in the whole of NI Old Warren being the most deprived SOA within the LCCC area.

Figure 1: Northern Ireland Multiple Deprivation Measure, Lisburn and Castlereagh City Council wards, 2017

Source: NISRA



The Northern Ireland Executive Economic Strategy: Priorities for Sustainable Growth and Prosperity

2.26 The Northern Ireland Economic Strategy was published by the Minister for Enterprise Trade and Investment in March 2012. There have been subsequent annual monitoring reports up until 2016. The overarching goal of the Strategy is to improve the economic competitiveness of the Northern Ireland economy. For the purpose of achieving that goal, the Strategy has focused on creating a larger and more export-driven private sector, a move away from an economy that has traditionally been dependent on the public sector. The readdressing of this imbalance is to be done through encouraging innovation and research and development, improving skills, establishing a sustainable economic infrastructure, competing in a global market place and encourage growth in existing local companies.

2.27 In terms of developing economic infrastructure the long term goals for the region are:

- developing an efficient transportation system;
- investing in telecommunications to improve capacity for digital and knowledge based economies; and
- the improvement of public infrastructure such as social, health and educational facilities.

2.28 While responsibility for implementing the strategy lies with many Government Departments these goals are areas into which land use planning can play an active part aiding their delivery.

Lisburn & Castlereagh Investment Plan

2.29 The Council published its 10 year investment plan entitled Connect, Invest, Transform in mid-2019. This plan proposition aims to connect the objectives of the Corporate Plan, Community Plan and the LDP through a comprehensive investment plan. This is consistent with the emerging place shaping agenda. The plan has a set of guiding principles and the Investment Plan Proposition aims to maximise council and appropriate partner resources to help boost the local economy whilst minimising the

cost to the ratepayer. With an initial investment fund in the region of £250 million proposing to undertake a significant programme of work to reshape our area.

3.0 EXISTING DEVELOPMENT PLAN

Belfast Metropolitan Area Plan 2015 (BMAP)

3.1 The Belfast Metropolitan Area Plan (BMAP) 2015 is a development plan prepared under the provisions of Part 3 of the Planning (Northern Ireland) Order 1991 by the former Department of the Environment (DOE). The Plan covers the City Council areas of Belfast and Lisburn and the Borough Council areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. The Plan was adopted on 9th September 2014, however the Court of Appeal declared the adopted plan unlawfully adopted on 18th May 2017.

3.2 As a result, the existing Development Plans covering the Council area are as follows:

- Belfast Urban Area Plan (BUAP) 2001
- Lisburn Area Plan (LAP) 2001
- Carryduff Local Plan 1988-1993
- Ballymacoss Local Plan
- Lisburn Town Centre Plan
- Lagan Valley Regional Park Local Plan 2005

3.3 BMAP in its post-inquiry form was at an advanced stage and therefore remains a material consideration. Draft BMAP (November 2004) in its pre-inquiry form also remains a material consideration in conjunction with recommendations of the Planning Appeals Commission Public Local Inquiry Reports.

3.4 Volume 3 and Volume 5 of BMAP 2015 sets out policies on the former Lisburn and Castlereagh Districts respectively. These policies have

been developed in the context of the Plan Strategy and Framework contained in Volume 1 of the Plan and are in general conformity with the RDS.

3.5 Within BMAP 2015 the settlement hierarchy in Lisburn District consists of Lisburn City, Metropolitan Lisburn, the small towns of Moira and Hillsborough, 12 villages and 30 small settlements as identified in Designation SETT 1 in Part 3, Volume 1 of the Plan (Table 3.1). The District Proposals designate Settlement Development Limits and sets out designations, policies, proposals and zonings for individual locations within these settlements in accordance with the BMA Settlement Strategy.

