



<b>Contents</b>	<b>Page</b>
Executive Summary	4
1.0 Introduction	6
2.0 Regional Policy Context	6
3.0 Existing Development Plan	15
4.0 Economic Profile	21
5.0 Need for Future Employment Opportunities	30
6.0 Key Findings	39
7.0 Conclusion	40

## **Executive Summary**

This Position Paper aims to provide an overview of the employment and economic land baseline in the new Lisburn & Castlereagh City Council area and to consider the land requirements for economic development uses up to 2030.

Any future decision making will need to be made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to generate members' ideas on how planning can best meet the needs of a growing economic sector.

It is important to stress that in compiling the Position Paper the best information available has been used however it may need revised in light of the release of any new data (particularly in relation to the boundary of the new Council).

The paper will provide a foundation on which work can commence on Preferred Options Paper as part of introducing the new Plan Strategy for Lisburn & Castlereagh City Council to replace that contained in the existing Belfast Metropolitan Area Plan.

The aims of the paper are:

- To build the capacity of members to make informed planning decisions, particularly within the plan making context;
- To provide baseline information which will inform Development Plan policy making at local level;
- To assess the land use needs of a growing employment and economic sector in the Lisburn & Castlereagh City Council area; and

- To link with important ongoing work in relation to the development of a Community Plan and other strategic work being undertaken by the Council.

## **1.0 INTRODUCTION**

- 1.1 This paper examines the employment/industrial requirements for the new Lisburn & Castlereagh City Council area. This involves an assessment of both existing employment land developed and employment land undeveloped. The need for any additional employment zonings up until 2030 is then considered.
- 1.2 The paper sets out the regional context for economic development, which allows members to consider how economic policy may be formulated within the context of the Regional Development Strategy (RDS) and regional planning policy.
- 1.3 This is followed by an assessment of the existing Development Plan context including employment/industrial zoned land and extent of past take up.
- 1.4 An overview of the economic profile and employment base of the new Council area is followed by an evaluation of the need for future employment opportunities, providing an indication of how many jobs are required to cater for a growing population and how these jobs can be accommodated across the new Council District up to 2030.
- 1.5 Information has been derived from the Northern Ireland Statistics and Research Agency (NISRA), DOE Planning (Statistics and Surveys), the Electoral Office NI and other sources where specified.

## **2.0 REGIONAL POLICY CONTEXT**

- 2.1 The regional policy context is provided by the Regional Development Strategy (RDS) 2035 and regional Planning Policy Statements (PPSs). A summary of these documents as they relate to plan making and economic development policy is provided in the following paragraphs.

## **Regional Development Strategy 2035 (RDS)**

- 2.2 The Regional Development Strategy 2035 (RDS) provides a framework for strong sustainable economic growth across the region and recognises that a growing regional economy needs a co-ordinated approach to the provision of services, jobs and infrastructure. It provides Strategic Guidance (consisting of Regional Guidance (RG) and Spatial Framework Guidance (SFG)) to ensure an adequate supply of land to facilitate sustainable economic growth. The Spatial framework recognises the role of the Belfast Metropolitan Urban Area (BMUA) as the major driver for regional growth and the importance of hubs and clusters as the main centres for employment and services. Land should be accessible and located to make the best use of services, for example water and sewerage infrastructure, whilst avoiding, where possible, areas at risk of flooding from rivers, the sea or surface water run-off.
- 2.3 The RDS (RG1) states that the quality and viability of sites zoned for economic development uses in Area Plans should be assessed against an 'Employment Land Evaluation Framework' (Table 1) which will enable planning authorities to identify robust and defensible portfolios of both strategic and locally important employment sites in their development plans. This means protecting zoned land in development plans and, in order to capitalise on the development opportunity provided by a concentration of people, goods, available infrastructure and business, promoting economic development opportunities across the region focused on the BMUA and the Hubs.

**Table 1: RDS 2035 Employment Land Evaluation Framework**

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

2.4 A substantial part of the new Lisburn & Castlereagh City Council area is contained within the BMUA hub<sup>1</sup>. The RDS (SFG1) specifically

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

recognises the important role of Lisburn in the BMUA and its location at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor. It states that potential exists to grow the retail offer and create high quality offer through the creation of employment in business services. Potential also exists to generate a new driver for the night-time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh (which is recognised as a site of regional significance.)

