

Amplify

The Integrated Economic Development Strategy and Action Plan for Mid & East Antrim

The Strategic Framework

December 2016



Our Vision

By 2030, we want Mid and East Antrim to be:

- A nationally competitive economy, with Output, Productivity and Wage Rates at least 95% of the UK (including London) average
- Northern Ireland's leading centre for Advanced Manufacturing and Agri-Food with recognised capabilities in Tourism, Financial and Business Services, and Digital Technologies
- Operating with an economically active population equal in size in percentage terms to the UK (including London) average, known for its high-level skills, and providing critical labour mass in our priority sectors
- A proud, vibrant, and ambitious place, which collaborates with other centres, encourages business and its investment, and is recognised for people wanting to live and work here.

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Contact: John Nolan Tel: 0131 225 4007 email: jnolan@sqw.co.uk

Approved by: Simon Pringle Date: 15/12/16
 Director



1. Introduction

- 1.1 In November 2015, Mid and East Antrim Borough Council commissioned SQW Ltd. to develop **Amplify**, a new and fresh Integrated Economic Development Strategy for the area. This document sets out **Amplify's** Strategic Framework, which is intended to catalyse and guide the work of all stakeholders as they strive to improve the prospects of the area's people, businesses, and communities.
- 1.2 Based in evidence and on extensive partner consultation, this Strategic Framework has been prepared to support the development of Mid and East Antrim through to 2030. It is not a set of rules or regulations, but rather a route map on how we want to manage our economy between now and then. The Framework has been developed during a time of significant economic and political change. There has been major restructuring in the local manufacturing sector with the closures of JTI Gallaher and Michelin which will result in over 2,000 jobs being lost in the local economy. These were high value jobs and it is estimated that between 4,700 and 6,600 replacement jobs will be needed in Mid and East Antrim. Over the last year there has also been the election of the new Northern Ireland Assembly in May 2016 and the EU Referendum in June 2016 which will result in the UK leaving the EU at some future point.
- 1.3 So, Mid and East Antrim is at a crossroads. In this fast-changing context, this Framework seeks to provide innovation, certainty, and stability in the things we will do to develop our economy, for the benefit of our people, businesses, and communities. At the same time, it has been designed with flexibility at its core, so allowing us to act dynamically and assertively in the face of those new challenges that will emerge for our economy, and through policy, over the coming years. Through **Amplify** we are announcing that Mid and East Antrim is open for business and that all partners are committed to working closely with our businesses and communities to ensure the growth and prosperity of the Borough.
- 1.4 The Framework focuses on what needs to be done in order to make Mid and East Antrim prosper in the long term, as part of a wider Belfast City Region. As such, its aim is to define the key economic development priorities for our area and provide direction for other related strategies and plans such as the overarching Community Plan and the Tourism Strategy. Strategies for the other four priority sectors are also planned.
- 1.5 The Strategic Framework is the outcome of extensive consultation with representatives from the Borough's public, private and not-for-profit sectors, as well as Government departments and agencies, and other Northern Ireland based organisations. The inclusive consultation process has been central to the new Mid and East Antrim Community Plan. The process involved three stakeholder workshops, two Councillor workshops, three Community Planning events and a Business Survey. As an Integrated Economic Development Strategy, it will ensure a unified approach to economic development in the Borough and dovetail with the Programme for Government and Northern Ireland Economic Strategy.
- 1.6 An Action Plan, setting out those activities which we will go forward with to move **Amplify** from concept to operating reality has been prepared as a separate companion document; both this framework document and the action plan have been written to be read in conjunction with one another. If you would like to know more about **Amplify**, how you can engage with it, or to access the wider evidential resources that have been used to assemble this Strategic Framework and its Action Plan, then please contact:



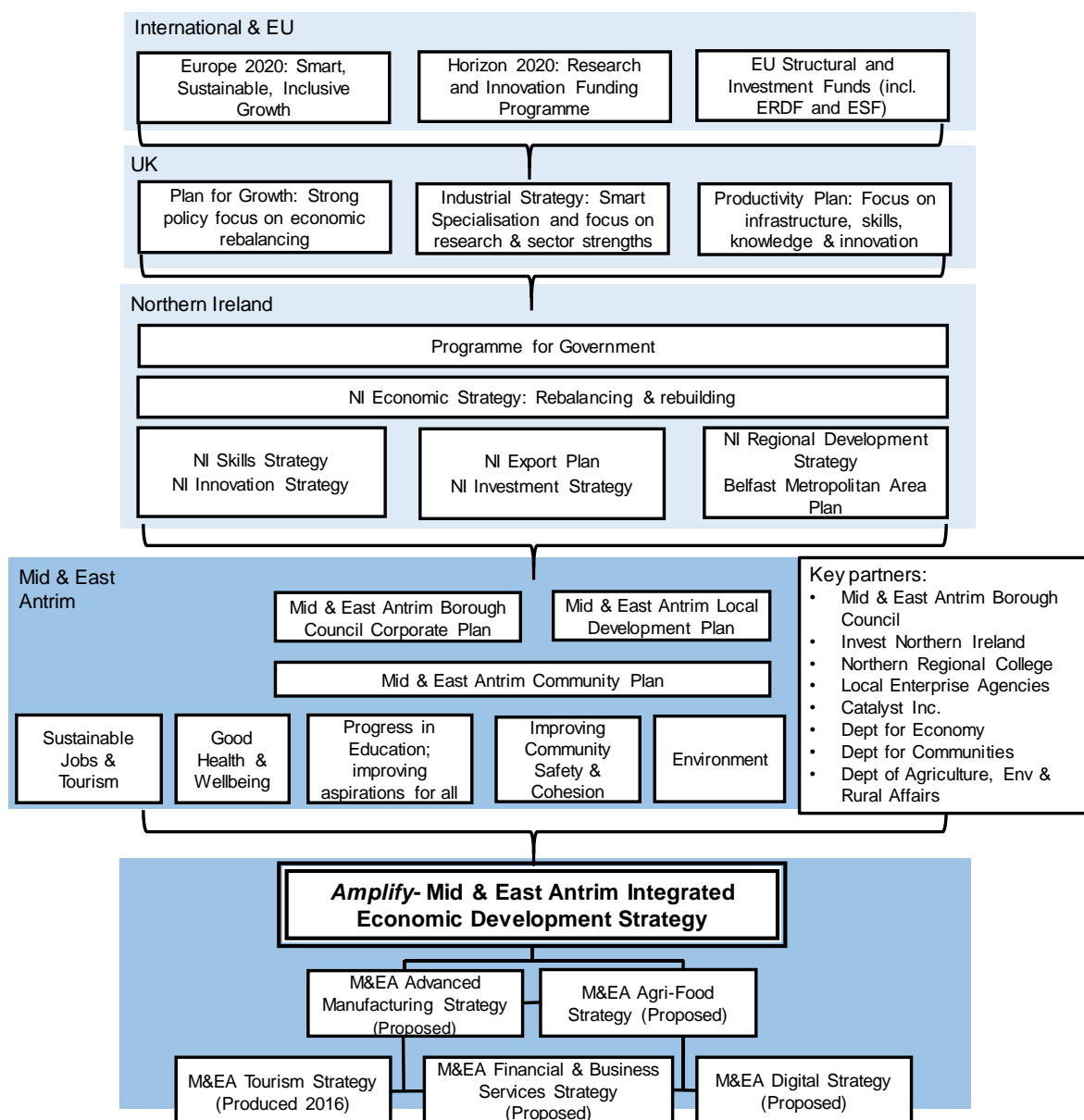
Linda Williams
Director of Economic Growth, Tourism and Regeneration
Mid and East Antrim Borough Council
Linda.Williams@midandeastantrim.gov.uk



2. The Strategic Context

2.1 Mid and East Antrim’s economic regeneration cannot be progressed in splendid isolation. Rather, **Amplify** must be a coherent and progressive framework in step with the strategies and activities of other partners at international, national, regional, and local levels. Understanding the strategic positioning of **Amplify** relative to existing thinking, is summarised in Figure 2-1. The management and implementation of **Amplify** is dependent on a number of key local partners who are responsible for the majority of the economic development support in the Borough, and are also listed in the graphic. Fuller detail on the relevant Northern Ireland strategies is provided in Annex A.

Figure 2-1: **Amplify - Ensuring Strategic Fit**^{1,2}



¹ Following the referendum vote in June 2016 and the UK’s expected exit from the European Union, the main EU strategies may become less relevant for the UK. However, in the short term the UK will continue to be a member of the EU

² A new M&EA Tourism Strategy has been produced and partners plan to commission sector strategies for the other four priority sectors over the next 12 months



The International, European, and UK policy environments

The International Economic Policy Environment

- 2.2 Trade and other economic processes are increasingly operating at the international scale. The emergence of China, India and other developing nations increasingly puts pressure on established economies, such as the United Kingdom and Northern Ireland, as global competition sees these new economies providing lower cost alternative locations.

The European Policy Environment

- 2.3 In June 2016, the UK voted to leave the European Union. At the time of writing, the new UK Prime Minister had just been appointed and is expected to announce formally the UK's exit from the EU which will trigger the start of negotiations between the UK Government and the EU on a range of issues. The timescales for announcing the UK's exit and how long the negotiations will take are uncertain and the process could last a number of years. Issues such as EU funding and new trade and immigration relationships are likely to be complex and time-consuming to resolve.
- 2.4 It is impossible to know the implications for Northern Ireland of the UK's exit, and much will depend on the new relationships that are put in place, especially given that the Republic of Ireland will continue to be part of the EU. For the short-term, at least, the UK will continue to be a member of the EU and there are a range of economic development policies from Europe that provide important context for **Amplify**.
- 2.5 **Europe 2020** is the European Union's ten-year economic growth strategy aimed at recovery and growth following the global economic recession. It includes objectives on employment, innovation, education, social inclusion and climate/energy and has three mutually reinforcing priorities for growth:
- Smart Growth: developing an economy based on knowledge and innovation.
 - Sustainable Growth: promoting a more resource efficient and more competitive economy
 - Inclusive Growth: fostering a high-employment economy delivering social and territorial cohesion.
- 2.6 **Horizon 2020**, launched in 2014, is the main financial instrument for supporting research and innovation across Europe. The **EU Structural and Investment Funds** (a range of funds including ERDF and ESF) are also key to delivering the aims of Europe 2020 by supporting regional economic and skills development. Northern Ireland and the Mid and East Antrim area have benefited from some of these funding sources. How long such funding will continue will be subject to the negotiations on the UK's withdrawal from the EU.
- 2.7 A key strand of European economic development thinking is **Smart Specialisation**. This emphasises the need for mature Western economies to compete on their differentiated areas of excellence, not simply trying to ape what can be done more cheaply in economies elsewhere. Smart Specialisation is about encouraging economies to compete on the basis of content and innovation, rather than cost and price alone. Each part of the UK, including Northern Ireland, has developed its own Smart Specialisation Framework. Thinking in Smart Specialisation terms has been a key emphasis for developing **Amplify**.



The UK Policy Environment

- 2.8 Since the election of the Coalition Government in 2010, there has been a strong policy focus on economic rebalancing. In 2011, this resulted in the **Plan for Growth**, which aimed to achieve strong, sustainable and balanced growth across the UK regions and between industries (i.e. with less dependency on London and the South East of England).
- 2.9 In 2014, the UK Government published its **Industrial Strategy** prioritising investment in technologies where the UK has the research expertise and business capability to become world-leading. Areas include: Big Data, Space, Robotics and Autonomous Systems, Synthetic Biology, Regenerative Medicine, Agri-Science, Advanced Materials, and Energy. In addition, 11 Priority Sectors were identified: Aerospace, Agri-Tech, Automotive, Construction, Information Economy, International Education, Life Sciences, Nuclear, Offshore Wind, Oil/Gas, and Professional and Business Services. As we will go on to discuss, Mid and East Antrim has significant business capabilities in some of these growth areas. The UK Government will be further developing its approach to industrial policy through the recently re-named Department for Business, Energy and Industrial Strategy.
- 2.10 As the UK economy has returned slowly to growth, policy-makers have started to focus on the issue of productivity. In 2015, the UK Government published its **Productivity Plan** which highlighted a large productivity gap between the UK and leading advanced economies. The Government's Plan was to raise productivity by: encouraging long-term investment in economic capital, including infrastructure, skills and knowledge; and promoting a dynamic economy that encourages innovation and helps resources flow to their most productive use. Productivity is key to economic success and is a central theme of **Amplify**.
- 2.11 At the time of writing, the new UK Prime Minister had just been appointed following the vote to leave the EU. Any changes to the UK Government's economic and industrial policy will become apparent over the coming months.

Northern Ireland level policies and developments

- 2.12 The latest **Programme for Government** (2011-15) had the economy as its central theme, '*the primary focus for the next four years will be to grow the economy and tackle disadvantage*'. A Draft Framework for the new Programme for Government was published for consultation following Northern Ireland's Assembly May 2016 elections. It contains 14 outcomes and 48 indicators. The most relevant metrics in relation to the economy are presented below.

Table 2-1: Draft PfG Framework – economic-related objectives

PfG economic outcomes	PfG economic indicators
We prosper through a strong, competitive, regionally balanced economy	Private sector NICEI
We have a more equal society	External sales
We have an innovative, creative society where people fulfil their potential	Rate of innovation activity (% of companies engaging in innovation activity)
We have more people working in better jobs	Employment rate by council area
We have created a place where people want to live & work, to visit & invest	Employment rate of 16-64 year olds by deprivation quartile
	Economic activity rate excluding students
	% of school leavers achieving at least level 2 or above including English and Maths
	Proportion of the workforce in employment qualified to level 1 and above, level 2 and above, level 3 and above, level 4 and above



PfG economic outcomes	PfG economic indicators
	Seasonally adjusted employment rate (16-64)
	A Better Jobs Index
	Proportion of local graduates from local institutions in professional and management occupations or in further study six months after graduation
	Total spend by external visitors

- 2.13 As can be seen, the economy will continue to be a core objective in the Programme for Government, with emphases on economic participation, inclusion, productivity, innovation and competitiveness. The new Programme for Government will adopt a more explicit focus on achieving outcomes rather than realising activities and outputs as at present.
- 2.14 The **Northern Ireland Economic Strategy** (NIES), launched in 2012 to take forward the economic components of the Programme for Government, is a key reference point for **Amplify**. NIES states that *‘our economic vision for 2030 is an economy characterised by a sustainable and growing private sector, where a great number of firms compete in global markets and there is growing employment and prosperity for all’*. The two main themes and economic priorities are set out below.

Table 2-2: Northern Ireland Economic Strategy in summary

Priority 1: <i>rebalancing</i> the NI economy	Priority 2: <i>rebuilding</i> the NI economy
Stimulate innovation, R&D and creativity	Improve employment opportunities/employability
Improve employability and the level/relevance/use of skills	Promote employment through training and re-skilling
Compete in the global economy	
Encourage business growth	
Develop modern/sustainable economic infrastructure	

- 2.15 NIES also highlights the growth sectors of Telecommunications and ICT, Life and Health Sciences, Agri-Food, Advanced Materials, and Advanced Engineering. In the Service Sector, it notes the important role of Business and Financial Services. There is strong alignment between these sectors and our priority sectors for Mid and East Antrim.
- 2.16 After the new Programme for Government is finalised, the Northern Ireland Economic Strategy will be refreshed in early 2017. **Amplify** needs to have the flexibility to adapt to some of these changes and also ensure that it acts a vehicle for delivering activities and outputs which then lead to the desired outcomes in the Programme for Government. In this respect, **Amplify** will be integrated upwards with Programme for Government and the Northern Ireland Economic Strategy, along with the other main Northern Ireland strategies which are summarised in Annex A.

New Councils and devolved economic development powers

- 2.17 There were major changes in Northern Ireland’s local government landscape in 2015, with 11 new ‘super-councils’ replacing 26 former local authorities. Mid and East Antrim Borough Council is one of these new entities, formed through the merger of Ballymena, Larne and Carrickfergus Borough Councils.



- 2.18 As part of Local Government Reform, the new councils are assuming new powers in relation to planning, urban regeneration, community and economic development and tourism. Councils are also tasked with leading the Community Planning process, a mechanism for bringing together agencies and improving public service delivery locally.
- 2.19 The creation of the new Council coupled with the devolving of new responsibilities provide the Council and partners with an exciting opportunity to shape and drive the local economy. Mid and East Antrim aims to be the most 'pro-business' Council area of Northern Ireland.

Forthcoming changes to Corporation Tax

- 2.20 As part of the 2015 Stormont Agreement, the Northern Ireland Executive committed to implementing a 12.5 per cent rate of Corporation Tax from April 2018. The policy aim here is to help stimulate further growth in the private sector and help to rebalance the Northern Ireland economy. Productivity has been a long-standing issue in Northern Ireland (due in large part to demographics, its location and sectoral profile) and the changes aim to help firms grow and become more productive. The changes are also expected to attract additional inward investment projects. Recent research estimates that the lowering of Corporation Tax will generate tens of thousands could be created for the Northern Ireland economy by 2033³.
- 2.21 The implications for Northern Ireland of the UK Government's plans to lower UK Corporation Tax in attempt to boost investment following the 'Brexit' vote have still to be considered. It may be that there are now attempts to lower the Northern Ireland level even further to maintain the same differential with the rest of UK figure.