3.6 Within BMAP 2015 the settlement hierarchy in Castlereagh consists of Metropolitan Castlereagh, the town of Carryduff, the village of Moneyreagh and the small settlements of Ballyknockan, Crossnacreevy, and Ryan Park as identified in Designation SETT 1 in Part 3, Volume 1 of the Plan. This information contained in Sett1 has been refined and is presented in Table 1

Table 1: Settlement Hierarchy for Lisburn & Castlereagh City Council District within BMAP 2015

Settlement Hierarchy	Lisburn	Settlement Hierarchy	Castlereagh
City	Lisburn	Metropolitan	Metropolitan Castlereagh
Towns	Hillsborough and Culcavy Moira	Towns	Carryduff

Villages	Aghalee Annahilt Dromara Drumbeg Drumbo Glenavy Lower Ballinderry Magheraberry Milltown Ravernet Stoneyford Upper Ballinderry	Villages	Moneyreagh
Small Settlements	Ballyaughlis Ballycarn Ballylesson Ballynadolly Ballyskeagh Boardmills Carr Drumlough Drumlough Road Dundrod Duneight Edenderry Feumore Halfpenny Gate Halftown Hillhall Kesh Bridge Lambeg Legacurry Long Kesh Lower Broomhedge Lurganure Lurganville Lurgill Magheraconluce Morningside Purdysburn St. James	Small Settlements	Ballyknocken Crossnacreevy Ryan Park

	The Temple Tullynacross Upper Broomhedge		
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Existing employment zonings within BMAP 2015

3.7 BMAP 2015 designates a number of locations within Lisburn City (LC), Metropolitan Lisburn (ML), Metropolitan Castlereagh (MCH) and Carryduff (CF) as suitable for employment/industrial zones. The uptake of land zoned for employment/industrial use is contained within Table 3.2 below:

Table 2: Existing employment zonings BMAP 2015

BMAP Existing Employment Zoning and Location	Area Developed/Committed (Hectares)	Area Remaining (Hectares)
LC10 Blaris Industrial Estate, Altona Road	24.46	0.770
LC11 Enterprise Crescent, Ballinderry Road	13.19	0
LC12 Ballinderry Road	7.43	0
LC13 Flush park Industrial Estate, Knockmore Road/Moira Road	4.92	3.55
LC14 Lissue Industrial Estate, Moira Road	49.09	3.73
LC15 Coca cola Plant, Lissue Road	17.3	1.17
ML05 Seymour Hill Industrial Estate	6.07	4.73
ML06 Dunmurry & Derriaghy Industrial estate	39.27	5.27
MCH07 Newtownbreda Factory Estate, Cedarhurst Road	1.2	0
MCH08	1.64	0.38

Cedarhill Industrial Estate, Beechill Road		
CF07 Cyril Johnstone & Co Ballynahinch Road	2.19	0
CF08 Carryduff Business Park Comber Road	5.04	0.090
CF09 Saintfield Road, Carryduff	3.33	0.47
CF10 Eastbank Road, Carryduff	0.86	1.1
CF11 Edgar Industrial Estate	5.97	0.76
CR01 Maryland Industrial Estate, Crossnacreevy	5.47	0.11

Table 3: Uptake of land zoned for employment BMAP 2015

BMAP proposed Employment Zoning and Location	Total Area Zoned (Hectares)	Area Developed/Committed (Hectares)	Area Remaining (Hectares)
LC05 Blaris Road	119.47	14.49	104.98
LC06 Knockmore/Lissue Road	3.09	0	3.09
LC07 Lissue Road	14.34	3.48	10.86
LC08 Barbour Threads Mixed Use	5.53	2.7	2.83
LC09 Ballinderry/Knockmore Road	44.3	26.56	17.74
GY05 Land north west of Gobrana Road, Glenavy	6.27	0	6.27
MCH05 Land SE of Millmount/Comber Road	9.27	0.71	8.56
MCH06 Land at Upper Newtownards/Carrowreagh Road	34.90	11.82	23.08

MCH12	Forster Green Hospital, Upper Knockbreda Road	2.54	2.34	0.2
MCH13	Knockbracken Healthcare Park, Saintfield Road, Purdysburn	85.54	41.53	44.01
CF05	Ballynahinch Road, Carryduff	11.74	0.45	11.29
CF06	Comber Road, Carryduff	5.55	0.29	5.26
DA05	Land South of Woodvale, Rathfriland Road, Dromara	3.54	0.26	3.28
LN07	Lands at Glenavy Road, Moirá	24.06	12.26	11.80
Total		370.14	116.89	253.25