2.5 The RDS (SFG13) also recognises the importance in sustaining rural communities by facilitating the development of rural industries, businesses and enterprises in appropriate locations. This means not only businesses connected to farming, forestry and fishing but other industries such as recreation, tourism and renewable energy which can provide further jobs and opportunities in rural areas as long as they are integrated appropriately within a settlement or rural landscape.

2.6 Development Plans must 'take account' of the RDS. The RDS seeks to protect zoned land (RG1); promote economic development opportunities focused on the BMUA, Londonderry and Hubs (SFG1, SFG4 and SFG11); and provide a network of economic development opportunities which makes provision in Development Plans for an adequate and continuous supply of land for employment purposes (RG1).

#### **PPS 4 Planning and Economic Development**

2.7 The RDS is complemented by the DOE's Planning Policy Statements (PPSs), the most relevant of which is PPS 4 Planning and Economic Development. This PPS sets out the Department's policies for economic development uses and indicates how growth associated with such uses can be accommodated and promoted in development plans. Its remit covers industrial, business and storage and distribution uses as

currently defined in Part B “Industrial and Business Uses” of the Planning (Use Classes) Order (NI) 2015.<sup>2</sup>

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

2.9 The policy objectives of PPS 4 are:

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

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<sup>2</sup> Part B of the Use Classes Order 2015 subdivides industrial and business uses into 4 classes: B1: Business; B2: Light Industrial; B3: General Industrial; and B4: Storage and Distribution.

## **Role of Development Plans**

2.10 PPS 4 details particular matters that can be assessed in the course of preparing a development plan. The following matters should be assessed as appropriate:

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

## **Draft Strategic Planning Policy Statement (SPPS)**

2.11 The SPPS, will eventually replace existing PPSs (once the Council has its Plan Strategy in place). Until then they will remain a material consideration. The draft SPPS was issued for consultation in February 2014 and the final draft completed in March 2015. The draft SPSS does not introduce any significant changes to economic development policy. One of the main aims of the SPSS in relation to economic development is to achieve further sustainable development through a sustainable economy. The draft SPSS sets regional policy objectives for economic development which are to:

- Promote sustainable economic development in an environmentally sensitive manner;

- Tackle disadvantage and facilitate job creation by ensuring the provision of a generous supply of land suitable for economic development and a choice and range in terms of quality , size and location;
- Sustain a vibrant rural community by supporting rural economic development of an appropriate nature and scale;
- Support the re-use of previously developed economic development sites and buildings where they meet the needs of particular economic sectors;
- Promote mixed-use development and improve integration between transport, economic development and other land uses, including housing; and
- Ensure a high standard of quality and design for new economic development.

## **Role of Local Development Plans**

2.12 The draft SPPS identifies the role for LDPs as follows:

- to ensure that there is an ample supply of suitable land available to meet economic needs on a range and choice of sites in terms of size and location to promote flexibility. Account should also be taken of factors such as accessibility by all members of the community, availability of adequate infrastructure, specialised needs of specific economic activities, potential environmental impacts and compatibility with nearby uses.
- LDPs should also where possible seek to identify previously developed land for economic development, to assist in reducing the need for green field development.
- LDPs should identify opportunities for mixed use development and indicate through key site requirements the types of economic development that will be acceptable;
- Where appropriate, LDPs should specify the type or range of economic development uses that will be acceptable within zoned sites or broader areas identified in the Plan;

- LDPs should normally contain a number of supporting actions to assist in meeting the needs of business enterprises to deliver sustainable and high quality development.

## **Planning Strategy for Rural Northern Ireland**

- 2.13 Prior to the publication of PPS 4 the prevailing planning policy for development in rural Northern Ireland was a Planning Strategy for Rural Northern Ireland. Although much of this document has been superseded by PPSs, there are parts that deal with employment and economic development that have not been. Policies IC 16 and IC 17 are superseded in part by PPS4 but remain applicable in so far as they relate to office facilities providing financial, professional and other services. With respect to such uses, the policy seeks to facilitate development in town centres or appropriate locations. The Rural strategy requires that sufficient land to meet the anticipated needs of the community, in terms of health and education and other public facilities will be provided (Policy PSU 1).