Local Level Strategies

- 2.22 Mid and East Antrim forms part of the wider Belfast City Region, with particularly strong links between Larne and Carrickfergus and Belfast City. The **Belfast Metropolitan Area Plan** sets out the spatial and planning priorities for the City Region. The Plan has a range of objectives around supporting the growth and regeneration of the towns and villages and providing the necessary transport infrastructure, housing and commercial development zones to support the region's growth.
- 2.23 2015's **Mid and East Antrim Borough Council Corporate Plan** has the vision of '*working together to create a better future for all*'. The Plan has five integrated strategic priorities to deliver this vision: Growing the Economy, Developing our Tourism Potential, Building Stronger, Safe and Healthy Communities, Delivering Excellent Services; and Developing a High Performing Council.
- 2.24 Under the Economy Priority, the Plan commits the Council to:
- Attract jobs and investment to the Mid and East Antrim Area through an innovative and dynamic approach to economic development and regeneration
 - Build strong and effective integrated partnerships to address issues of identified economic need
 - Use our planning responsibilities to maximise impact on economic development

³ Ulster University (2016), Measuring the economic impact of a reduced rate of Corporation Tax in Northern Ireland – this analysis is being updated following the Brexit vote in June 2016



- Maximise investment through effective lobbying of central government and private investors
- Identify and secure funding from European Union, and other sources, to deliver sustainable economic development and regeneration projects.

2.25 The **Mid and East Antrim Community Plan** is currently being developed. The Baseline Report from 2015 highlighted the proposed key themes for the Plan: Sustainable Jobs and Tourism; Good Health and Wellbeing; Progress in Education – improving aspirations for all; Improving Community Safety and Cohesion; and Environment. The **Local Development Plan** is also in development, and will set out the nature and scale of physical development required in future, and where capacity should be located. **Amplify** is therefore complementary to the emerging Community Plan and Local Development Plan for Mid and East Antrim. It will also provide the framework for strategies for the five key sectors of advanced manufacturing, agri-food, tourism, financial and business services and digital. A new M&EA Tourism Strategy has been produced and partners plan to commission strategies for the other four priority sectors over the next 12 months.

Major manufacturing job losses

2.26 The Mid and East Antrim area has been traditionally one of Northern Ireland's manufacturing heartlands. However, the area has recently received major set-backs with two of its largest employers announcing they are to close over the next couple of years⁴. Research commissioned by the Mid and East Antrim Manufacturing Task Force has found that the two closures will result in over 2,000 jobs being lost in the local economy and the loss of between £194 million and £274 million in Gross Value Added (GVA). This represents between nine and 13 per cent of total GVA output. These were high value jobs and it is estimated that between 4,700 and 6,600 replacement jobs will be needed in Mid and East Antrim.

2.27 Major restructuring and job losses in the local manufacturing sector have reinforced the need for an ambitious new integrated economic development strategy, **Amplify** to help the area diversify and rebalance from these economic shocks. Through this Strategy, there needs to be a radically different approach taken to supporting economic development in the Borough. All Strategy partners, including those that sit on the Mid and East Antrim Manufacturing Task Force, need to think creatively about potential transformational projects, and some of these ideas have already been included in the Action Plan. The scale of recent upheaval in the local economy means that partners need to bring in significant amounts of external expertise and investment to help the Borough recover and return to a growth trajectory.

Wider Market and Technology Change

2.28 Alongside policy, much market and technology change is underway; indeed, policy often is brought forward in response to such change. Table 2-3 summarises some of these in headline terms. Whilst all economies will be influenced and affected by these changes, **Amplify** is about making sure Mid and East Antrim is not knocked off course by these changes.

⁴ Ballymena-based JTI Gallaher announced in late 2014 that it will be closing its factory by 2017. A year later Michelin, also based in Ballymena, announced it will be closing by 2018.



Table 2-3: Drivers of Market and Technology Change

Driver of Change	Key Issues
Demographics	<ul style="list-style-type: none"> Increasingly ageing populations in the western economies, with increasing calls for age-related drugs and medical devices to address mental and physical wear-and-tear. Addressing these issues will represent a major opportunity for those manufacturers and their supply chains operating in the life science sectors Increasing demand for products and services from new, large, and demanding markets of increasingly affluent consumers in emerging markets, such as China and India Ageing and on-going migration are likely to create skill shortages across Europe. More specifically, the availability of engineering and other scientific and technological skills in Europe is likely to constrain the future growth of design and production capabilities in Europe, especially so in new and growing sectors with specialised skills (such as new materials, photonics, and biotechnology).
Market responsiveness	<ul style="list-style-type: none"> Markets are increasingly competitive and changeable. Customer demand can change from day to day and supply chains, logistics systems, and manufacturing capabilities need to be flexible and responsive to fast changes in customer demand
New/growth areas of manufacturing	<ul style="list-style-type: none"> Without doubt, ICTs will lead to a decline in some traditional manufactured products and processes, However, there are opportunities to focus on higher value added advanced manufacturing and some growth areas such as photonics and renewable energy. These are areas where there is a requirement for multi-disciplinary skills and are areas where European countries have a good opportunity to compete
Environmental & eco/zero emissions manufacturing	<ul style="list-style-type: none"> From market and consumer perspectives, the future of manufacturing is likely to be required to be increasingly environmentally friendly in terms of minimising emissions, improving resource efficiency and reducing energy consumption. This may involve processes that improve energy recovery, minimise greenhouse gas emissions and include greater use of environmentally neutral materials. The development of technologies for recycling and recovery of materials from waste, as well as the recycling and re-use of end-of-life products are likely to be key issues. Added to this, increasingly manufacturers are taking greater responsibility for the 'whole-life' aspects of their products

And some wider key uncertainties?

Ongoing economic uncertainty . . .

- 2.29 The EU referendum result will have major implications for the UK economy. The uncertainty following the 'Brexit' vote has already had some impact on the financial markets, the value of Sterling and exchange rates with potential impacts on exports and inward investment. The longer term net impacts (be these positive and negative) remain to be seen but, for the moment, the decision to leave the EU has created economic and political upheaval.
- 2.30 More widely, issues such as the slowdown in the Chinese economy, the price of oil and commodities all impact on global markets which then impact on the costs of inputs, availability of labour, and demand for products and services in domestic and export markets.



... and continuing public sector austerity

- 2.31 Northern Ireland has a larger public sector than other parts of the UK and up until now has managed to largely resist UK Government imposed austerity measures. That is now beginning to change with the recent restructuring of Northern Ireland Assembly departments and the need to reduce public sector by around 20,000 jobs (10 per cent) over the next three to four years. Although clearly challenging, reductions in public sector funding should help to encourage more innovative thinking and pooling of resources at the local level. The new UK Prime Minister's plans regarding austerity will become clearer in the coming weeks and months, but the need to balance the books is unlikely to go away.



3. Situating Mid and East Antrim

- 3.1 All good strategy understands where it starts from. Accordingly, the development of **Amplify** has drawn heavily on data produced by the Northern Ireland Statistics and Research Agency, and the wider UK Office of National Statistics with a view to characterising how the areas is performing. In this Section, and reflecting the imperative for a productive and competitive economy, we present these data through five key economic lenses - *Enterprise, Skills, Innovation, Investment, and Inclusion* - all of which operate as drivers of productivity. This section summarises the main data - a more detailed data analysis is at Annex D.

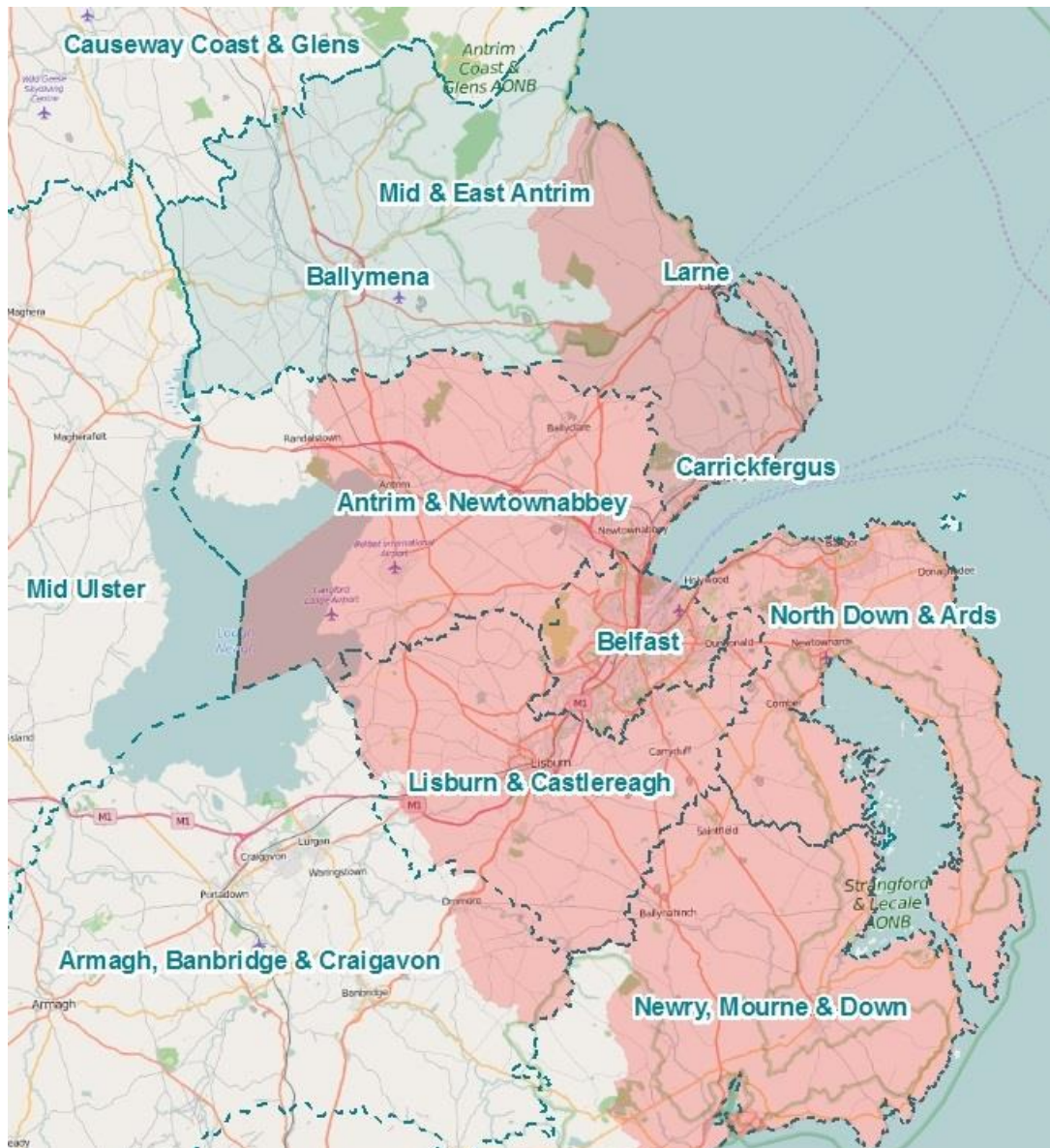
To begin with, the Vital Statistics

Population and Location

- 3.2 Overall, the Borough has a population of around 137,000, which is seven per cent of Northern Ireland. Its three main towns are Ballymena (30,000 residents), Carrickfergus (28,000) and Larne (19,000), which has a port with passenger and freight connections to Scotland.
- 3.3 In terms of population, the area is the third smallest of the 11 new 'Super-Councils'. Since 2001, the Mid and East Antrim population has increased by seven per cent, largely driven by an increase of 11 per cent in the former Ballymena Borough Council area.
- 3.4 The area is located close to Belfast, with Carrickfergus forming part of the wider Belfast Metropolitan Area. This is significant as Belfast is the main driver of the Northern Ireland economy, with the city region accounting for a third of Northern Ireland's population. Mid and East Antrim is therefore in close proximity to two airports (Belfast International and Belfast City Airports) and Belfast Harbour. Overall, the area is generally well-served by transport links with good road and rail connections into Belfast. Recent upgrades to the A8 and A26 have helped to improve connectivity with the city. Mid and East Antrim's location and its quality of connectivity (road, rail, ports and airports) need to be exploited more effectively to attract people to live, work, visit and invest in the Borough.
- 3.5 The map below shows Mid and East Antrim's strategic location close to Belfast by overlaying the Belfast Travel to Work Area and Council boundaries. There are relatively high numbers of residents in the former Council areas of Carrickfergus and Larne that travel into Belfast each day for work. In the former Carrickfergus Borough Council area over a third of employed residents (5,300 people) work in Belfast as well as a fifth of employed residents (2,300) from the former Larne Borough Council area. With recent improvements to transport links, there are opportunities to assist more residents to find work in the city, as well as encouraging city workers to move to Mid and East Antrim.



Figure 3-1: Mid and East Antrim – spatial depiction and relationships



Source: SQW

Business Base

- 3.6 There are 4,500 businesses in the area which represents seven per cent of all businesses in Northern Ireland. Some of its key employers include Wrightbus, Moy Park and Ciga Healthcare (based in Ballymena), Caterpillar and Terumo (based in Larne), AES and Ryobi (based in Carrickfergus). Mid and East Antrim has existing sectoral strengths in Manufacturing, Engineering, and Agri-Food, with other key employers in the Energy Supply and Life Sciences sectors. The table below presents some key figures on the local economy.



Table 3-1: Mid and East Antrim Economy Headline Statistics

Indicator	M&EA	NI	UK
Population (2014)	137k	1.84m	64.6m
Working age population (2014) (%)	82k (60%)	1.12m (61%)	39.24m (61%)
Gross Value Added – £m, 2013 (CE figures)	2,002	31,828	1,473,845
GVA per filled job aka Productivity – £k, 2013 (CE figures)	39.9	39.0	46.0
Employment – residence based (2013)	65k	805k	28.5
Employment – workplace based 2013 (CE figures – incl self-employed)	50k	817k	32.0m
Active enterprises (2014)	4,500	67,710	2,263,650

Employment by Sector

- 3.7 The manufacturing sector is a key driver of the Mid and East Antrim economy, accounting for around 10,000 jobs (one in five local jobs) with double the level of employment compared to Northern Ireland and three times the UK average. Clearly, the official manufacturing statistics will soon change following the JTI and Michelin redundancies taking place over the next two years. 'Wholesale and Retail Trade' is another significant employer with 9,000 jobs, again at a higher level than both Northern Ireland and the UK. Mid and East Antrim has a lower concentration of jobs in high value sectors such as 'Information & Communication', 'Finance & Insurance' and 'Professional, Scientific & Technical' services relative to NI and the UK. The most relevant SIC codes to *Amplify's* five priority sectors (advanced manufacturing; agri-food; tourism; financial and business services; and digital) are highlighted in the table below.

Table 3-2: Mid and East Antrim Workforce – by Sector

Sector	Number	% of workforce	LQ (NI)	LQ (UK)
Agriculture, Forestry & Fishing	2,875	6	1.2	4.9
Manufacturing	10,408	21	1.9	2.6
Energy Supply	323	1	4.8	1.6
Water Supply	126	0	0.3	0.4
Construction	2,878	6	1.0	0.9
Wholesale & Retail Trade	9,038	18	1.1	1.2
Transportation & Storage	2,123	4	1.2	0.9
Accommodation & Food	3,156	6	1.1	1.0
Information & Communication	344	1	0.3	0.2
Finance & Insurance	693	1	0.6	0.4
Real Estate	174	0	0.5	0.2
Professional, Scientific & Technical	1,126	2	0.6	0.3
Admin & Support Services	2,029	4	0.7	0.5
Public Admin & Defence	2,606	5	0.7	1.1
Education	4,288	9	1.0	1.0
Health & Social Work	5,754	11	0.7	0.9
Arts & Entertainment	922	2	0.9	0.6
Other Services	1,381	3	1.1	1.0
Total	50,243	100	816,901	



Headline Economic Performance

Over the last 20 years, Mid and East Antrim economy has grown faster than the UK & NI

- 3.8 Mid and East Antrim's economy is currently worth around £2 billion in GVA (Gross Value Added) and has performed well in recent years, experiencing faster annual growth relative to the rest of NI and the UK. Between 1990 and 2013, GVA output in the local economy grew by an average of 2.4 per cent p.a., compared to growth of 2.2 per cent in Northern Ireland and 2 per cent in the UK. Over the same period, local employment levels also grew faster than the UK as a whole (0.8 per cent compared to 0.4 per cent pa). In 2013, a quarter of total output in the local economy was attributable to the manufacturing sector – more than triple the equivalent share of 8 per cent for the UK and much higher than 13% in Northern Ireland.