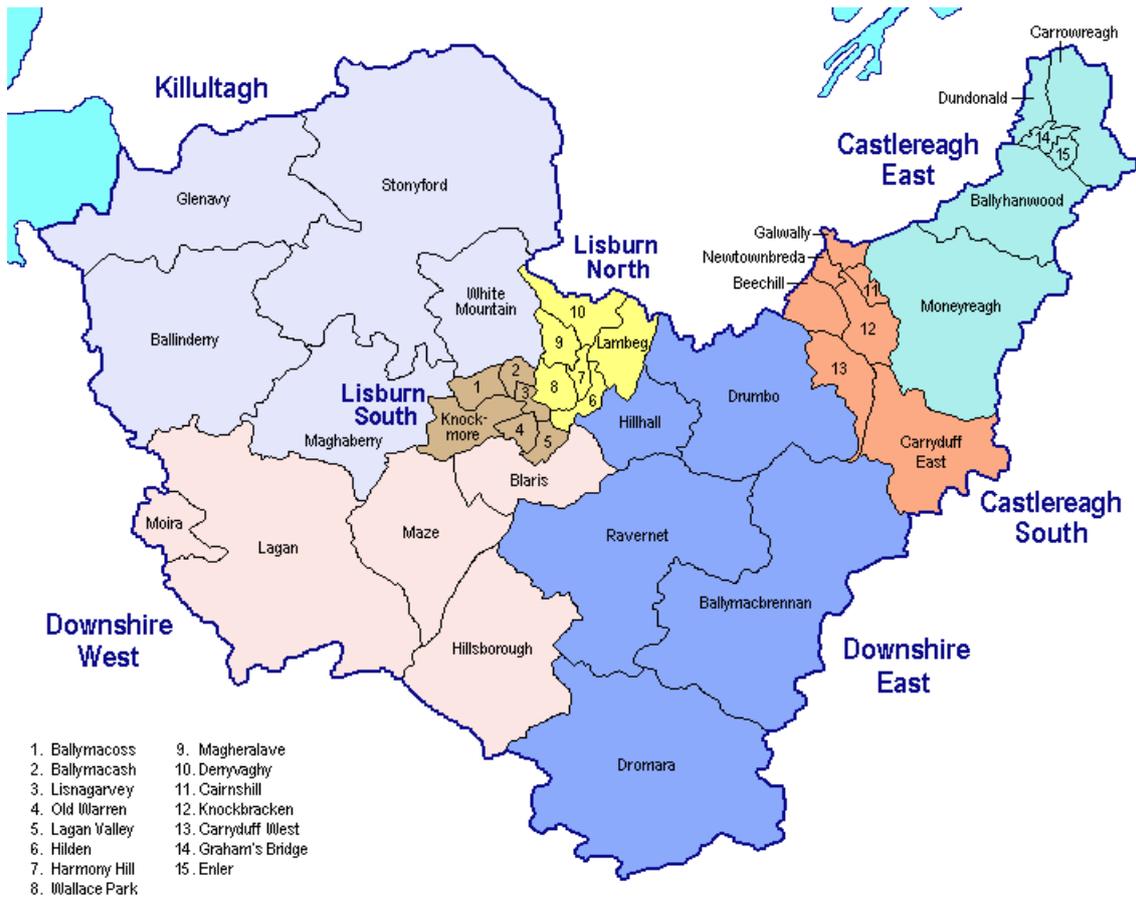
Source:LCCC Employment Land Monitor (2015-2019) / Lichfields analysis

4 ECONOMIC PROFILE

Population Lisburn & Castlereagh City Council Area

- 4.1 The Lisburn & Castlereagh City Council area comprises the former districts of Lisburn City and Castlereagh Borough Districts save for certain wards which transferred over to the Belfast City Council which included the localities of Gilnahirk, Tullycarnet, Braniel, Castlereagh, Merok, Cregagh, Wynchurch, Glencregagh and Belvoir, Collin Glen, Poleglass, Lagmore, Twinbrook, Kilwee and Dunmurry.

Figure 2: The Lisburn & Castlereagh City Council Area



4.2 Based on NISRA 2018 mid year population estimates statistics (Table 4). the total population of the Lisburn & Castlereagh City Council area is seventh in population size out of the eleven councils with an estimated population of 144,400.