## **Anti-Poverty and Social Inclusion Strategy**

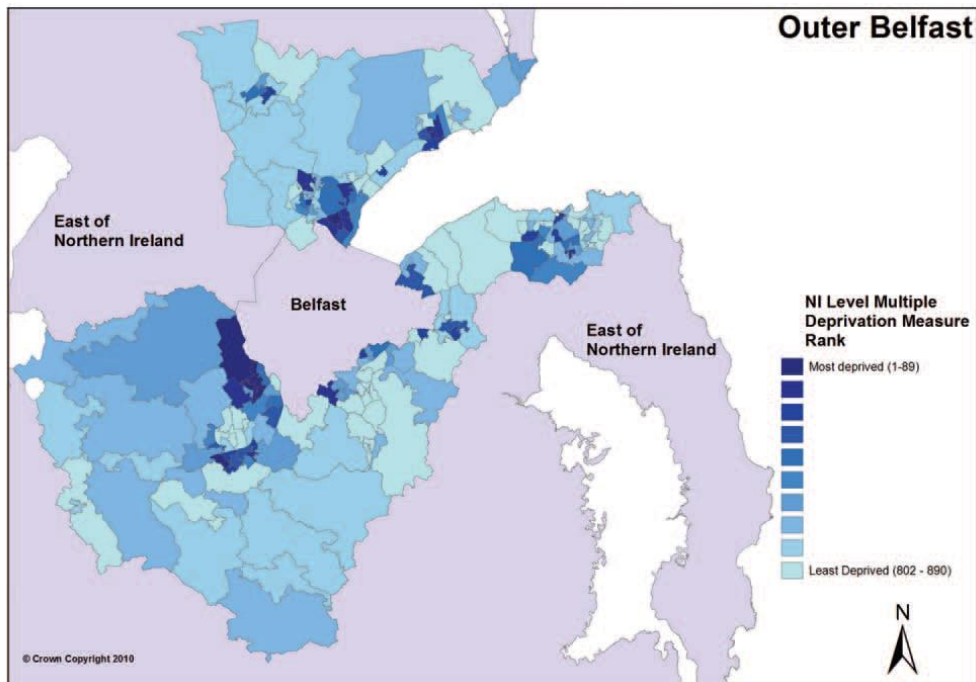
- 2.14 The Government's "Anti-Poverty and Social Inclusion Strategy" (Lifetime Opportunities) was published by the Office of the First minister and Deputy First Minister in 2006. It outlines a set of long-term goals and targets to work towards eliminating poverty and social exclusion in Northern by 2020. Public Policy in general is expected to take account of anti-poverty/social inclusion considerations, for example through enabling disadvantaged groups and communities to benefit from better access to employment opportunities. One of the main functions of a development plan is to facilitate development and create a land use framework that will allow investment to take place. For instance, the re-use of previously developed land has an important role to play not only in the supply of sites for economic development, but it can also support the Anti-Poverty and Social Inclusion Strategy, and assist with economic regeneration and physical renewal. This can help to stimulate enterprise

in the most disadvantaged areas in order to tackle long-term unemployment and issues of employability.

2.15 The Government commissioned the Northern Ireland Multiple Deprivation Measure (NIMDM 2005) to identify small area concentrations of multiple deprivation across Northern Ireland.

2.16 Policy needs to focus on the most persistently and acutely deprived areas through Neighbourhood Renewal. The Local Development Plan should assist in identifying where deprivation exists and develop policies to address it.

**Figure 1: Northern Ireland Multiple Deprivation Measure, Outer Belfast wards, 2010**



Source: NISRA

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

2.17 The Northern Ireland Economic Strategy was published by the Minister for Enterprise Trade and Investment in March 2012. The overarching

goal of the Strategy is to improve the economic competitiveness of the Northern Ireland economy. For the purpose of achieving that goal, the Strategy has focused on creating a larger and more export-driven private sector, a move away from an economy that has traditionally been dependent on the public sector. The readdressing of this imbalance is to be done through encouraging innovation and research and development, improving skills, establishing a sustainable economic infrastructure, competing in a global market place and encourage growth in existing local companies.

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

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

2.19 While it is the responsibility of many Departments to implement the Economic Strategy, these particular goals are areas in which land use planning can have an active part in ensuring their delivery.

### **3.0 EXISTING DEVELOPMENT PLAN**

#### **Belfast Metropolitan Area Plan 2015 (BMAP)**

3.1 The Belfast Metropolitan Area Plan 2015 is a development plan prepared under the provisions of Part 3 of the Planning (Northern Ireland) Order 1991 by the Department of the Environment (DOE). The Plan covers the City Council areas of Belfast and Lisburn and the Borough Council areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. The Plan was adopted on 9<sup>th</sup> September 2014.