Productivity has improved over the last decade . . . but a gap still remains

- 3.9 Over the last decade, Mid and East Antrim has made significant progress in improving the productivity of its workforce. In 2002, productivity in Mid and East Antrim was 81% of the UK average (£33,700 compared to £41,500 in the UK, and £34,900 across Northern Ireland). By 2013, local productivity had improved to 87% of the UK average (£39,900 set against a UK figure of £46,000, and £39,000 in Northern Ireland). Even given the recent closure announcements, the projections from Cambridge Econometrics (CE) suggest that Mid and East Antrim will continue to have a high proportion of production jobs which usually generate higher levels of productivity.

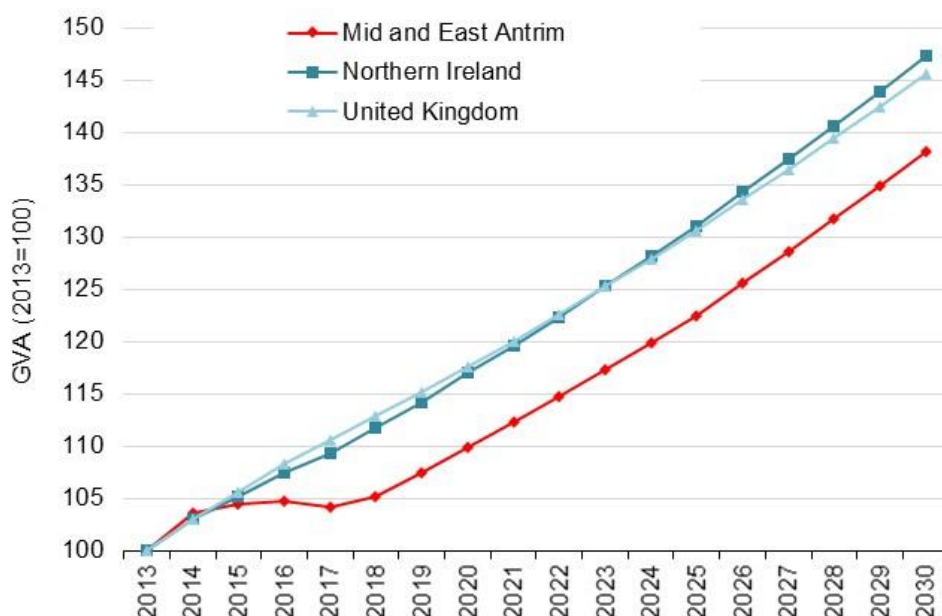
. . . and continued growth is predicted for the economy up to 2030, but it will be largely 'job-less' growth

- 3.10 The Mid and East Antrim economy is in transition following the closure announcements at manufacturers JTI Gallaher and Michelin. Projections from CE to 2030 take account of these jobs losses, as well as the economic uplift anticipated from changes to Corporation Tax in 2018. Whilst these projections do not allow for other positive or negative interference effects other than at the top level, they do help pose some important questions and highlight areas of potential and exposure going forward.
- 3.11 Mid and East Antrim is projected to grow to a £2.8 billion economy by 2030, increasing at annual rate of 1.9 per cent – below the equivalent annual growth rates for NI (2.3 per cent) and the UK (2.2 per cent). This increase in GVA will therefore largely be driven by productivity improvements, with Mid and East Antrim forecast to close the productivity gap to 92% of the UK average. By 2030, each worker is expected to be producing an average of £54,500 compared to £59,496 in the UK. Productivity in the local area is also expected to stay above that of NI (£52,405).
- 3.12 Although GVA is expected to grow in the coming years, this is largely expected to be job-less growth with a marginal net increase of one per cent predicted between 2013 and 2030. This is well below the forecast employment growth rate for the UK (12.6 per cent) and NI (9.5 per cent) during this period. Employment in Mid and East Antrim is not expected to return to 2010 levels until 2030. In both sets of projections, it is clear to see the period of suppressed growth due to the short term impact of the major redundancies. Although the 2013 GVA and employment figures are the latest actuals, the baseline position for this Strategy is clearly the situation in 2016. The CE projections (taking into account the major redundancies) suggest that in 2016 Mid and East Antrim's economy will be worth around £2.1 billion in GVA,



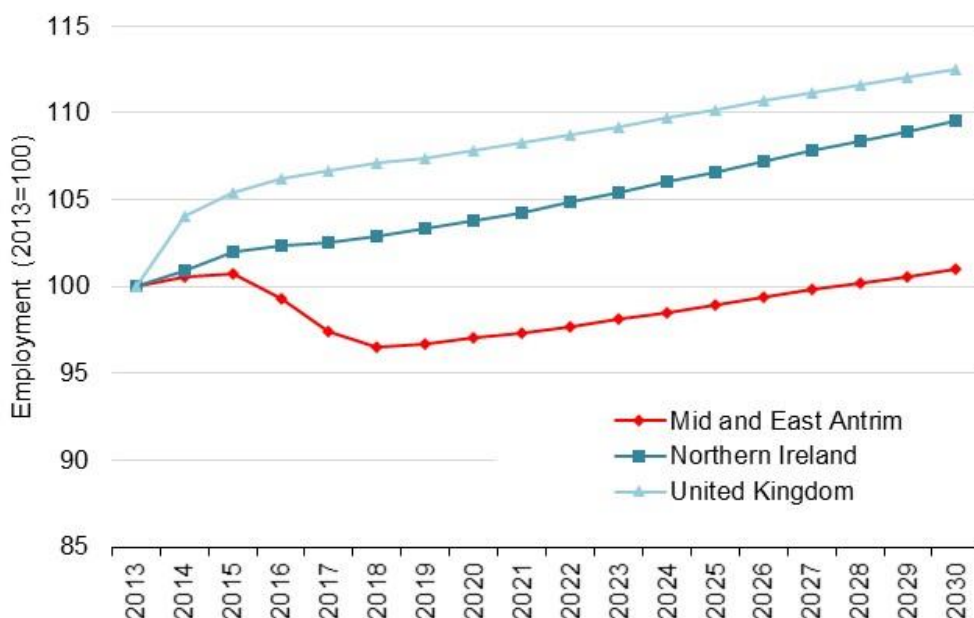
supporting 49,900 jobs. A full analysis of the long term GVA and employment trends is included in Section 3 of the Baseline Data Resource in Annex D.

Figure 3-2: Mid and East Antrim GVA Projections 2013-2030



Source: SQW analysis of CE projections

Figure 3-3: Mid and East Antrim Employment Projections 2013-2030



Source: SQW analysis of CE projections

There are some expanding sectors in the economy, accompanied by a small cohort of more productive industries

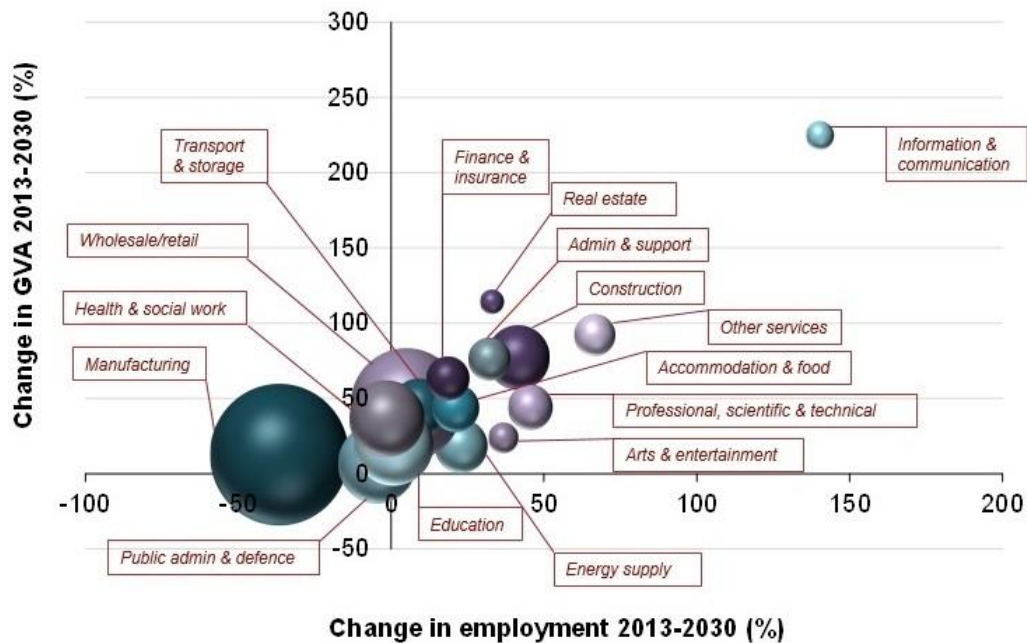
3.13 There are some positive signs for Mid and East Antrim economy, with a good number of high value ‘expanding sectors’. Expanding sectors are defined as those industries which will experience growth in both GVA and employment. Examples include ‘Finance and Insurance’, and ‘Professional, Scientific and Technical’ industries. The most significant sector expected to



expand is 'Information and Communication' – with an increase in GVA of over 200 per cent and an increase in employment of over 100 per cent. Although these sectors are currently quite small in terms of GVA output, the new Strategic Framework includes Financial and Business Services and Digital as emerging priority sectors.

- 3.14 Adjusting sectors refer to those industries where an increase in GVA and decrease in employment is expected. This translates to productivity improvements being realised in these industries. Mid and East Antrim has a small cohort of adjusting sectors, such as 'Real Estate', 'Public Administration', and 'Health and Social Work'. Manufacturing is another adjusting sector following the announcement of job cuts at JTI and Michelin. To minimise the overall impact of these job losses, it is important that the benefits of increased productivity in this sector are maximised. 'Agriculture, forestry and fishing' is the only industry in the Mid and East Antrim economy which is considered a shrinking sector. In the years leading up to 2030, this sector is expected to experience a fall in both GVA and employment. Figure 3-4 shows the current size of local sectors as measured by GVA (the size of the bubble) together with projected growth rates for GVA and employment up to 2030.

Figure 3-4: Projected Sector Shapes, 2013-2030



Source: SQW analysis of CE projections. Note: The size of the bubble represents GVA (£m) in 2013.

Lense 1: Enterprise

Mid and East Antrim needs more start-ups and growing SMEs

- 3.15 Mid and East Antrim has seen a reduction in its business base in recent years, falling by four per cent over the last decade. In 2015, Mid and East Antrim had 552 businesses per 10,000 working age population, which was lower than the equivalent figures for both Northern Ireland (604) and the UK (609).
- 3.16 To prevent this gap from widening, encouraging enterprise and increasing business registration rates must be a key priority of **Amplify**. In Mid and East Antrim, there were just 35 new registrations per 10,000 working age population in 2014 compared to 43 in Northern Ireland and 89 in the UK. Increasing registrations will require targeted action to create a new



culture of enterprise within the local economy and education system, accompanied by the necessary support needed to nurture new ventures.

Like other parts of Northern Ireland, broader entrepreneurship activity is low

- 3.17 According to the Global Entrepreneurship Monitor, 8.2 per cent of the UK's working age population has been involved in early stage entrepreneurship activity. Over the last decade, the average figure for Mid and East Antrim was 5.2 per cent, just higher than the average for Northern Ireland of 5.1 per cent during this period. The highest levels of entrepreneurship activity have been in Mid Ulster (6.6 per cent), Fermanagh and Omagh (5.8 per cent), and Armagh, Banbridge and Craigavon (5.8 per cent). More analysis of the Enterprise data can be found in Section 4 of the Baseline Data Resource in Annex D.

Lense 2: Innovation

Mid and East Antrim needs to do more to encourage and nurture business innovation

- 3.18 The industrial structure of Mid and East Antrim presents a number of economic challenges, with a high proportion of enterprises in relatively low-value sectors. For example, in 2014, 30 per cent of all active enterprises were based in agriculture – higher than the equivalent rates of 25 per cent for NI and six per cent for the UK. The area also has fewer businesses involved in knowledge-based activity with just six per cent of all enterprises involved in professional, scientific or technical industries, well below the UK average of 17 per cent (in Northern Ireland the figure was seven per cent). This evidence suggests there is a need for Mid and East Antrim to support more high value and technology rich start-ups, perhaps as part of the manufacturing supply chain.
- 3.19 Typically, Business Enterprise R&D (BERD) spend data and Patents would be used to measure innovation activity in an area. These data are unfortunately not available for Mid and East Antrim. More analysis of the Innovation data can be found in Section 5 of the Baseline Data Resource in Annex D.

Lense 3: Skills

Labour market participation in M&EA is higher than NI as a whole but a gap remains with the UK

- 3.20 The local population in Mid and East Antrim is well engaged in the labour market, with slightly higher employment and activity rates compared to NI as a whole. In 2014, the economic activity rate for M&EA was 74 per cent – above the equivalent rate of 73 per cent for Northern Ireland but below that of the UK (77 per cent). Similarly, the employment rate in M&EA (69 per cent) in 2014 was higher than the equivalent rate for Northern Ireland (68 per cent) but below that of the UK (72 per cent).
- 3.21 The number of Jobseekers Allowance (JSA) claimants in M&EA has increased in recent years. Between 2008 and 2015, the number of JSA claimants in the area has nearly doubled – increasing from 1,300 to over 2,500. Whilst the proportion of the working age population in M&EA claiming JSA benefit is lower than for Northern Ireland, it remains higher than the equivalent rate for the UK. A further increase in local unemployment rates is likely when JTI Gallaher and Michelin close their operations.



Mid and East Antrim has a skilled and motivated workforce, but with potential to increase higher level skills

- 3.22 Mid and East Antrim performs relatively well in terms of the proportion of working age population with no qualifications. The latest (2014) data show that 10 per cent of M&EA's working age population have no qualifications, broadly in line with the UK (nine per cent) and less than in Northern Ireland (17 per cent). Maintaining and reducing this proportion further will contribute significantly to the development of a higher skilled economy, helping to attract quality and well paid jobs to the area.
- 3.23 At the opposite end of the scale, 24 per cent of Mid and East Antrim's working age population has an NVQ Level 4 or above qualification compared to 30 per cent in Northern Ireland and 36 per cent in the UK. This means that the vast majority of M&EA's working age population has qualifications below NVQ Level 4, in large part reflecting the low levels of knowledge economy jobs.
- 3.24 Workers in M&EA received a higher average weekly wage in 2015 relative to NI as a whole, again influenced by the area's relatively strong manufacturing sector. In 2015, the gross average weekly salary in Mid and East Antrim was £446 compared to a Northern Ireland figure of £443 and UK average of £508. More analysis of the Innovation data can be found in Section 6 of the Baseline Data Resource in Annex D.

Lense 4: Investment

Mid and East Antrim has strong economic links to wider functional economic areas, supported by good transport infrastructure

- 3.25 Mid and East Antrim is a diverse area with a complex mix of urban and rural places and, importantly, different linkages to wider functional economic areas. The former Larne and Carrickfergus Borough areas have strong linkages and major outflows of resident workers to Belfast as the regional economic centre. According to Census 2011 Travel to Work Data, there are far more employed residents than jobs in Carrickfergus and Larne. In contrast, the former Ballymena area is much more self-contained with the majority of employed residents working in the area. Ballymena also attracts a significant number of workers itself, mainly from Ballymoney and Antrim.
- 3.26 As highlighted earlier this strategic location of Mid and East Antrim is supported by good transport infrastructure, facilitating travel to and from surrounding areas. In addition to regular hourly rail links from all three towns into Belfast, Mid and East Antrim benefits from close proximity to both ports (Larne & Belfast) and airports (Belfast International & George Best Belfast City). Recent upgrades to the A8 and A2 have helped to improve road travel between the local area and Belfast.

Average house prices in Ballymena are much lower than Belfast and NI, positioning the area as an attractive place to live

- 3.27 In 2015, the average house price in 'Antrim and Ballymena' was £125k and 'East Antrim' was £140k – in both cases lower than the equivalent figure of £149k in Belfast and £147k across the whole of Northern Ireland. This availability of housing at an attractive price helps position the area as a desirable place to live for those working in Belfast and surrounding areas, increasing the resident population and generating a new stream of spending in the local economy.



Mid and East Antrim has untapped tourism potential

- 3.28 Mid and East Antrim is blessed with a beautiful coastline and scenic countryside, accompanied by an array of parks and woodlands which are open to the public. The area also boasts a number of tourist attractions, including Carrickfergus Castle, the Causeway Coastal route and the Gobbins' Cliff and Coastal Path. Working with neighbouring council areas and Tourism Northern Ireland, much more needs to be done to exploit this untapped tourism potential through promotion, collaboration and further infrastructure improvements. Tourism is one of the Strategic Framework's priority sectors and a separate Tourism Strategy has been developed for Mid and East Antrim.