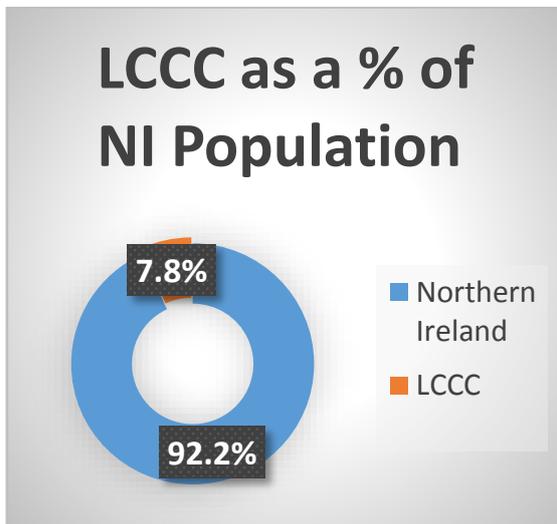
Table 4 Population estimates by Local Government Districts

Total NI Population	New Local Government Districts	Population of District
1,881,700	Belfast	341,900
	Armagh, Banbridge and Craigavon	214,100
	Newry, Mourne and Down	180,000
	Ards and North Down	160,900

	Derry City and Strabane	150,700
	Mid Ulster	147,400
	Lisburn and Castlereagh	144,400
	Causeway Coast and Glens	144,200
	Antrim and Newtownabbey	142,500
	Mid and East Antrim	138,800
	Fermanagh and Omagh	116,800

Source: NISRA mid-year estimates 2018

Figure 3: Population of Lisburn & Castlereagh City Council Area



Source: NISRA 2018 Mid-year estimates

Population Projections

4.3 The following population estimates for Lisburn & Castlereagh City Council area are shown in Tables 5 and 6 :

Table 5: Population Projections for Lisburn & Castlereagh City Council District - 2012-2037

	2017	2020	2027	2030	2037	2040
Northern Ireland	1,870,737	1,896,270	1,945,744	1,961,529	1,989,771	2,000,129
Lisburn & Castlereagh	143,830	146,379	154,805	157,926	164,360	167,024

Source: NISRA 2016-based population projections

4.4 The corresponding household projections take account of population growth, a reduced size of household and the changing age structure of the population, could lead to an increase from 55,786 to 68,098 in the number of households by 2040. The average household size in Lisburn and Castlereagh City Council has been projected to steadily decrease from 2.52 people per household in 2017 to 2.41 people per household in 2040. This follows the projections for Northern Ireland which predicts households will decrease to 2.54 people per household in 2017 to 2.43 in 2040.

Table 6: Household Projections for Lisburn & Castlereagh City Council District

	2017	2020	2027	2030	2037	2040
Northern Ireland	728,783	740,528	772,903	784,580	805,015	811,776
Lisburn & Castlereagh	55,786	57,508	61,868	63,490	66,803	68,098

Source: NISRA 2016-based household projections

4.5 Whilst the economic climate that has prevailed since 2007 has impacted on the demand for development land, there are indications that a slow recovery in the economy is underway. It is therefore important that there

is adequate availability of development land to increase choice and flexibility and thus stimulate investment.

Existing Employment Base

4.6 In order to assess the provision of economic development over the plan period it is necessary to consider the present picture of business and the labour market across the district. In examining the current situation reference is made to the regional position for the purpose of comparison and providing a context.

4.7 The following paragraphs set out, the nature of industry and employment in the new Lisburn & Castlereagh City Council area, in terms of existing employment uses, strengths and weaknesses, and those areas most affected since the downturn in the economy in the last seven years. The labour market is examined in terms of the number of economically active population that are in employment and those that are claiming benefits. Finally there is a consideration on the skills and qualifications within the population and how it relates to the type of employment that will drive the future economy.