- 3.2 Volume 3 and Volume 5 of BMAP 2015 sets out policies on the former Lisburn and Castlereagh Districts respectively (“District Proposals”). These policies have been developed in the context of the Plan Strategy and Framework contained in Volume 1 of the Plan and are in general conformity with the RDS.
- 3.3 Within BMAP 2015 the settlement hierarchy in Lisburn District consists of Lisburn City, Metropolitan Lisburn, the small towns of Moira and Hillsborough, 12 villages and 30 small settlements as identified in Designation SETT 1 in Part 3, Volume 1 of the Plan (Table 3.1). The District Proposals designate Settlement Development Limits and sets out designations, policies, proposals and zonings for individual locations within these settlements in accordance with the BMA Settlement Strategy. (Please note that Edenderry has now moved into the Belfast Local Government District from April 2015.)
- 3.4 Within BMAP 2015 the settlement hierarchy in Castlereagh consists of Metropolitan Castlereagh, the town of Carryduff, the village of Moneyreagh and the small settlements of Ballyknockan, Crossnacreevy, and Ryan Park as identified in Designation SETT 1 in Part 3, Volume 1 of the Plan. (Please note that Loughview has now moved into the Belfast Local Government District from April 2015.)

**Table 3.1: Settlement Hierarchy for Lisburn & Castlereagh City Council District within BMAP 2015**

Settlement Hierarchy	Lisburn	Settlement Hierarchy	Castlereagh
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<b>City</b>	Lisburn	<b>Metropolitan</b>	Metropolitan Castlereagh
<b>Towns</b>	Hillsborough and Culcavy Moira	<b>Towns</b>	Carryduff
<b>Villages</b>	Aghalee Annahilt Dromara Drumbeg Drumbo Glenavy Lower Ballinderry Magheraberry Milltown Ravernet Stoneyford Upper Ballinderry	<b>Villages</b>	Moneyreagh
<b>Small Settlements</b>	Ballyaughlis Ballycarn Ballylesson Ballynadolly Ballyskeagh Boardmills Carr Drumlough Drumlough Road Dundrod Duneight Edenderry Feumore Halfpenny Gate Halftown Hillhall Kesh Bridge Lambeg Legacurry Long Kesh Lower Broomhedge Lurganure Lurganville Lurgill Magheraconluce Morningside Purdysburn St. James The Temple Tullynacross Upper Broomhedge	<b>Small Settlements</b>	Ballyknocken Crossnacreevy Ryan Park

### **Employment zonings within BMAP 2015**

3.5 BMAP 2015 designates a number of locations within Lisburn City (LC), Metropolitan Lisburn (ML), Metropolitan Castlereagh (MCH) and Carryduff (CF) as suitable for employment/industrial zones. The uptake

of land zoned for existing employment/industrial use is contained within Table 3.2 below. In addition Table 3.3 sets out the new employment zonings identified in BMAP including the two major employment locations of West Lisburn/Blaris (LC05) and Purdysburn Major Employment Location (MCH13). BMAP also designates the Maze Lands as a Strategic Land Reserve of Regional Importance (LN08).

**Table 3.2: Existing employment zonings BMAP 2015**

<b>BMAP Existing Employment Zoning and Location</b>	<b>Total Area Zoned (Hectares)</b>	<b>Area Developed/Committed (Hectares)</b>	<b>Area Remaining (Hectares)</b>
LC10 Blaris Industrial Estate, Altona Road	25.23	25.23	0
LC11 Enterprise Crescent, Ballinderry Road	13.19	13.19	0
LC12 Ballinderry Road	7.43	7.43	0
LC13 Flush park Industrial Estate, Knockmore Road/Moira Road	8.47	7.07	1.4
LC14 Lissue Industrial Estate, Moira Road	52.82	52.82	0
LC15 Coca cola Plant, Lissue Road	18.47	18.47	0
ML05 Seymour Hill Industrial Estate	10.80	10.80	0
ML06 Dunmurry & Derriaghy Industrial estate	44.54	44.54	0
MCH07 Newtownbreda Factory Estate,	1.2	1.2	0

Cedarhurst Road			
MCH08 Cedarhill Industrial Estate, Beechill Road	2.0	2.0	0
CF07 Cyril Johnstone & Co Ballynahinch Road	2.2	2.2	0
CF08 Carryduff Business Park Comber Road	5.1	5.1	0
CF09 Saintfield Road, Carryduff	3.8	3.8	0
CF10 Eastbank Road, Carryduff	2.0	1.4	0.6
CF11 Edgar Industrial Estate	6.73	6.73	0