The availability of superfast broadband in Mid and East Antrim is mixed, with issues remaining in more rural areas of the region

- 3.29 In 2014, 86 per cent of premises in Carrickfergus had access to superfast broadband. This was higher than the equivalent rates for NI (77 per cent) and the UK (75 per cent). However, superfast provision was considerably lower in other areas of Mid and East Antrim, with 63 per cent of premises in Larne and 62 per cent of premises in Ballymena able to access high speed connections. With a lack of availability continuing to persist in rural areas, there is a need to accelerate the Northern Ireland Broadband Improvement Project to address these issues and deliver a more level playing field throughout Mid and East Antrim. With high speed broadband recognised as a key driver of productivity, there are also opportunities to maximise the infrastructure that is already in place by providing additional broadband support to businesses.

Availability of employment land . . . but a lack of business accommodation

- 3.30 There are areas of employment and industrial land available for development in or around the Borough's three main towns. With over 300 hectares of zoned land, less than 50% is currently developed. Most availability is to be found at Woodside Road in Ballymena, Troopers Lane and Kilroot in the Carrickfergus area and Larne Harbour and Drumahoe in Larne. There will also shortly be the vacated sites currently occupied by JTI Gallaher and Michelin.
- 3.31 Some larger businesses looking to invest in the Borough may be in a position to develop some of these sites, but other smaller firms will be looking for existing business accommodation. A lot of the existing accommodation for small businesses is managed by the three Enterprise Agencies.
- 3.32 Ballymena Business Centre has over 100 units and around 100,000 sq.ft of workspace and office space across five sites around Ballymena. Only five units are currently available. Carrickfergus Enterprise has over 50,000 sq. ft of workshops and office space and is 80-90% occupied. LEDCOM has around 100,000 sq. ft of workspace across its Willowbank Business Park with 70% occupancy rates and LEDCOM Industrial Estate with 80% occupancy.

New business accommodation is also being developed at the Ecos Centre in Ballymena. Around 20,000 sq.ft of workspace will be available by late 2016. The facility will provide 'science park-styled' shared and private workspaces with meeting space and business support. Even with this development, stakeholder feedback indicated that more space for both start-ups and established firms is required. Assessing the wider picture on business property vacancy rates in Mid and East Antrim is difficult due to lack of data.



The ongoing need to regenerate town and villages

- 3.33 Ballymena and Larne are currently benefiting from Council investments in their public realm infrastructure and improvements were also recently made to Carrickfergus town centre. However, with a struggling retail sector and limited night-life offering, there remains significant work to regenerate all towns and villages across Mid and East Antrim.
- 3.34 Although Northern Ireland has seen some improvements in the last year or so in retail vacancy rates (down from 17 to 15 per cent), comparable data for Ballymena and Larne show slightly higher vacancy rates.
- 3.35 One important recent initiative was the creation of Northern Ireland's first Business Improvement District (BID) in Ballymena. This business-led programme will invest up to £1.5 million over the next five years in promoting and regenerating Ballymena's town centre. More analysis of the investment data can be found in Section 7 of the Baseline Data Resource at Annex D.
- 3.36 Investment in the Borough's rural settlements will also be important to improve the opportunities for local residents but also in terms of strengthening the tourism potential of the area. The rural landscape is a major draw for visitors to Mid and East Antrim and therefore the facilities and infrastructure need to be in place to maximise the economic impact of tourism.

Lense 5: Inclusion

Economic inactivity in Mid and East Antrim is lower than for NI as a whole, but there has been an increase in the number of people claiming benefits

- 3.37 In 2014, the economic inactivity rate in Mid and East Antrim was 27 per cent – below the equivalent rate of 28 per cent for NI but above that of the UK (23 per cent). Despite this, there has been an increase in the number of people claiming at least one type of benefit in recent years. Benefit claimants in the local area rose from 12,400 in 2008 to over 15,000 in 2014 – an increase of 21 per cent. As a result, the claimant rate in Mid and East Antrim (18 per cent) is now higher than that of the UK (12 per cent).

Deprivation in Mid and East Antrim is below NI levels but pockets still remain in various communities and estates

- 3.38 According to the NI Multiple Deprivation Measure 2010, Mid and East Antrim performs relatively well in terms of deprivation. Around 19 per cent of the local population are considered income deprived – well below the equivalent rate of 25 per cent for NI. Similarly, the proportion of the working age population in Mid and East Antrim which is considered employment deprived is lower than NI as whole (11 per cent relative to 13 per cent). Despite this strong performance, pockets of deprivation still remain in certain communities and estates throughout Mid and East Antrim. Although there is already good support being provided by a range of social enterprises, these communities need more intensive support so that they are better equipped to contribute to, and benefit from future economic growth in the local economy and the surrounding areas. More analysis of the Inclusion data can be found in Section 8 of the Baseline Data Resource in Annex D.



Towards an integrated SWOT Analysis

- 3.39 What, then, in the light of the commentary above is the overall assessment of Mid and East Antrim's economic position? Table 3-3 brings these together in the form of a Strengths, Weaknesses, Opportunities, and Threats summary.



Table 3-3: Mid and East Antrim SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Sectoral strengths in Manufacturing, Engineering, Agri-Food & a resilient rural/farming sector • Strong recent performance of high profile employers (e.g. Wrightbus, Michelin, JTI Gallaher, Moy Park, Caterpillar) • Strong SME supply chain built up around key employers • Strong links between Northern Regional College & local employers. Some business links with universities, especially among larger employers • Recognised profile of Ballymena as a retail destination • Range of employment opportunities across different skill levels • Source of well-paid jobs, especially in manufacturing. Good-work ethic & a 'can do' attitude • Higher than average economic activity & employment rates • Strong economic links to wider functional economic areas & proximity to Belfast • Good transport infrastructure (recent upgrades of A8 & A2, rail links, airports, ports) • Key strategic employment sites based around the 3 main towns (e.g. Invest NI's sites at Trooperslane, Millbrook, & Woodside) • Beautiful coastline & scenic countryside, contributing to a high quality of life • Numerous tourism assets (e.g. Carrickfergus Castle, Gobbins, Causeway Coastal route) 	<ul style="list-style-type: none"> • Recent major redundancies in the manufacturing sector & a loss of confidence • Strong reliance on a handful of large employers • Access to markets problematic with high energy & regulation costs • Limited representation in the 'emerging' sectors (e.g. ICT) • Struggling retail sector with threat from online & city retail offer • Relatively low enterprise rates • No university campus based locally • Limited graduate level positions available • Small number of knowledge driven businesses • Limited number of recent FDI projects • Skills levels fairly low overall (not enough workers with NVQ Level 3 or Level 4) • Complacency within school leavers about leaving school & getting a local manufacturing job • Limited awareness of M&EA as a destination & what it offers • Declining urban centres • Limited broadband availability in rural areas • Recent increase in benefit claimants • Pockets of deprivation remain in some locations & estates
Opportunities	Threats
<ul style="list-style-type: none"> • New Council & new responsibilities for local economic development, planning, community planning & General Power of Competence • Develop local economic capacity & capability • Ensure the area is an attractive place to live, work, invest & visit • Ensure the area is the most pro-business area of Northern Ireland • Support the development & growth of the SME supply chain • Encourage better export performance & engagement with existing innovation programmes • Encourage greater industry-university collaboration • Support start-up activity following redundancies • Potential for diversification of existing business base into growing sectors (e.g. aerospace, Life Sciences) • Potential to build FDI proposition to take advantage of Corporation Tax opportunities • Encourage more technology start-ups through the Ecos Centre • Develop a clearer understanding of smart specialisation • Improve understanding of links with key assets across the council border (e.g. CAFRE in Antrim) 	<ul style="list-style-type: none"> • Knock-on effects of major redundancies for suppliers & the local economy • Potential cuts to the public sector exacerbating the current situation. • The implications of 'Brexit' for the UK, Northern Ireland and Mid and East Antrim economies • The impact of further public sector job losses & benefit reforms on deprived communities • Down-sizing of manufacturing as activity continues to move east • Loss of skilled labour & R&D positions • Capacity & capability to diversify given long-standing sectoral strengths & lower than average start-up rate • Ageing population & growing pressure on the public sector, particularly around health & social care • Older workers struggling to move across into 'new sectors' • Becoming a commuter area for Belfast & therefore losing identity & vibrancy • Further loss of competitiveness of town centres with out-of-town locations • Physical & digital isolation • Concentrations of long-term unemployed



- Retain skills base from Michelin/JTI Gallaher & matching with demand in other related sectors
- Redevelopment of Michelin/JTI Gallaher sites
- Provision of continuing skills support to high value & sustainable businesses
- Improve productivity by increasing the overall employment rate
- Development opportunities along the A8 corridor (including sites owned by Invest NI)
- Major physical developments proposed in Ballymena (St Patrick's Barracks and Gateway Development) including business accommodation for start-ups and 'move-on' space
- Redevelopment/ diversification of Port of Larne
- Development of energy storage and renewable energy facilities at Islandmagee
- Regeneration of town centres to assist retail & tourism offering
- Develop tourism product through promotion, collaboration & infrastructure improvements
- Address broadband issues in rural areas



4. The Strategic Framework

Our Vision

4.1 Our vision for Mid and East Antrim has been informed by:

- the challenges and opportunities set out in the preceding Sections
- the economic priorities in the Draft Programme for Government of economic participation, inclusion, productivity, innovation and competitiveness
- aspirations for future economic growth in the Borough.

4.2 The Vision is as follows:

By 2030, we want Mid and East Antrim to be:

- *A nationally competitive economy, with Output, Productivity and Wage Rates at least 95% of the UK (including London) average*
- *Northern Ireland's leading centre for Advanced Manufacturing and Agri-Food with recognised capabilities in Tourism, Financial and Business Services, and Digital Technologies*
- *Operating with an economically active population equal in size in percentage terms to the UK (including London) average, known for its high-level skills, and providing critical labour mass in our priority sectors*
- *A proud, vibrant, and ambitious place, which collaborates with other centres, encourages business and its investment, and is recognised for people wanting to live and work here.*

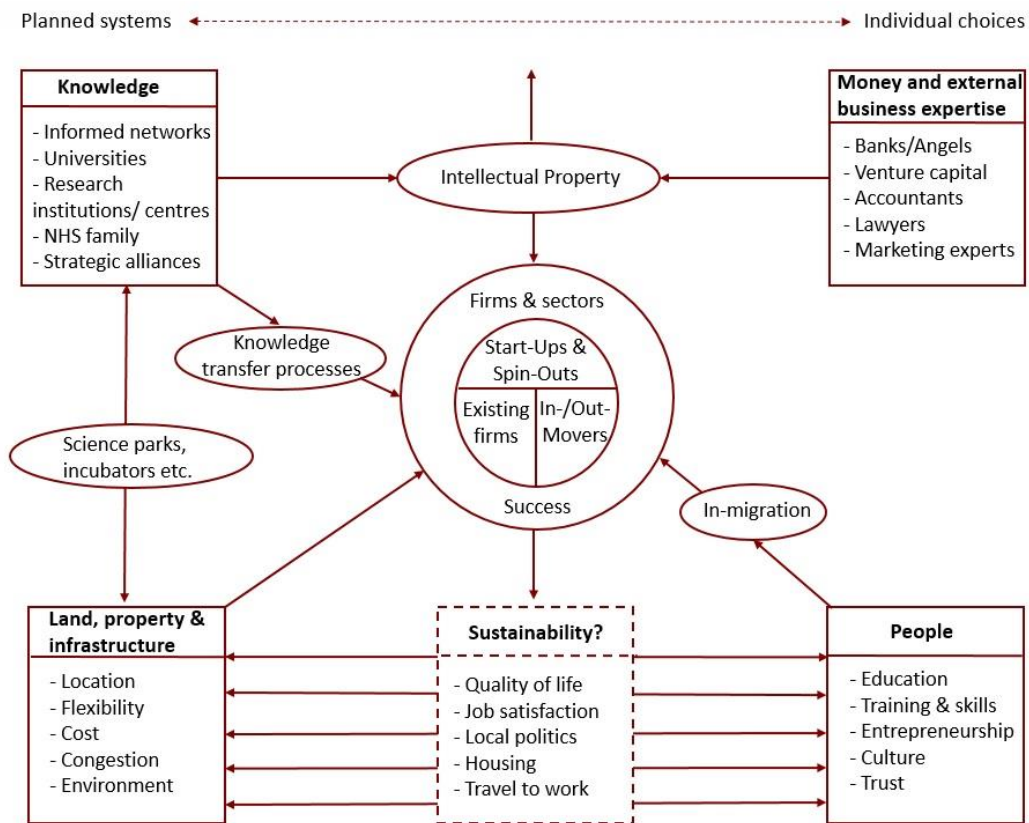
Where we want to get to..

4.3 In order to realise this Vision, we need to create an innovation ecosystem that ensures joined-up support from the wide range of agencies. In the UK and internationally, one of the most recognised economic ecosystems is in Cambridge, and much work has been done to try and characterise how and why the Cambridge economy, in terms of its performance, is so successful.

4.4 One helpful depiction is given in the figure below, which sets out conceptually how the different elements of a successful innovation economy interface and reinforce one another. What the diagram communicates, and what the wider experience of Cambridge and other truly innovative economies shows is that it is the working interfaces of the innovation and knowledge bases with land/property/infrastructures, with people and their skill sets, and the lubricating factors of money and external expertise, and all the permutations thereof, centred on business needs, that makes for real innovation success. That's what the innovation ecosystem means, and that's what we want and need in Mid and East Antrim.



Figure 4-1: Economic development ecosystem



The Framework's Architecture

4.5 The analysis of Mid and East Antrim's economy was presented in Chapter 3 through the lenses of five drivers of productivity. In structuring our Framework, we have adopted these same five drivers as our key **Strategic Priorities** going forward, with a minor change replacing 'investment' with 'infrastructure'. These priority areas were also reflected in the feedback from the stakeholder consultations and business survey. To remind the reader, these Strategic Priorities, which are of equal importance, are:

- Enterprise and Entrepreneurship
- Innovation
- Employment and Skills
- Infrastructure
- Inclusion and Well-being

4.6 To these, we have added **three Cross-Cutting Themes**, intended to thread through the Framework and provide the integration and coherence that an integrated economic strategy must provide. The Cross-Cutting Themes are:

- Building economic capacity & capability, including robust Monitoring and Evaluation



- Improving the profile & branding of Mid and East Antrim, including for Foreign Direct Investment.
- Delivering Strong Strategic Fit – ensuring all partners at the local and Northern Ireland level are delivering against the aims and objectives of **Amplify**.

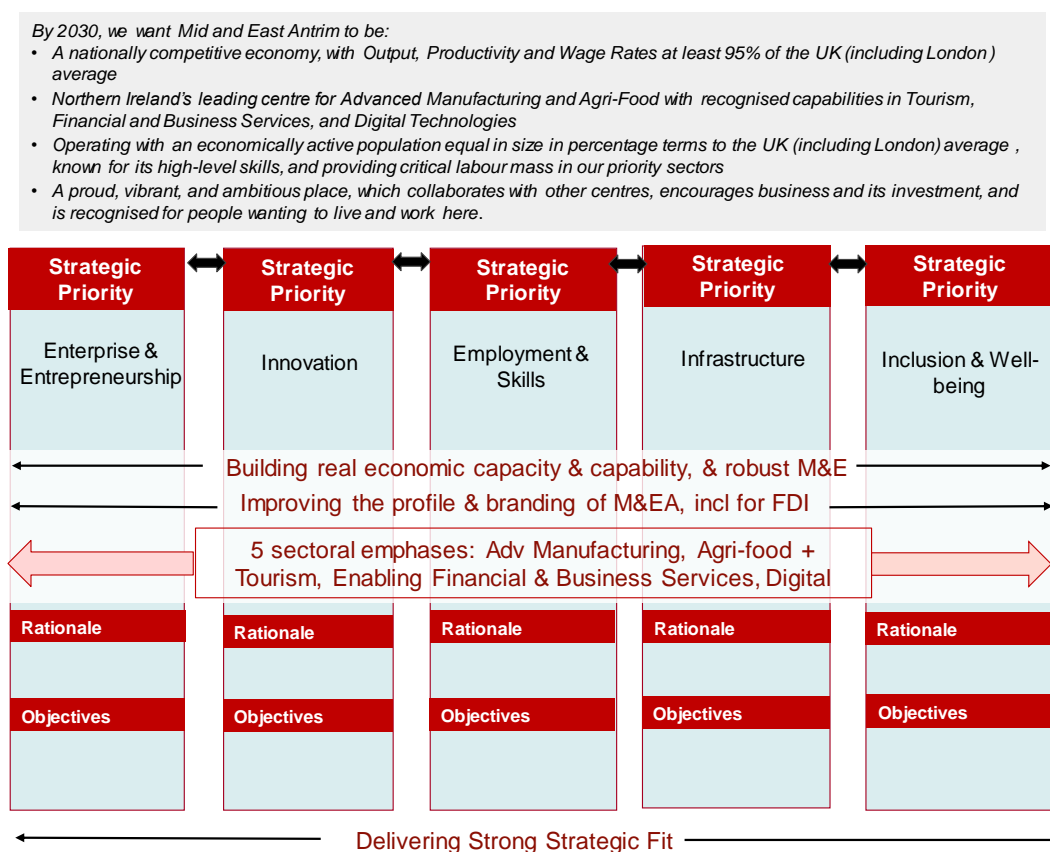
4.7 In addition, we have defined five **Sectoral Emphases** reflecting the current and future potentials of Mid and East Antrim’s economy, and at which the Framework is directed primarily. Building on Smart Specialisation thinking, and drawing on the assessment of sector strengths from the Framework’s evidence base, these are:

- Existing priority sectors
 - Advanced Manufacturing
 - Agri-Food
- Emerging priority sectors
 - Tourism
 - Financial and Business Services
 - Digital.