Table 7 Employee Jobs by Industry

	Total No of Jobs	Total Jobs in Manufacturing	Total Jobs in Construction	Total Jobs in Services	Total Jobs Other
NI	759,358	86,519 (11.5%)	35,498 (4.7%)	625,967 (82.4%)	11,374 (1.4%)
Lisburn & Castlereagh	57,888	6,054 (10.5%)	3,196 (5.5%)	47,854 (82.7%)	784 (1.3%)

Source: NI Business Register and Employment Survey 2018: Figures exclude Agriculture

- 4.8 The highest percentage of jobs in Lisburn & Castlereagh City Council Area in 2018 was in the service sector which was similar to the NI trend. Lisburn & Castlereagh City Council has a higher percentage of jobs in construction (5.5%) than the NI average of 4.7% respectively. It has 10.5% employed in manufacturing compared to the NI average of 11.5%. In the other two sectors the employment rates are comparable.
- 4.9 Just over 73% of residence in Northern Ireland aged 16-64 years were economically as recorded in the labour force survey Oct-Dec 2018 Census. The remainder (26%) were classified as economically inactive. The corresponding figures for Lisburn and Castlereagh LGDs are economically active just over 81% and just under 19% economically inactive. The highest proportion of economically active persons 81.3% live in Lisburn and Castlereagh LGD

Table 8 Composition of the Economically Inactive, aged 16-74, for the Lisburn & Castlereagh City Council District, Census 2011

	Total number economic ally active	(%)	Total number economic ally inactive	(%)
Northern Ireland	856,000	73.3	312,000	26.7%
Lisburn & Castlerea gh	74,000	81.3	17,000	18.7%

Source: NISRA Labour Force Survey Oct-Dec 2018

- 4.10 According the smallest proportion of economically inactive residents in Northern Ireland were recorded within the Lisburn and Castlereagh LGD 18.7%.

Table 9 Car or Van availability for the Lisburn & Castlereagh City Council District, Census 2011

	All households	No cars or vans in household (%)	1 car or van in household (%)	2 or more cars or vans in household (%)
Northern Ireland	703,275	22.7	41.4	35.9
Lisburn & Castlereagh	52,648	15.3	41.9	42.9

Source: NINIS, NISRA (2014) TABLE KS405NI

4.11 Households in Lisburn and Castlereagh are within the top 3 LGDs in Northern Ireland most likely to have access to two or more vehicles.

Skills Profile

4.12 It is anticipated that future economic growth will transition towards high value added exportable activities and if Lisburn & Castlereagh City Council area is to participate in this direction it will have to supply a suitable skilled and qualified workforce.

4.13 Education has an important role in promoting economic well-being. Better education improves access to employment opportunities, raises productivity and creativity and promotes entrepreneurship and technological advances. In addition it plays a very crucial role in securing economic and social progress and improving income distribution. Since 2001, the proportion of people in Northern Ireland aged 16 years old and over who have a degree or higher qualification has significantly increased (24%) compared to a much more modest reduction in the proportion who have no or low qualifications. This would suggest that the opportunities for those who already have qualifications

have improved whereas there is little opportunity for advancement for those with low or no qualifications.

Table 10 Level 4+ Qualifications (and no qualifications), aged 16 and over for the new Lisburn & Castlereagh City Council District, Census 2011

	All usual residents: Aged 16+ years	No or low qualifications: (%)	Level 4 qualifications and above (%)
Northern Ireland	1,431,540	29.1	23.7
Lisburn & Castlereagh	107,340	23.3	29.5

Source: NINIS, NISRA (2014) TABLE KS501NI

4.14 Residents aged 16 and over in Lisburn and Castlereagh (29 per cent) were most likely to have Level 4 and above qualifications compared to any other LGD within Northern Ireland.

5.0 NEED FOR FUTURE EMPLOYMENT OPPORTUNITIES

5.1 The Council undertook several economic studies of the district from 2010 to 2018. The ‘Socio Economic Profile and Economic Forecast Report’ was prepared by Oxford Economics covering the period 2018-2032. A summary of the key findings of this report are set out below.

Key Findings of Economic Report

- In 2017 average productivity in Lisburn & Castlereagh was £40,500 (in 2016 prices), £2,700 or (6.1%) lower than the NI average.

- Population levels in the new Lisburn & Castlereagh City Council area are expected to rise by 8,300 (or 5.8%) over the period 2018-2032 this is an increase of 0.4 per cent per year. Twice the expected NI growth rate of 0.2%.
- The local economy has a relatively high share of jobs in sectors such as health public administration, wholesale, retail, arts as well as entertainment and recreation.
- Opportunities are in private services and the office sector. Retailing could also be supported. Diversifying the economy and increasing opportunities to cluster and evolve could grow individual sectors. The main sectors for growth include information and communication, professional services as well as administrative and support services
- Productivity will increase in line with the rest of the region with employment growth to increase at an average of 0.39% per year.