**Table 3.3: Uptake of land zoned for employment BMAP 2015**

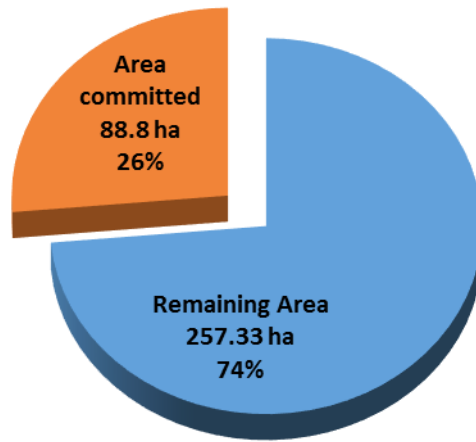
<b>BMAP proposed Employment Zoning and Location</b>	<b>Total Area Zoned (Hectares)</b>	<b>Area Developed/Committed (Hectares)</b>	<b>Area Remaining (Hectares)</b>
LC05 West Lisburn/ Blaris Major Employment Location	119.48	0	119.48
LC06 Knockmore/Lissue Road	3.09	0	3.09
LC07 Lissue Road	14.34	0	14.34
LC08 Barbour Threads Mixed Use	5.53	5.53	0

LC09 Ballinderry/Knockmore Road	44.3	44.3	0
GY05 Land north west of Gobraha Road, Glenavy	6.27	0	6.27
MCH05 Land SE of Millmount/Comber Road	9.27	0	9.27
MCH06 Land at Upper Newtownards/Carrowreagh Road	34.93	34.93	0
MCH12 Forster Green Hospital, Upper Knockbreda Road	2.54	2.54	0
MCH13 Purdysburn Major Employment Location, Saintfield Road	85.54	0	85.54
CF05 Ballynahinch Road, Carryduff	11.74	1.5	10.24
CF06 Comber Road, Carryduff	5.55	0	5.55
DA05 Land South of Woodvale, Rathfriland Road, Dromara	3.55	0	3.55
<b>Total</b>	<b>346.13</b>	<b>88.8</b>	<b>257.33</b>

Source:DOE Planning Statistics 2015

**Figure 2: BMAP Employment Zones Remaining**

## BMAP Employment Zones Remaining



Source: DOE Statistics Branch re planning applications committed on employment land (March 2015).

## 4.0 ECONOMIC PROFILE

### Lisburn & Castlereagh City Council Economic Development Priorities

4.1 The Council's overarching Economic Development priorities (as set out in the Council's Corporate Plan 2015/2017, Theme 2) are to develop 'strong and sustainable economy and growth'. The Council is well positioned for cross border logistics with modern industrial premises, a strong local support network and a highly skilled workforce.

4.2 Under this theme the Council's main objectives are to:

- Support economic development through working with local businesses to help identify and address issues and to capitalise on future opportunities;
- Identify and safeguard adequate land for economic and industrial development through the Local Development Plan;

- Engage with regional, national and European organisations to attract and optimise funding opportunities to support the area;
- Deliver regeneration projects that are in the pipeline, including the **Castlereagh Urban Integrated Development Framework** and the **Lisburn City Centre Masterplan**;
- Enhance business development by profiling the area as a place to visit and do business, encouraging social enterprise. Utilising our strategic location we will work with partners to develop initiatives that attract investment, business and jobs to the region. Businesses have an important role to play in maintaining the vibrancy and distinctiveness of local areas, making them attractive for residents and visitors alike, and are a key factor in the quality of life for residents;
- Develop a sustainable Rural Economic Development Plan with our strategic partners. This will be achieved through the expansion and promotion of the region's existing rural business sectors with a co-ordinated focus on innovation and the development of new market opportunities. Rural development initiatives will also continue to showcase the region's rich rural heritage, develop the area's rural tourism sector and generate additional visitor spend through the exploitation the Council's strategic location;
- Develop, market and implement a Tourism Strategy including a major events strategy to take advantage of the fact that some of Northern Ireland's most high-profile events take place within the Council area, including the Ulster Grand Prix, the Lisburn Half Marathon and the Festival of Racing at the prestigious Down Royal Racecourse;
- Develop an Economic Vision that will include initiatives aimed at upskilling in the industry sectors and developing professional services

using Council's enhanced powers to expand Business Renewal and Neighbourhood Renewal Funding and the delivery of programmes with Strategic Partners across the area to deliver positive change and ensure successful regeneration.