4.8 The interrelationships of the structural components are depicted in headline terms in the diagram below. We then go on to present each of the Strategic Priorities, the Cross-Cutting Themes and the Sectoral Emphases in more detail. A fully populated version of the Framework concludes this Section.



Figure 4-2: Amplify's Strategic Framework – headline structure



Enterprise and Entrepreneurship

Increase the Business Birth Rate & the Growth of Local Firms

- 4.9 Although the last few years have seen good levels of GVA and employment growth in the Mid and East Antrim area, growth has been largely delivered by a small number of large manufacturing and agri-food employers. The recent announcements at JTI Gallaher and Michelin have highlighted the risks of depending too much on a few key employers. The Economic Impact Assessment commissioned by the Mid and East Antrim Manufacturing Task Force shows the closures will result in the loss of between nine per cent and 13 per cent of total GVA output which represents a significant economic shock.
- 4.10 The current situation actually presents an opportunity to generate a large number of new start-ups in the area and support is currently being provided to these workers by local partners including Northern Regional College, Ballymena Business Centre and the Department for the Economy.
- 4.11 The data set out earlier on business starts and entrepreneurship activity show that the local economy needs more start-up businesses. This will help to create a more diverse, competitive and dynamic local economy.
- 4.12 Although important to continue to support the large employers that remain in the Borough, there needs to be renewed emphasis on nurturing a broader pool of existing SMEs to grow, innovate and export. As discussed earlier, there are some strong performing businesses in



Mid and East Antrim and Invest NI manages a portfolio of some 200 growth-orientated firms that can access tailored support in innovation and exporting.

- 4.13 The Strategy calls for greater promotion of the support that is available through Invest NI but also additional support for the next tier down to create a stronger pipeline of growth firms in Mid and East Antrim. We want to create a larger pool of indigenous SMEs that can grow, export and create new employment opportunities in the Borough. The Council and local partners will have a key role in delivering this support.

Create a Culture of Enterprise in the Businesses & Education Systems

- 4.14 Developing a new culture of enterprise needs to start from a young age and more could be done to promote enterprise in our schools. As is the case in many parts of Northern Ireland, the school system tends to focus on academic achievement with a view to young people progressing on to Further and Higher Education. However, this may not be appropriate for all and there should be more work with schools to promote entrepreneurship from an early age through Young Enterprise and similar initiatives.

Grow the business base through new inward investment

- 4.15 The last major Foreign Direct Investment project in Mid and East Antrim was Michelin in the late 1960s. As recent site-closure events have demonstrated, there are risks in putting too much focus on FDI. However, as well as growing the indigenous firm base, the area should do all it can to position itself for high quality and sustainable inward investment including those FDI projects which are being supported by Invest NI. This will require developing a strong investment proposition, and close working between the Council and Invest NI.

Innovation

Increase Levels of innovation, R&D, engagement with HE/FE

- 4.16 Business expenditure on R&D (BERD) is one of the main measurements of innovation. The UK as a whole does not perform well on this metric compared with other advanced economies, and Northern Ireland has some of the lowest levels of BERD per capita in the UK. Although there are no equivalent data for local council areas, consultation feedback suggests that innovation activity in Mid and East Antrim is low and limited to a number of the larger firms in the Borough. The lack of a university campus is notable, although there are nearby locations in Belfast, Jordanstown and Coleraine.
- 4.17 There are, however, some good examples of industry-HE engagement locally. Caterpillar and Wrightbus are involved in the Northern Ireland Advanced Composites and Engineering Centre with Queens and Ulster Universities and Wrightbus has set up a R&D centre with Queens University to develop composite technologies. Moy Park is also working with Queens University on business leadership training and there are other individual Knowledge Transfer Partnerships (KTPs) involving local firms.
- 4.18 There is perhaps stronger engagement between local firms and the FE sector, specifically Northern Regional College, which has two campuses in Ballymena. The College has specialist equipment which can be used by firms at their Integrated Manufacturing Centre in Ballymena. It also provides programmes are targeted at micro and small businesses in the advanced



engineering and manufacturing sectors. The support is demand-led and would benefit from more promotion locally.

- 4.19 Innovation is a key strand to economic competitiveness and drives productivity improvement. **Amplify** will review the current activity taking place locally and use this to promote innovation support from the Universities, Invest NI and others to a broader number of firms. As an example, more could be done to promote R&D tax credits so that firms have a better understanding of what is categorised as R&D and can then re-invest funds into their business.

Attract New Technology Firms to our Area

- 4.20 As shown in earlier evidence, there is a limited population of digital and technology firms in Mid and East Antrim, and low levels of Knowledge Economy jobs. The redevelopment of the Ecos Centre in Ballymena with Science Park style workspace is an important initiative which will encourage more technology-based firms to the Borough. However, this is just one initiative and more support needs to be provided to create more higher value jobs in our priority sectors, particularly around advanced manufacturing, agri-food, financial and business services and digital sectors. This support could include FDI promotion, the creation of suitable sites and premises and tailored business and start-up programmes.

Develop a strong innovation 'ecosystem'

- 4.21 As highlighted above, we want create an effective innovation ecosystem where all support agencies, businesses and communities are working together to encourage innovation and economic growth. Across all stakeholders in public, private and third sectors, there is a need to embrace new developments in innovation policy, such as the shift from closed to open innovation.

Employment and Skills

Retain the JTI/Michelin skills base

- 4.22 Local agencies are already supporting workers affected by the two closures. The priority is to redeploy these workers as quickly as possible either through helping them set up in business or finding alternative employment, either in Mid and East Antrim or indeed elsewhere. Some of the more skilled labour have already moved to other manufacturing firms and this is important for the area to retain as many of these skilled workers as possible. There needs to be continued engagement with the two firms through the ongoing redundancy process from the relevant business and skills support agencies.

Change Mind-Sets towards Enterprise & Vocational Training

- 4.23 **Amplify** will improve the skills of young people to better equip them for the world of work. Due in part to the presence of large manufacturing employers, there has perhaps been some complacency amongst young people that they will leave school and immediately find a job. This is no longer the case and there needs to be more effort to promote enterprise and vocational skills in local schools as well as promoting Higher Education opportunities where appropriate. Enterprise in schools is not just about promoting entrepreneurship but also fostering a more pro-active 'can-do' attitude to work and learning.



- 4.24 Similarly, there needs to be a new culture of enterprise within local businesses which encourages ongoing workplace training and CPD. What **Amplify** wants to establish is new mind-set where all workers are given the skills support they need from basic literacy and numeracy skills up to higher level technical qualifications.
- 4.25 Over the next few months we will be developing strategies for all five of our priority sectors (advanced manufacturing, agri-food, tourism, financial and business services, and digital) to better understand our assets, the opportunities for growth in these areas and the development needs of our businesses.

Support Local Firms to Grow Through Tailored Skills Support

- 4.26 A range of skills and training programmes are already available in Mid and East Antrim through Northern Regional College, other Department for the Economy initiatives and Invest NI. These need to be promoted more effectively to ensure greater take-up through events, case studies and better knowledge of employer and employee training needs. Again this needs to focus on our priority sectors that we believe will help to drive future economic growth in the Borough.

Infrastructure

Improve the Profile of the Borough for Investment & Tourism

- 4.27 FDI has always been important for the Northern Ireland economy and there are likely to be new opportunities following the changes to Corporation Tax in 2018. In light of these changes, and more generally, we need to be ready with a strong FDI proposition which covers sites and premises, local skills and links into HE and FE support networks.
- 4.28 From a planning perspective, the new Council clearly has an important role in facilitating the development of new sites where it fits with the emerging Local Development Plan. Using its new responsibilities for planning and economic development, the Council needs to take a proactive approach working closely with investors and communities to encourage new employment opportunities. Particularly following recent job announcements, the Council and partners need to make sure people know the Mid and East Antrim is open for business.
- 4.29 Our local environment and quality of life are key assets for our place. The area has a strong tourism product with untapped potential and with further development this can create economic benefits across the urban and rural parts of Mid and East Antrim. With a new Council, we need to increase the profile of Mid and East Antrim as a place to invest, live, work and visit. The new Mid and East Antrim Tourism Strategy has an important role in setting out what we can do to develop the tourism product and promotion. The new Tourism Strategy is based around five strategic themes which aim to develop the product and enhance the visitor experience:
- The Causeway Coastal Route
 - Culture and Heritage
 - Events and Festivals



- Destination Marketing
- Destination Management

Improve start-up accommodation/ grow-on space & SFBB connectivity

- 4.30 Through **Amplify** we want to increase the number of start-ups and growing local businesses. We need to have the right property portfolio to support these aspirations. Although there are some existing start-up units across the Borough, some of which are managed by the Enterprise Agencies, most of these are occupied or not suitable for start-ups. New accommodation is already being developed at the Ecos Centre but we need more premises for start-ups and also those successful firms looking to expand within the Borough. This type of business accommodation needs to be central to major developments being planned around Ballymena (St Patrick's Barracks and the Gateway projects). Larne and Carrickfergus would also benefit from similar investments.
- 4.31 Superfast Broadband is becoming a must for most successful businesses enabling the adoption of new technologies. Improving Broadband coverage and infrastructure remains a priority particularly for some of the more rural parts of Mid and East Antrim. Project Kelvin has provided the area with fast connectivity to North America as well as improved connectivity to mainland Europe. We need to make sure we are fully exploiting the opportunities from this investment. We also need to make sure businesses are fully exploiting the economic benefits of superfast broadband.

Improve our Towns and Villages & East-West Connections

- 4.32 Town centres are clearly important hubs for investment and tourism. They also contribute to a sense of place and quality of life for residents. There have been recent investments in public realm improvements and a new Business Improvement District (BID) has been set up in Ballymena to lever in more investment. However, the lack of a night-time economy in the three main towns, and indeed in our other more rural settlements, encourages residents to spend their money outside the Borough.
- 4.33 Ballymena has traditionally been one of Northern Ireland's key retail destinations. However, it has suffered recently from the economic downturn and new trends in online and out-of-town retail. Through the BID and other support, the aim is to ensure the town can retain its status as a key retail and commercial hub in Northern Ireland.
- 4.34 More generally, there is need to think more creatively about how to make best use of our town centres. This includes how **Amplify** and its actions improve the retail product, creates space for local events and festivals, develops a vibrant night time economy, and encourages more business start-up activity. Simply put, **Amplify** calls for a more innovative approach to planning and managing our towns and villages.
- 4.35 Mid and East Antrim brings together the three former boroughs of Ballymena, Larne and Carrickfergus. As mentioned earlier there have always been strong links between Larne and Carrickfergus into Belfast but Ballymena, with its larger population and business base, has acted more as a self-contained local economy. Links between east and west have therefore



been quite limited. In order to make a more cohesive economy, more could be done in terms of public transport provision to bring together all parts of Mid and East Antrim.

Inclusion and Well-Being

Increase Economic Activity Levels, and Promote Employment & Training Opportunities for All

- 4.36 Although economic activity rates are relatively high, there remains work to do in certain locations in our area's urban areas to ensure everyone has an opportunity to contribute to the local economy. Much work has been done in the Neighbourhood Renewal Areas in Ballymena as well as the more deprived estates in Carrickfergus and Larne. However, there continues to be social issues which prevent people from realising their economic potential. The Strategy therefore calls for more targeting of enterprise and employability support in the more deprived areas.
- 4.37 The objective of **Amplify** is to grow the local economy through helping local businesses and to ensure all residents can fulfil their economic potential. Many residents work in the Borough but there is also a sizeable number that work outside Mid and East Antrim. Although their direct economic output will be captured elsewhere, a lot of their income will be spent locally (e.g. in shops, restaurants and bars) which in turn sustains local employment and GVA. When supporting young people and the unemployed into work, partners need to promote relevant employment opportunities regardless of where the jobs are based. As already highlighted, there has traditionally been a high number of residents from the former Carrickfergus and Larne Council areas commuting to Belfast for work. Improvements to transport links will make this easier in the future.

Promote the Social Economy

- 4.38 There are almost 500 social enterprises in Northern Ireland with over 12,000 employees and a further 13,000 volunteers. The social economy in Mid and East Antrim has a key role in terms of promoting social cohesion, neighbourhood renewal, helping people into work and improving the environment. Social enterprises and community groups make an important contribution to delivering public and commercial services, as well as contributing to the local retail and tourism offer. There needs to be continued support of the good work that is currently being delivered by social enterprises and more of encouragement of alternative supply chain models such as the creation of local engineering supplier Advance Engineering by the Wright Group in Ballymena. The theme of enterprise which runs through this Strategy includes encouraging more social enterprise start-ups.

Cross Cutting Themes

- 4.39 The creation of the new Council coupled with the transfer of new responsibilities for planning, local economic development and Community Planning provide exciting opportunities for local leaders to 'step up to the plate'. Councils now also have the 'Power of General Competence' which gives them the greater freedom to make a difference to their communities.
- 4.40 In helping to implement **Amplify**, the Council and partners will embody entrepreneurship and innovation, two key priorities for this Strategy. Mid and East Antrim aims to be the most 'pro-



business' Council area of Northern Ireland. This will be achieved through a stream-lined planning process and strong collaboration with the business community in both implementing the Strategy and in helping the growth of local firms.

Building Real Economic Capacity and Capability and Robust Monitoring and Evaluation

4.41 There are three main strands to this Cross-Cutting Theme:

- A Civic Leadership Development Programme – building enthusiasm and expertise for change
 - Following the transfer of new powers to Councils and the recent local economic shocks, there is a commitment from the Council's elected members and senior executives from the Council and partners to further enhance their economic development skills and expertise. Through improved understanding, partners will have the tools to better influence external policy-makers and investors and ultimately help to bring new innovative economic development projects to the Borough
- Expert and directive analysis, risk management, and strategic planning
 - The remit for the local partnership set up to take forward the Strategy will include taking a strategic view of the performance of the local economy in the context of wider economic issues affecting Northern Ireland and the UK more generally. This will include identifying and managing risks and potential further economic shocks
- Using Monitoring and Evaluation to inform strategic decision-making
 - Tracking the performance of Strategy Actions through monitoring data and reflecting on robust evaluation evidence will form the basis of decision-making within the local partnership.

Improving the Profile and Branding of Mid & East Antrim, including for FDI

4.42 In delivering **Amplify**, we want to be clear on the profile and branding of the area for FDI but also generally to encourage a sense of identity amongst residents and businesses. We want to promote our assets and capabilities in our five priority sectors of advanced manufacturing, agri-food, tourism, financial and business services and digital. Whilst the area can boast a strong industrial and agricultural heritage, it also has beautiful landscape and a strong quality of life offering.

4.43 Due to its location, Mid and East Antrim is well positioned to grow as part of the wider Belfast City Region. For example, it can offer high quality of life for people working and studying in the city. It can also offer businesses an attractive proposition in terms of affordable accommodation with good, fast links into the city and ports and airports. There are expected to be new inward investment opportunities for Northern Ireland following the changes to Corporation Tax. Mid and East Antrim needs to have its investment proposition fully developed and understood so that Invest NI, in partnership with the Council, can promote the area for appropriate investments.



Delivering Strong Strategic Fit

- 4.44 Some of the changes implemented through Local Government Reform have still to play out. Although the transfer of new powers to the Council and Community Planning partners provide great opportunity for local ownership, there needs to be clear strategic alignment between local partners and Northern Ireland agencies such as Invest NI, Department for the Economy etc. Fundamentally, we need to ensure all partners are working together to the benefit of Mid and East Antrim. In a period of continuing economic uncertainty following the 'Brexit' decision, we also need to ensure strong strategic resilience so that the area is well-equipped for any eventuality.

Sectoral Emphases

- 4.45 Although this is a Strategy for all businesses, residents and organisations in the Borough, it makes sense to focus effort on those sectors that can deliver most of the growth. The following sectors have been selected as priorities for the Mid and East Antrim economy. They are categorised as existing priority sectors and emerging priority sectors.