Assessment of Future Need

- 5.2 As set out in PPS 4 Planning and Economic Development, an estimate of the amount and location of land required should be carried out to ensure an ample supply of suitable land is available to meet economic needs. The council commissioned an employment land review 2019 which examined a range of scenarios to indicate the amount of employment land required over the plan period.

Scenario 1: Baseline

- 5.3 This applies the outputs of the employment forecast for the years 2017-2032 prepared by Oxford Economics (Q3 2018). There are inherent limitations using anticipated future regional and macroeconomics assumptions.
- 5.4 However, forecasts are seen as a valuable input to indicate the broad scale and direction of growth in various sectors. The initial calculation indicates the need for an additional 3.5 ha of employment land from 2017-2032.

Scenario 2: Sensitivity 1 and 2 the netting and no netting off of employment land

- 5.5 Both of these have been applied to the baseline scenario. The no netting off is job losses in one sector cannot be offset against gains in other sectors within the same use class. Again there are limitations to this form of projection.
- 5.6 The netting off again starts with the baseline scenario. It effectively nets off employment gains in office and storage/distribution sectors against job losses in industrial activities. Again there are limitations and it does not allow for choice, churn and flexibility as well as for the replacement of any sites that are lost to non-B uses.

Scenario 3: Past Employment Trends (1993-2017)

- 5.7 Past trend based approaches offer the advantage of reflecting actual performance. The caveat being there is no certainty that historic conditions will be repeated in the future

Scenario 4: Labour Supply

- 5.8 In contrast to the previous scenarios this approach is focused upon the future supply of labour rather than the demand for labour created by economic growth. It is based on the number of jobs required to match the future supply of working aged people and then extrapolates this into the amount of employment land required to accommodate these jobs.

Scenario 5: Past Completions

- 5.9 This is based on past completions of employment sites. The area of concern is that the data collection period is not sufficient to even out demand fluctuations. Once again however it provides a useful comparison in the estimation of future need if they continue to carry on at the same or similar level.

5.10 A full explanation of each of the given scenarios and a summary of the findings are included in the Employment Land Review which is contained with Technical Supplement 3.

6.0 KEY FINDINGS AND CONCLUSION

6.1 A summary of the key findings are as follows:-

- Opportunity exists to maximise the strategic location of Lisburn on the Dublin economic corridor and East/West transport corridor. The Council area has a growing and skilled population with higher than average economic activity rates and low unemployment. The main job growth has been in non B class sectors with the largest sectors of the economy being Health and social work,, wholesale and retailing followed by manufacturing , public services and construction.;
- There is still the need to recognise the potential that exists to attract inward large scale investment to deliver development on the Blaris Employment zoning through the provision of the M1 Knockmore Link, the North Lisburn Feeder Road and other improvements to the transportation system. This is seen to align with the Councils overall approach to this area and the west Lisburn Development framework.
- Recognise the potential that exists to promote the regionally significant site Maze/Long Kesh which remains in public ownership to provide economic growth across the Council area;
- It is vital to include a margin of flexibility to reflect uncertainty in the market whilst providing potential developers a choice of sites. The review has identified the amount of land required over the plan period. It is important to note that the assessments are all policy neutral. They are based on forecasts, trends and completions but no account is taken of any specific measures to boost the economy

- The distribution and quality of the land supply is to be retained across the council area. Differing locations will appeal to a range of different businesses and sectors. This also facilitates a balance of economic growth across the council area which is a key objective for the future provision of employment land during the plan period.going Connectivity, infrastructure and provision of a high quality design environment is also to be encouraged.

CONCLUSION

6.2 Following on from the original Position Paper in September 2015, the purpose of this paper has been to update the baseline information regarding the economic land and employment profile within the Lisburn & Castlereagh City Council area and examine the need for further employment and economic development opportunities. This baseline will support the preparation of the Plan Strategy and Local Policies Plan, and as the process evolves will be updated/amended as necessary taking account of all relevant new information made available.