Table 4-1: Existing priority sectors

Sector	Current profile	Opportunities for growth
Advanced Manufacturing	<p>Manufacturing currently accounts for a fifth of local jobs (10,000) and a quarter of GVA output. These figures pre-date the ongoing closures at JTI Gallaher and Michelin. According to recent research by Manufacturing NI, it is estimated that there are around 3,500 jobs in <i>advanced</i> manufacturing.</p> <p>Mid and East Antrim is known as one of Northern Ireland's manufacturing heartlands, and although there have been some major recent set-backs, the skills and work-ethic of the local manufacturing and engineering firms are major assets to build on further. Manufacturing firms also account for a large share of Northern Ireland exports.</p>	<p>Recognising that lower level manufacturing will continue to shift to lower cost economies, Mid and East Antrim needs to focus on higher value advanced manufacturing through a greater emphasis on innovation and collaboration. The area is already home to some key manufacturing employers such as Wrightbus, Caterpillar and Ryobi.</p> <p>Although there is expected to be a net decrease in manufacturing (but still significant demand for replacement supply), it is expected to still account for 6,500 local jobs and 13% of the total workforce in 2030.</p> <p>Through the Strategy, the aim is that most of these jobs will be highly skilled and well-paid advanced manufacturing jobs. Specific opportunities will be explored and articulated in an upcoming Advanced Manufacturing Strategy.</p>
Agri-Food	<p>This is one of the most successful sectors across Northern Ireland, and Mid and East Antrim has strong traditions and capabilities both in terms of agriculture and food production and food processing.</p> <p>Nearly a third of local businesses are in the agricultural sector. Employment in food manufacturing is part of the total 10,000 manufacturing jobs in the Borough and includes Moy Park based in Ballymena which is one of the area's key employers.</p>	<p>With growing global focus on food quality, safety and provenance, an area like Mid and East Antrim is well placed to develop as a leading centre of excellence. The Agri-Food Strategy Board predicts annual jobs growth of 3-4% pa and major increases in GVA.</p> <p>With high levels of exporting, both Advanced Manufacturing and Agri-Food are important sectors as Northern Ireland continues to try to re-balance the regional economy. Specific opportunities will be explored and articulated in an upcoming Agri-Food Strategy.</p>

Table 4-2: Emerging priority sectors

	Current profile	Opportunities for growth
Tourism	<p>Mid and East Antrim's local environment and quality of life are key assets. Tourism has a key role to play in terms of attracting visitors, but also in terms of attracting businesses and new residents. There are already around 4,000 tourism-related jobs.</p> <p>Key local attractions include the Gobbins and Carrickfergus Castle and high quality accommodation is also available at Galgorm Resort and Tullyglass House Hotel. The Council and partners including Tourism NI have been developing a new Tourism Strategy for the area, and this and its Action Plan will come within the scope of Amplify.</p>	<p>The new Tourism Strategy identifies the need to building business capabilities and the quality of the visitor experience around five strategic themes:</p> <ul style="list-style-type: none"> • The Causeway Coastal Route • Culture and Heritage • Events and Festivals • Destination Marketing • Destination Management <p>The main area of opportunity is around promoting the Causeway Coastal Route, ensuring the Gobbins, Galgorm, Game of Thrones locations and Carrickfergus Castle are a key part of the visitor</p>

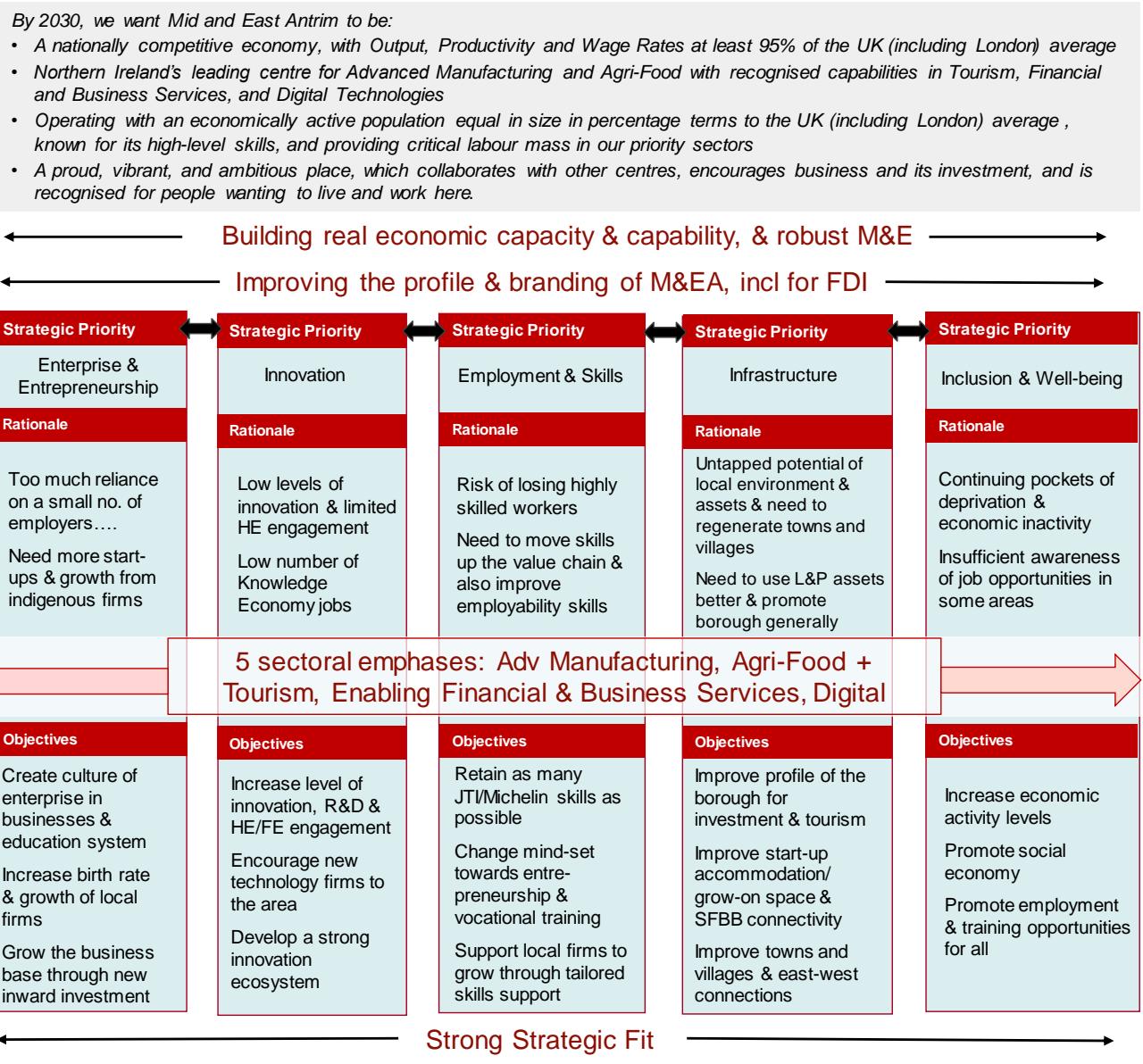


	Current profile	Opportunities for growth
Financial and Business Services	As Belfast continues to grow, Mid and East Antrim should position itself for back-office functions in the Financial and Business Services sector. There are currently around 2,000 jobs in related sectors,	<p>itinerary. These types of attractions have the potential to draw more visitor spend to the Borough.</p> <p>The area currently mainly attracts day trips from the Northern Ireland market and there are opportunities to work more closely with Tourism NI to attract more UK and international visitors.</p> <p>With strong transport links into the city and proximity to the airports there is a real opportunity to grow the sector further. Specific opportunities will be explored and articulated in an upcoming Financial and Business Services Strategy</p>
Digital	Although the area only has around 300 ICT jobs, the new NISP facility currently being built at the Ecos Centre in Ballymena will be an important development in creating more technology jobs in the area.	<p>According to MATRIX⁵, Northern Ireland has a real opportunity to build on its present capability in software engineering, data analytics, networks and sensors and cyber security.</p> <p>Although Mid and East Antrim does not have any university campus, there are opportunities to position Mid and East Antrim as a key location for new jobs in this growing sector within the wider Belfast City Region. Specific opportunities will be explored and articulated in an upcoming Digital Strategy</p>

⁵ Matrix (2016), Matrix Digital ICT Report 2016



Figure 4-3: Amplify's Strategic Framework



5. Looking towards Implementation – the things to get right

- 5.1 Drafting strategies is easy; implementing them is hard. The situation will not be any different in Mid and East Antrim; successful implementation will only come about through drive, commitment, and hard work.
- 5.2 Mid and East Antrim does not, however, start from scratch. There is now a wide body of evaluation experience focusing on what makes for economic, efficient, and effective implementation. As Partners take **Amplify** forward, these evaluation lessons will provide helpful pointers and short-cuts on how to do implementation well. More than any other, clarity on the *functions* and then the *forms* of implementation will be the single most important consideration.
- 5.3 In *function* terms, implementation of **Amplify** needs to achieve the following:
- **A real understanding of the socio-economic state of the Mid and East Antrim, absolutely and relatively.** The evidence assembled in the course of drafting this Framework provides a firm foundation to build on, but this will need to be refreshed regularly and, crucially, partners will need to move their focus on from the data numbers to the causes and explanations underlying these. Clarity of who is responsible for providing the data and identifying when new data becomes valid for comparison will be important.
 - **A long-term vision of where Mid and East Antrim should, and could, be as an economy.** This is particularly hard to do within the constraints imposed by public sector spending windows and during a transition period for the local economy following the closures of two such important employers. It is vital in ensuring stability of the strategy, despite external changes and uncertainty, that the end point of our collective journey is understood and maintained. It is helpful to identify what levers are actually available and who owns them so that all parties are clear what may be achievable, rather than allowing subsequent actions to become just a wish list.
 - **Robustness in making the hard choices resulting from our vision.** Simply put, *‘doing what you’ve always done gives what you’ve always got’*. If Mid and East Antrim is going to move ahead and re-establish itself as a modern, diverse, and resilient economy, then those activities underway that are not contributory will need to be left behind. Some simple prioritisation or categorisation of the actions will be helpful early on, so that people are challenged to consider how they can assist the implementation of those actions that are most attractive
 - **Top quality design, implementation, and delivery of actions to take the strategy forward.** This will require looking way beyond Mid and East Antrim’s borders to see how specific economic challenges have been addressed elsewhere. It may also mean, on occasions, facing up to the fact that delivery capability within Mid and East Antrim is not of the calibre or scale needed to tackle the particular challenge we face, and not being uncomfortable about securing solutions from elsewhere in the UK or further afield



- **A real commitment to monitoring and evaluation**, so that the relevance locally of strategy action is constantly reviewed, and delivery impact evidenced and maximised (Some suggestions on how Monitoring and Evaluation should be taken forward are set out in the next Section)
- **The continuing enthusiasm of partners**, to ensure that the process of implementation remains consensual and inclusive, and that energies and resources are fully captured. Clarity of ownership of actions between the partners is particularly beneficial. If there is a clear leader, let them lead. Where there is a collaborative action, spell out who will actually be responsible for galvanising activity
- **Consistent presentation of Mid and East Antrim's economic development agenda. Amplify** must become established as the definitive statement of economic development in the area, if notice is to be taken of it. Developing a common language or shorthand for the key actions so that everyone recognises them easily can be important to avoid confusion or unhelpful related actions being developed in parallel by partners.

5.4 Having agreed what the key *functions* demanded of the strategy are, then and only then, should attention focus on defining suitable *forms* by which these functions can be delivered. All too often, albeit with best intention, forms for implementation are agreed before functions have been properly specified. Any form will through its structure need to embody the following:

- **Legitimacy from, and accountability to, the businesses, people, and communities of Mid and East Antrim.** Typically, this is realised through a wide partnership group, and in a Mid and East Antrim content would be designed to ensure ownership of, and support for, the Strategy from the totality of partners involved in the Borough.
- **Strategic Leadership capable of charting the long-term path for the Strategy's direction and implementation.** Like a company's supervisory board, this group would be responsible for the overall strategic direction of the Strategy, and for championing Mid and East Antrim and its economic regeneration priorities to key audiences. To be optimally effective, the Board would need to comprise individuals with a well-developed understanding of economic, social, and physical regeneration, and strong familiarity with the wider sub-regional, regional and national policy contexts. Alongside Public Sector representatives, the Board should involve specific representation from the Private and Voluntary Sectors. The Board would be the formal interface at senior level between the Borough, Northern Ireland Agencies and the Northern Ireland Assembly.
- It is important that the Public Sector representation include elected representatives chosen for their strategic ability and willingness to be part of this group, whilst not necessarily aiming to cover all possible democratic bodies. Any of the Council's Elected Members should be appointed for at least two or three year terms to ensure momentum and trusted relationships with the private and voluntary sectors can be built
- **An Operational Executive, which would have principal responsibility for overseeing, co-ordinating, and shaping the practical delivery of Amplify, and**



leading its monitoring and evaluation. It would not directly deliver the Framework, but would work closely with those partner agencies progressing actions, providing them with resources, support, and encouragement. The Operational Executive would have a crucial role in looking across delivery to make sure the various structural elements of the Strategy cohere; it would also provide the administrative and secretariat requirements of the wider partnership. Public sector representation from partner organisations would be in the form of executive staff

- **A Delivery Infrastructure, responsible for taking forward those actions defined by the Framework.** As far as possible, these actions would be delivered through the range of existing delivery bodies, ideally working to clear Service Level Agreements defined by the Strategy to ensure excellence, innovation and value for money in delivery.
- In other cases, where the nature or scale of challenge of the action demanded that some new form of delivery was appropriate, this might involve forming a bespoke delivery vehicle, or buying a solution to the delivery challenge from the market. New approaches to delivery and procuring services will be considered by partners. **Particularly in light of recent economic and political changes the delivery infrastructure cannot, and should not, be a case of ‘more of the same’.**
- As mentioned earlier, it is helpful for all partners to be clear about prioritisation. Some actions will be pragmatic and achievable quickly, some will be challenging but worth developing now, and others will be ambitious and visionary. It is important to be clear on whether the delivery challenge is about function or form. Being clever about the form will not necessarily overcome a challenge that is about the function.

5.5 As a core partner, now with lead responsibility for local economic development, the Council needs to invest heavily in its internal capacity and capability. The quality and calibre of economic development staff amongst the Council and key partners need to reflect the ambition articulated in Amplify and the scale of the challenges in transforming the local economy.

5.6 When it was created in 2015, Mid and East Antrim Borough Council stated that the economy was its number one priority. It now needs to be put in the necessary investment to create the capacity and expertise to deliver its economic objectives as set out in the Corporate Plan and Community Plan.

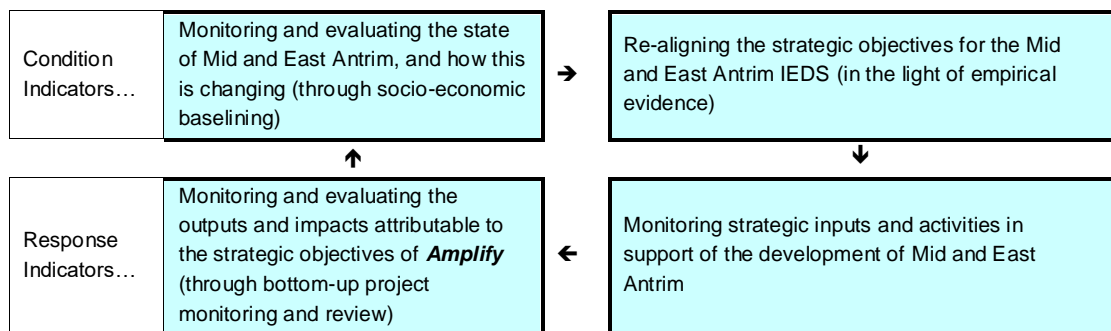


6. Monitoring and Evaluation

- 6.1 **Amplify** represents a new and bold approach to supporting the people, communities, and businesses of our area. The undertaking will be a significant one – the challenges to be faced are stretching and the operational context will not be static. Changes will come from within the locality in response to the Strategy and from elsewhere as the economic and policy environment changes. New funding opportunities may also materialise which are likely to have a direct impact on the aspirations set out in the Strategy.
- 6.2 To respond to these challenges, and to demonstrate progress, it is vital that the delivery of **Amplify** is underpinned with a robust Monitoring and Evaluation framework, which is able to provide intelligence, both in real time and in retrospect, on the changing strategic context and on the differences that the Strategy and its actions are leveraging.

Component parts of the Framework

- 6.3 In order to meet the above requirements, the Monitoring and Evaluation Framework will need two parts. A **top-down component** will monitor the changing state of conditions in Mid and East Antrim, requiring the use of *Condition Indicators*. The **second component will be bottom-up**, and will enable the Strategy's activities, outputs, and outcomes/impacts to be assessed using appropriate *Response Indicators*.



Designing the Framework

- 6.4 The two components described above must be, as far possible, consistent and fit together well. To achieve this, the process of designing the final framework needs to be an iterative one with three distinct stages of development:
- Sketching out the framework's main building blocks. This will require:
 - Defining the principal *Condition* Indicators consistent with the Strategy's strategic objectives
 - Specifying the *activity categories* that capture the contribution of actions on the ground
 - Developing the *logic chains* that connect the inputs and activities to the outputs and outcome/impact measures within each activity category



- **Populating the architecture of the framework with detailed indicators.** This will require detailed consultations with those partners involved in delivering specific Strategy actions, once these have been identified prioritised and scheduled
- **Specifying the complete framework in terms of monitoring and evaluation procedures.** In other words, an operational model and a schedule of actions that will need to be put in place to ensure that the Framework actually delivers on the ground. This stage will involve the preparation of guidance and rollout workshops to promote awareness and understanding.

6.5 Progressing these three stages of the Framework's development will be a significant undertaking, and will require the Strategy's partners to work closely and collaboratively at all levels. Reflecting this, it will be important early on in the life of the Strategy that resources be prioritised to enable this important task to be advanced.

Moving Forward

6.6 Until specific actions have been agreed and scheduled, complete with relevant response indicators, the Monitoring and Evaluation Framework cannot be fully populated. However, to give a flavour of what the framework might look like, we have set out below Condition Indicators for the key components of our Vision. In defining these, care needs to be taken to arrive at a set of Condition Indicators that reflects the challenges that **Amplify** is seeking to address, whilst ensuring an operationally manageable set of data.

6.7 To remind ourselves, our Vision is as follows:

- By 2030, we want Mid and East Antrim to be:
 - A nationally competitive economy, with Output, Productivity and Wage Rates at least 95% of the UK average including London
 - Northern Ireland's leading centre for Advanced Manufacturing and Agri-Food with recognised capabilities in Tourism, Financial and Business Services, and Digital Technologies
 - Operating with an economically active population equal in size in percentage terms to the UK average, known for its high skills, and providing critical labour mass in our priority sectors
 - A proud, vibrant, and ambitious place, which collaborates with other centres, encourages business and its investment, and is recognised for people wanting to live and work here.

A nationally competitive economy with Output, Productivity and Wage Rates at least 95% of the UK average

6.8 Overall targets for the Mid and East Antrim economy need to be ambitious, yet realistic especially given the job announcements from the last year. With this in mind, helping to grow the local economy to at least 95% of the overall UK performance, including London, is deemed appropriate.



- 6.9 As highlighted earlier the Draft Programme for Government contains emphases on economic participation, inclusion, productivity, innovation and competitiveness. These elements are all reflected in the core indicators for **Amplify**
- 6.10 Although historic GVA growth rates in Mid and East Antrim have outperformed the UK average, projected growth is expected to be slightly lower up to 2030 (1.9 per cent per annum compared to 2.2 per cent). Local productivity as measured by GVA per Worker has improved relative to the UK, but baseline projections still estimate Mid and East Antrim will be around 92 per cent of the UK by 2030. The latest economic activity and employment rates show that Mid and East Antrim is above Northern Ireland but slightly below the UK average. Wage rates in Mid and East Antrim are also currently around 90% of the UK average. On all of these measures, Mid and East Antrim has some work to do but through the new Strategy, reaching 95% of the UK performance is achievable.
- 6.11 The key metrics for measuring performance are set out below.

Table 6-1: Competitive economy metrics

Indicator	Commentary/ data source
GVA output	The Strategy evidence base used Cambridge Econometrics to produce annual GVA figures for M&EA. NISRA/ONS data is based on NUTS 3 area of 'East of Northern Ireland'. CE could be commissioned to produce comparable data on an annual basis to measure progress
Annual growth rate in GVA	The Strategy evidence base used Cambridge Econometrics to produce annual GVA figures for M&EA. NISRA/ONS data is based on NUTS 3 area of 'East of Northern Ireland'. CE could be commissioned to produce comparable data on an annual basis to measure progress.
GVA per Head	CE data on GVA was used combined with NISRA population data
GVA per Worker	CE data on GVA and employment was used in the Strategy evidence base
Economic activity rate	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey
Employment rate	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey
Gross Weekly Pay	Annual data available from NISRA Labour Market Statistics and the ONS Annual Survey of Hours and Earnings

Northern Ireland's leading centre for advanced manufacturing and agri-food with recognised specialisms in tourism, financial & business services and digital sectors . . .

- 6.12 This part of the Vision articulates our key sectoral strengths. These are the sectors that will be the key drivers of growth and that will help to raise the profile of Mid and East Antrim both internally and externally. As well as overall scale of activity in each of the sectors, there will need to be an assessment of their contribution to the wider economy compared to the Northern Ireland average. This will be tracked using Location Quotients.
- 6.13 The following set of metrics should be used to track the performance of these priority sectors.



Table 6-2: Priority sector metrics

Indicator	Commentary/ data source
GVA output for each of the priority sectors	Each of the sectors would need to be defined in terms the most relevant SIC codes. A request could then be submitted to NISRA to produce GVA and employment data for those defined sectors in Mid and East Antrim, Northern Ireland and the UK
Employment for each of the priority sectors	Each of the sectors would need to be defined in terms the most relevant SIC codes. A request could then be submitted to NISRA to produce GVA and employment data for those defined sectors in Mid and East Antrim, Northern Ireland and the UK
GVA and Employment Location Quotients	In order to assess the importance of these sectors to the local economy, Location Quotients could be used to compare Mid and East Antrim with Northern Ireland and the UK

An economically active population known for its high skills . . .

- 6.14 Economic activity, local skills and work-ethic are regarded as key strengths for the Mid and East Antrim economy. Again it is proposed that the main benchmark for economic activity and skill levels will be the UK average.
- 6.15 The main metrics to measure this part of the Vision will be:

Table 6-3: Economic activity and skills metrics

Indicator	Commentary/ data source
Economic activity rate	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey
Employment rate	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey
Proportion of workforce with no qualifications	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey
Proportion of workforce with Level 4+ qualifications	Annual data available from NISRA Labour Market Statistics and the ONS Annual Population Survey

A proud, vibrant and ambitious place . . .

- 6.16 This final part of the Vision encapsulates the confidence in the local economy. Population growth is one of the main indicators for measuring the overall success and vibrancy of a local economy. Tracking the number of new businesses moving in to the area also highlights the attractiveness of Mid and East Antrim as a place to do business. Measuring local confidence will require feedback from residents and businesses. In terms of the area's external links, this could be measured through collaboration projects between the Council and other local authorities. These metrics are summarised below.

Table 6-4: Place competitiveness metrics

Indicator	Commentary/ data source
Population growth	Annual data available from NISRA Population Estimates and ONS
Working age population growth	Annual data available from NISRA Population Estimates and ONS



Indicator	Commentary/ data source
New businesses moving to the area	Data should be captured by the Council's Economic Development team on the new businesses and jobs moving to the area. This can then be tracked over time
Residents feedback on economic confidence	The Mid and East Antrim Citizen Survey should include a question on confidence in the local economy
Business feedback on economic confidence	Although there is Invest NI's Purchasing Managers Index at the Northern Ireland level, a new business barometer should be set up which would include questions around business optimism
Collaboration projects with other local authorities	Projects with other Northern Ireland local authorities and transnational projects

6.17 Additional supporting indicators should also be included to track progress against the Strategic Priorities.

Table 6-2: Supporting indicators

Indicator	Commentary/ data source
Number of businesses per 10,000 working age population	Annual data available from NISRA/ONS – IDBR business data and population estimates
Number of new start-ups per 10,000 working age population	Annual data available through ONS Business Demography and NISRA/ONS population estimates
Business survival rates	Annual data available through ONS Business Demography
Business innovation activity rates	Northern Ireland data available through the ONS Innovation Survey. Mid and East Antrim should be collected through a new local business barometer. This should be discussed with NISRA and Department for the Economy
Unemployment claimant count rate	Annual data available from NISRA/ ONS
Average house prices	Data available from NI Quarterly House Price Index
Superfast broadband availability	Ofcom - UK Fixed Broadband Data



7. In Closing

- 7.1 The development and implementation of **Amplify** presents a major opportunity for our place and Northern Ireland more widely, and those organisations within it working for the benefit of our businesses, people, and communities. In an increasingly noisy world, where we must be ever more effective in making our voice heard, **Amplify** provides the sounding board for us to argue our case for economic development with commitment, conviction, and clarity.
- 7.2 Through the role of the local economic partnership in overseeing the strategy development process, lead partners have already actively committed to **Amplify**, and are providing resources to carry the Strategy forward. Now, other partners need to come alongside the Partnership to provide their inputs, support, and resources. Whatever the scope and scale of part you can play, we hope you will feel able to play it – for the benefit of our sub-region, its businesses, and its people.



Annex A: NI Strategic Context

Table A-1: List of relevant NI Strategies

NI Strategy	Vision	Strategic Objectives/Key Themes
Invest NI Corporate Plan (2011-15)	'To champion the growth of innovation and exports to build a local economy that competes globally. We will be a world-leading business development agency'	Stimulating innovation R&D and creativity Improving employability and the level/use/relevance of skills Competing in the global economy Encouraging business growth Developing economic infrastructure Promoting employment and employability
Skills Strategy for Northern Ireland (2011)	'To support the aspiration to grow the economy by ensuring that excellent leadership is provided from well qualified managers supported by a highly skilled workforce'	Raise the skill level of the whole workforce Raise productivity Increase levels of social inclusion by enhancing the employability of those currently excluded from the labour market Secure NI's future in a global marketplace
Innovation Strategy for Northern Ireland (2014-2025)	'By 2025 Northern Ireland will be recognised as an innovation hub and will be one of the UK's leading high-growth, knowledge-based regions which embraces creativity and innovation at all levels of society'	Cultural change; changing attitudes and behaviours Knowledge generation; creating an environment which encourages research and creativity Knowledge exchange; facilitating the exchange and access to quality information Knowledge exploitation; transformation of knowledge into products and services which add value
(Draft) Northern Ireland Export Plan (2015)	'A Northern Ireland economy characterised by a sustainable and growing private sector, where a greater number of firms compete more in global markets, creating growing prosperity and employment for all'.	Aim Create the conditions through which more firms are active and more successful in global markets, and so achieving the intents of the NI Economic Strategy Strategic objectives Grow the value of external sales/exports from NI in absolute terms; increase by 60-80 per cent at 2024-25 against baseline year of 2015-15 Increase the number of NI businesses engaged in external sales/exports Ensure range/balance in external sales and exports by focusing on the geographic markets which NI's prospects can be maximised
Investment Strategy for Northern Ireland (2011-2021)	'At a time of economic uncertainty, this Investment Strategy represents a significant stimulus that will protect jobs and lay down a modern and efficient infrastructure that will serve all our people well for many decades to come'	The objectives of this strategy reflect Executive priorities: Growing a sustainable economy and investing in the future Creating opportunities, tackling disadvantage and improving health/wellbeing Protecting our people, the environment and creating safer communities Building a strong community Delivering high quality public services



NI Strategy	Vision	Strategic Objectives/Key Themes
Northern Ireland Regional Development Strategy (2010-2035)	'An outward-looking, dynamic and liveable region with a strong sense of its place in the wider world; a region of opportunity where people enjoy living and working in a healthy environment which enhances the quality of their lives and where diversity is a source of strength rather than division'	The eight aims of the RDS support the executive principles towards achieving balanced sub-regional growth: Support strong, sustainable growth for the benefit of all parts of NI Strengthen Belfast as the regional economic driver and Londonderry as the principal city of the NW Support our towns, villages and rural communities to maximise their potential Promote development which improves the health and well-being of communities Improve connectivity to enhance the movement of people, goods, energy and information between places Protect and enhance the environment Take action to reduce our carbon footprint and facilitate adaptation to climate change Strengthen links between North and South, East and West, with Europe and the rest of the world
Belfast Metropolitan Area Plan (2015)	'An outward-looking, dynamic and liveable Region with a strong sense of its place in the wider world; a Region of opportunity where people enjoy living and working in a healthy environment which enhances the quality of their lives and where diversity is a source of strength rather than division'	A range of objectives around: supporting the growth and regeneration of cities, towns and villages; protecting sites and conservation areas; and identifying zones for retail, residential and commercial development across the city and outlying areas such as Carrickfergus, Castlereagh Lisburn, Newtownabbey and north Down
ERDF Investment for Growth & Jobs Programme for Northern Ireland (2014-2020)	'The strategic objective of the Programme is to promote smart, sustainable and inclusive growth, the achievement of economic, social and territorial cohesion, and high levels of employment and productivity'	Aims Strengthen research, technological development and innovation Enhance the competitiveness of SMEs Support the shift towards a low carbon economy Strategic objectives Increase NI business expenditure on R&D Engage more NI businesses in R&D Increase the number of high growth SMEs in NI Increase employment in NI micro and small businesses Increase NI consumption of electricity from renewable energy sources
Northern Ireland European Social Fund Programme (2014-20)	'The Strategic Aim of the ESF Programme 2014-2020 in Northern Ireland is to combat poverty and enhance social inclusion by reducing economic inactivity and to increase the skills base of those currently in work and future potential participants in the workforce'	Promote sustainable/quality employment and support labour mobility Promote social inclusion and combat poverty/discrimination. Invest in education, training and vocational training for skills/life-long learning Support the effective management and implementation of the NI ESF programme structures and achievement of the programme's aim/objectives



Annex B: Lessons from Comparator Areas

West Lothian, Scotland

Overview

West Lothian is located between Scotland's two major cities Edinburgh and Glasgow. The area has a population of 177,000 people (3% of Scotland's population), 86,000 residents in work, around 77,000 local jobs and 4,300 businesses. In 2014, the local economy was worth £3.5 bn in Gross Value Added (GVA). The four largest towns are Livingston (60,000), Bathgate (27,000), Broxburn (15,000) and Linlithgow (13,000). The area has recently become a popular area for young families and has the youngest and fastest growing population in Scotland with an average age of 38 compared with an average of 40 in Scotland. The population is predicted to increase a further 12% over the next 25 years.

West Lothian's central location and good road and rail connections (including the M8 and M9 and three rail routes from Edinburgh to Glasgow) have helped the area become a hub for retail, wholesale and distribution. It also has a significant manufacturing sector. The main private sector employers include Sky TV, Tesco, Asda Walmart, Morrisons, Johnson and Johnson Medical, Quintiles and Mitsubishi Electric.

West Lothian has always been part of Scotland's industrial heartland, firstly in coal mining, then as a centre for heavy industries and more laterally as part of 'Silicon Glen', Scotland's electronics cluster at the turn of the last century. It has successfully attracted large scale employers due to its strategic central belt location but it has also suffered from some of Scotland's largest closures.

In 1986, British Leyland closed its Bathgate plant with the loss of 1,800 jobs (at one stage it had employed 6,000 people in the town). In 2001, Motorola also closed a large Bathgate factory with 3,000 job losses which was then followed by 1,200 redundancies at NEC Semiconductors in Livingston. Most recently, in 2013, one of the area's main food manufacturers Hall's of Broxburn closed with 1,700 redundancies.

Economic development policy

Over the last thirty years, West Lothian has had to withstand some major economic set-backs. Through diversifying and continuing to grow its business base and workforce, the area has proved to be extremely resilient. As a result, in 2006 the area was designated Scotland's First Capital of Enterprise in the Enterprising Britain 2005 competition and in 2006 the local authority was awarded UK Council of the Year award.

West Lothian Council has always had a strong focus on economic development, working closely in partnership with Scottish Government agencies. The West Lothian Economic Partnership Forum is a sub group of the Community Planning Partnership and is focused on promoting West Lothian as an attractive place to do business. Partners include the Council, the Chamber of Commerce, Federation of Small Businesses, Department of Works and Pensions, Scottish Enterprise, Skills Development Scotland and representatives of the private sector.

The Council has a large economic development team with strong links with the local business base. The team currently has around 35 staff with responsibility for enterprise, skills, town centre management, tourism, investor support, economic policy and external funding. The team is also responsible for delivering the Scotland-wide Business Gateway service for start-ups. The Council work closely with Scottish Enterprise which account-manages the higher growth firms in



the area. There is also joint work in promoting the area for investment. In 2014/15, the Council supported around 500 SMEs and 400 start-ups.

The West Lothian Economic Strategy for 2010-2020 has four main priorities: creating a strong entrepreneurial base and increasing the number of businesses in key sectors; increasing opportunities for school leavers and improving access to learning; improving core employability skills and access to jobs; and promoting the area for investment. This strategy is supported by the West Lothian Community Plan and Single Outcome Agreement 2013-2020, and the West Lothian Regeneration Framework 2013-2020.

Following the closure of Halls of Broxburn in 2013, a five-year West Lothian Economic Recovery Plan was launched by the Council, Scottish Enterprise and the Scottish Government. The package pulled together £16m of existing resource and added £12m in new funding to fund training, grants for local businesses and communities. The Scottish Government also allocated Broxburn as an Enterprise Area which provides incentives for new food and drink manufacturing investment. It was recently announced that the 8 hectare former Hall's site has been sold to build 200 new houses.

Key lessons

Maintaining strong local partnerships has been important in the local area and the West Lothian Economic Partnership has existed for nearly 20 years. Through this partnership there is a joined-up package of business and skills support. The Council takes the lead in supporting local start-ups and growth firms can then progress to Scottish Enterprise Account Management support. The strong partnerships have helped the area deal with a series of economic shocks and add credibility when seeking additional funding support from the Scottish Government.

West Lothian has been successful in developing a diverse business base. Over the last 30 years, West Lothian has developed from a mainly manufacturing area to a more diverse economy with strengths in retail, wholesale, logistics, manufacturing and construction. Livingston has developed into one of Scotland's major retail destinations which has helped create a large volume of employment opportunities. However, the town also has a cluster of knowledge economy firms and higher value added jobs (e.g. the Scottish Enterprise funded Alba Innovation Centre in Livingston which has close links with Heriot Watt University).

Local partners have been effective in promoting the area as a place to live, work and invest. West Lothian has traditionally been one of the most successful parts of Scotland in terms of attracting inward investment. The scale of growth in Edinburgh has no doubt helped increase demand in West Lothian amongst residents and business. The Council and partners have also helped to make the case for transport infrastructure improvements such as new rail connections and stations, and new motorway junctions. However, through a supportive planning system the Council has invested in new business parks, new housing to support continued growth.



Flintshire, Wales

Overview

Flintshire has a population of 153,800 people, accounting for 5% of the total resident population in Wales. The area has around 72,800 residents in work, 72,000 local jobs and 4,850 businesses. In 2014, Flintshire and Wrexham, the lowest geography for which data are available, generated a GVA of £6.2bn (11% of Welsh GVA). Flintshire has a long and proud industrial heritage. The County today boasts many prominent companies, including Toyota, Airbus, Iceland (UK HQ) and UPM. However, whilst recent years have been characterised by inward investment success, GVA growth and productivity improvements, the economic outlook for Flintshire was much bleaker in the 1980s.

Specifically, Flintshire's fortunes took a significant turn for the worse in March of 1980, when the large Shotton Steelworks closed, with the loss of some 6,500 jobs. Confronted by this, the history of Flintshire in the late 20th Century and early 21st has been one of socio-economic hardship and reinvention post a major economic 'shock'.

Flintshire's economic development response to the steel job losses in the 1980s has in policy terms, been primarily focused on positioning the area to capture large-scale mobile international inward investment. Despite the progress made through this approach, a number of threats to Flintshire's future economic growth and prosperity remain.

Economic development policy

One of the earliest, and most successful, responses to the Shotton Steelworks closure, was the development of the Deeside Industrial Park. British Steel provided some 500 acres of land to the Welsh Development Agency (WDA) to develop as an industrial estate. This initial investment to create the industrial park acted as a positive catalyst for change and set the tone for all subsequent developments in the area. Businesses were incentivised to move to the area from elsewhere, with numerous firms taking advantage of an offer of three years' tenancy of small factories rent-free, and attracted to the site by major highways improvements and other enabling investments. Since it first opened, the Deeside Industrial Park has been very successful at attracting firms, including FDI, such as Toyota, which has had a large engine plant on the industrial park, covering some 115 acres, since 1992.

In the same vein, there is a continued policy emphasis on increasing employment levels in the area. The Deeside Enterprise Zone has been an important driver of growth in recent years. Enterprise Zone status has enabled Deeside to incentivise investment through an enhanced capital allowance, a business rates scheme, and support in accessing finance. Additional improvements to the wider business environment, including major investments in transport infrastructure and skills development have also taken place over recent years.

Sitting within the Enterprise Zone footprint, the private-sector led Northern Gateway development has been a particular focus of efforts to grow the economic base of Deeside most recently. The opportunity for this planned development came about following the closure of RAF Sealand in 2006. The masterplan for the Northern Gateway is for the development of some 1.7m sq. ft of industrial space, and 1,300 new homes. The development is being supported by £70m of enhanced capital allowances to support investment.

Future proposals include the Advanced Manufacturing Skills and Technology Centre, located on the Deeside Industrial Park, and an Aerospace Academy with links to Airbus. These are aimed at embedding more research and development activity in the area, by attracting new businesses, and supporting existing businesses to develop more localised supply chains. Activity is also



being focused on helping the local population to gain the skills they need to benefit from this growth – helping them to access new employment opportunities created at Deeside.

One of the potential threats to Deeside's long-term economic performance, is the vulnerability of the area to investment decisions made by management teams based overseas in foreign-owned companies. The current fear over the future of the Tata Steel site in Shotton, has brought this issue more clearly into focus. By supporting enhanced levels of innovation and R&D investment within Flintshire and neighbouring areas of the so-called Northern Powerhouse, local partners are seeking to develop a more resilient and diverse economic base, with a greater mix of both large and small firms.

Other economic development and regeneration efforts have focused on the communities of Flintshire. The Communities First programme has played a leading role in this. Within Flintshire, the programme has two main target areas: West Flintshire; and East Flintshire. Representing two of 52 Communities First sites across the whole of Wales, the initiative is designed to narrow the economic, education and skills, and health gaps between Wales' most deprived neighbourhoods and elsewhere.

Recognising the need to foster a more entrepreneurial culture locally, so as to reduce the dependence on large in-movers, the Flintshire Enterprise Club was set up in 2013, with funding from Communities First. Over a six-month period, a series of workshops was delivered, to support budding entrepreneurs to start a business, alongside networking opportunities, visits to successful businesses in the area, guest 'business champion' speakers, and opportunities to learn from the experience of those already in business.

More recently, as a strategically important employment hub for Flintshire and North Wales more generally, partners have collaborated to develop a long-term economic prospectus for Deeside. The document, which is currently being finalised, is intended to sharpen the focus for ongoing economic development activities, and add impetus to local and regional efforts to diversify and grow Deeside's economy.

Key lessons

Flintshire was hit hard by the closure of the Shotton Steelworks in the 1980s. Efforts designed to overcome the challenges presented by the closure focused initially on attracting FDI. This has delivered considerable employment growth and created a major industrial hub at Deeside. However, there is an increasing recognition that reliance on FDI alone is a high risk strategy. Tending to be footloose, and employing large numbers of people in a small number of businesses, Flintshire is potentially vulnerable to future economic shocks. The current uncertainty over the future of the Tata Steel presence in Deeside is testament to this.

As a result, initiatives have been developed to diversify the business base and make Flintshire more attractive as a place for businesses to grow and develop over the long-term. Increasingly Flintshire is seeking to compete on content as well as price. This approach includes a number of developments focused on Deeside: a new technology and skills centre; an aerospace academy; a business park focused on the aerospace supply chain; an extension to the existing industrial developments of Deeside – the Northern Gateway; an entrepreneurship programme, and the continued development of the strategic transport infrastructure.

In addition, there has been an emphasis on building an indigenous entrepreneurial spirit, through initiatives like the Flintshire Enterprise Club, in order to encourage the development of new businesses by local people. Again, it is hoped that these efforts will reduce Flintshire's exposure to economic shocks, and help to foster additional economic growth.



Crewe, England

Overview

Located in the Cheshire East Council area, Crewe is some 35 miles from Manchester, 50 from Liverpool, and 60 from Birmingham. In a very real sense, it is at the centre of the triangle which joins these three urban agglomerations together, and connectivity to and between these places was causal on Crewe's development. Indeed, the settlement of Crewe formally came into being in 1843, forming around the Crewe Railway station on the Grand Junction Railway line from Birmingham to Liverpool. The station soon became the site of the chief engineering works on the line, and a crucial part of the rail infrastructure linking London to Liverpool and Manchester.

For much of the last 150 years, the success of the railway was correlated directly with Crewe's own success. The growth in passenger volumes and freight were good to Crewe over the decades, with the call of many a conductor to 'All Change at Crewe' implicitly recognising the centrality of the station on the wider national rail network.

But over in the last 20 years in particular, as new models in the railway industry have come into being, the fates of Crewe and its railways have started to drift apart. Declining rail freight, brought about by the growth of road and air modes as alternatives, the loss of local engine/rolling stock building as procurement has internationalised, and the loss of place affiliations as new franchising models have been introduced have all meant that the connecting rod between rail success and Crewe's well-being has been seriously weakened. At the peak of the rail industry in Crewe in the 1930s, 20,000 people were employed in rail-related activities at the Crewe Works Engineering Facility. By the 2001 this had fallen to 1,000 and there are now under 300 employees remaining on-site.

And wider industrial restructuring in an economy too narrowly-based on the transport industry has meant high value jobs in engineering and manufacturing, both very closely associated the railways, have been replaced with lower value ones in service and public sector activities. In 1981 Crewe and Nantwich had a GVA per worker of £20,400, compared to £19,400 across Cheshire and Warrington. In 2012, the GVA/worker in the area was £32,800 compared with £36,000 for the wider sub region. Projections at 2015 suggest that the GVA/worker in Crewe and Nantwich is currently £34,800, compared to £38,700 for Cheshire and Warrington. As at 2015, the Crewe and Nantwich area had 108,700 residents.

Economic development policy

It was against this context of past and fading glories that Cheshire East Council commissioned SQW Ltd in 2010 to develop a new economic development strategy – All Change At Crewe – and provide a vision and strategic framework for developing the town and its surrounding economy through to 2030. All Change At Crewe intended to 'ensure the sustainable economic and growth of Crewe', this through five priority aims:

- Building the Knowledge Economy, its people, and its businesses
- Improving Crewe's connectivity and linkages, within the North West of England and nationally
- Unlocking Crewe's land and property development opportunities
- Improving local liveability, local transport, and local aspirations



- Finally, developing the area's quality, image, perceptions, and leadership capacity.

The process of strategy development was wide ranging and inclusive, and the formal arrival of the strategy and its action plan were met with considerable enthusiasm by politicians, residents, public sector agencies, and business.

Key lessons

In implementation, the process of strategy implementation has not been straightforward. Four learning lessons are apparent:

Shortly after the strategy's publication, it was announced that the North West Regional Development Agency, one of the strategy's key funders, was to be abolished. This created a very significant gap in the strategy's funding base, and considerable work was required subsequently to fill this. Learning Lesson: don't put too many funding eggs in too few baskets; rather, ensure that financial commitment to strategy and action is broadly based within the public and private sectors.

Shortly after strategy adoption, national plans were announced to bring High Speed rail to the Midlands and the North of England, with a potential HS2 station at Crewe. Building on the strategic emphasis given to connectivity in *All Change At Crewe*, Crewe was able to respond quickly and effectively with arguments to HS2 Ltd as to why an HS2 station at Crewe would be of national and regional benefit. Learning Lesson: opportunism is very much more effective when the associated underlying issues and strategic intents have been worked through and rehearsed.

In 2013, geological work had identified the potential for geothermal energy production in Crewe. Whilst *All Change At Crewe* had preceded any such idea, the thinking that the strategy had done around sectoral specialisation, and how to best work through proposals for diversification meant that there was an agreed protocol to responding to the geothermal opportunity, resulting in its relatively smooth progression. Learning Lesson: good strategy is about providing certainty and stability of the future, but at the same time providing the space and resilience to respond flexibly to breaking opportunities.

Crewe's work to progress its HS2 and geothermal opportunities has demanded extensive engagement with national government agencies. This has required local officers and council executives to 'step up to the plate' in terms of their ability to understand, negotiate with, and sometimes argue against national experts in government and organisations (such as Network Rail and HS2 Ltd). Learning lesson: strategy evidence and frameworks are necessary for success, but real sufficiency is often only provided by the capabilities and skills of individuals who can use these resources to push-on the key arguments.



Annex C: Consultee List

C.1 The following individuals have participated in the development of this Strategy.

Table C-1: Stakeholder consultations

Name	Organisation
Alastair Adair	Ulster University
Billy Ashe (Mayor)	Mid & East Antrim Borough Council
Brian Moreland	Moy Park
Carla Tully	AES
Clare O'Neil	Northern Regional College
Colin Potts	Dunbia
David Roberts	Invest Northern Ireland
Damian Martin	Department for Employment & Learning
Jackie Patton	Mid & East Antrim Borough Council
Janice Cherry	Carrickfergus Community Forum
Karen Hargan	Mid & East Antrim Borough Council
Kathleen McBride	Tourism Northern Ireland
Kelli Bagchus	Carrickfergus Enterprise
Ken Nelson	LEDCOM / Invest Northern Ireland
Mark Nodder	Wrightbus
Martin Robinson	Invest Northern Ireland
Melanie Christie-Boyle	Ballymena Business Centre
Mervyn Watley	Northern Ireland Science Park
Michelle Bell	Department for Employment & Learning
Moira Loughran	Invest Northern Ireland
Norman Apsley	Northern Ireland Science Park
Raymond Rusk	Michelin
Robert Logan (Cllr)	Mid & East Antrim Borough Council
Roy Craig	Larne Community Development Project
Scott Henderson	Terumo BCT
Seamus Anderson	Invest Northern Ireland
Stephen Kelly	Manufacturing Northern Ireland
Stephen Nicoll (Cllr)	Mid & East Antrim Borough Council
Steve Branken	Northern Regional College
Terry Robb	Ulster Bank North Business Centre / Ballymena BID
Walter Hutchinson	Department for Social Development
William McCaughey (Cllr)	Mid & East Antrim Borough Council



Stakeholder workshop attendees

C.2 Three stakeholder workshops were organised which brought together a range of public, private and voluntary sector organisations.

Table C-2: Stakeholder workshop attendees

Name	Organisation
Aidan Donnelly	Mid & East Antrim Borough Council
Ainsley McWilliams	Mid & East Antrim Borough Council
Alan Stewart	Ballymena Chamber of Commerce
Allister McComb	Advanced Engineering
Andrew McAlister	Mid & East Antrim Borough Council
Audrey Wales (Cllr)	Mid & East Antrim Borough Council
Austin Herron	Carrickfergus Community Forum
Brian Moreland	Moy Park
Carla Tully	AES
Carole Long	Mid & East Antrim Borough Council
Chris Wales	Ballymena Chamber of Commerce
Clare Mullan	Invest Northern Ireland
Clare O'Neill	Northern Regional College
Colin Potts	Dunbia
David Gillespie	LED COM
Deborah Neill	Larne Community Development
Derek Andrews	Invest Northern Ireland
Hazel Bell	Mid & East Antrim Borough Council
Irwin Armstrong	CIGA Healthcare Ltd
Jack Johnston	Broughshane & District Community Association
John Russell	Glenarm Organic Salmon Ltd
Karen Heggarty	Dunbia
Kelli Bagchus	Carrickfergus Enterprise (CEAL)
Ken Nelson	LED COM
Linda Williams	Mid & East Antrim Borough Council
Mark Nodder	Wrightbus
Melanie Christie-Boyle	Ballymena Business Centre
Mervyn Watley	Northern Ireland Science Park
Michelle Bell	Department for Employment & Learning
Moira Loughran	Invest Northern Ireland
Noel Williams	Carrickfergus Town Centre Partnership



Name	Organisation
Pat Mulvenna	Mid & East Antrim Borough Council
Paul Maguire (Cllr)	Mid & East Antrim Borough Council
Peter Doherty	Garage Door Systems Ltd
Peter Stewart	Greenisland Regeneration Group
Roisin Hughes	Ballymena BID
Rosemary McCormick	Mid & East Antrim Borough Council
Sandy Wilson	Broughshane & District Community Association
Sean Trainor	Mid & East Antrim Borough Council
Wendy Kerr	South Antrim Community Network
Wilber Moore	Moore Concrete Products Ltd

Councillor workshop attendees

C.3 An additional workshop was also held with elected members. The following Councillors attended this session.

Table C-3: Councillor workshop attendees

Name	Organisation
Audrey Wales (Cllr)	Mid & East Antrim Borough Council
Beth Clyde (Cllr)	Mid & East Antrim Borough Council
Billy Henry (Cllr)	Mid & East Antrim Borough Council
Declan O'Loan (Cllr)	Mid & East Antrim Borough Council
Maureen Morrow (Cllr)	Mid & East Antrim Borough Council
Noel Williams (Cllr)	Mid & East Antrim Borough Council
Paul Reid (Cllr)	Mid & East Antrim Borough Council
Robert Logan (Cllr)	Mid & East Antrim Borough Council
Ruth Wilson (Cllr)	Mid & East Antrim Borough Council
Stephen Nicholl (Cllr)	Mid & East Antrim Borough Council
William McCaughey (Cllr)	Mid & East Antrim Borough Council



Annex D: Baseline Data Resource

[Powerpoint Data Report provided separately]