### **West Lisburn Development Framework**

- 4.3 The Council's West Lisburn Development Framework (WLDF) proposes the extension of Lisburn City to the Southwest, covering an area consisting of predominantly agricultural lands. The lands within the boundary include Knockmore/Lissue, Blaris, Sprucefield, Lisburn Golf Course, part of Culcavey, Halftown, Kesh Bridge, Long Kesh, Lurganure, Maze Long Kesh (MLK) and Down Royal Racecourse covering an area of approximately 1,416 hectares. In the latest final draft of the WLDF the study area was widened to the west to include both the Maze Site of Regional Significance, Maze Racecourse and northwards to include Knockmore/Lissue Industrial area.
- 4.4 The vision for the West Lisburn Area is:  
*"To realise the potential of the West Lisburn area by 2035 through setting a framework that recognises and promotes the regionally significant features contained therein and connects these features in a sustainable manner that will promote social and economic growth and prosperity for the entire region."*
- 4.5 The Framework Strategy is to grow Lisburn city in a south-westerly direction in order to take advantage of the unique locational setting of these lands at the junction of Northern Ireland's two main transport corridors, the M1 and A1. The plan will capitalise upon the potential of the significant features of West Lisburn, including the Maze Long Kesh lands, Blaris lands, Sprucefield, Knockmore/Lissue, Down Royal Racecourse and the River Lagan.

- 4.6 The WLDF indicates proposed zonings for land uses for the period 2015-2035. To achieve the vision the following 8 objectives are identified:
- **Objective 1** *Prioritise the development of the Knockmore Link Road as the key piece of infrastructure required to unlock the development potential of West Lisburn;*
  - **Objective 2** *Improve existing and develop new integrated multi-mode transport infrastructure into and throughout West Lisburn;*
  - **Objective 3** *Promote new and expand existing employment uses in the West Lisburn area;*
  - **Objective 4** *Promote and encourage appropriate development at the Maze Long Kesh site to reflect its status as a ‘Strategic Land Reserve of Regional Importance’;*
  - **Objective 5** *Encourage the development of new residential development to support growth in the area, whilst respecting existing settlements;*
  - **Objective 6** *Protect and enhance significant and valuable landscape areas and waterways;*
  - **Objective 7** *Protect and enhance the ‘Regional Significance’ of Sprucefield and expand its retailing role;*
  - **Objective 8** *Increase sport, recreation and leisure activity in the West Lisburn area, with a particular focus on the River Lagan corridor.*
- 4.7 Proposed zonings include a proposed extension to the Strategic Open Space at Lagan Riverside Park connecting the area with the city core. Other zonings include various uses such as enterprise zones at the Maze/Long Kesh Site of Strategic Importance, residential development, business park and a general industrial area on the Blaris lands.
- 4.8 It is proposed to locate residential development close to the proposed employment zoning on the Blaris site. Suitable land uses within the employment zoning will include classes B1a, b and c (i.e. office, call centre, R&D), B2 (light industry) and B4 (storage and distribution) and

car showrooms. Development consisting of use classes B1a, b and c will be located to the portion of the zoning to the west of the Knockmore Link Road, with use classes B2 and B4 located to lands to the east of the Knockmore Link Road. The portion to the south of the zone along the M1 is to have a high profile frontage with gateway buildings at the M1-Knockmore Link Road junction.

4.9 A number of key transport linkages are proposed within the area, as follows:

- Delivery of the Knockmore Link Road;
- Provide direct access into Maze Long Kesh site from M1;
- Delivery of local distributor roads;
- Improve infrastructure and connections to and within Knockmore/Lissue lands;
- Provide infrastructure to and within Blaris lands;
- Provide sufficient infrastructure to and within Maze Long Kesh for future development;
- Delivery of West Lisburn train halt;
- Key Pedestrian/Cycle Linkages are proposed between the proposed West Lisburn Rail Halt/park and Ride (800m to north).

4.10 The plan indicates around 400 hectares of land between the A1 and the River as a Rural Landscape Wedge. It consists of floodplain, high quality agricultural land and historic and recreational landscapes. The purpose of this wedge is to:

- prevent the coalescence of the Lisburn urban area with the Maze Long Kesh lands and Hillsborough
- maintain the identity of Halftown village and
- to limit the northerly expansion of Hillsborough/ Culcavy
- maintain high quality landscapes and agricultural lands

4.11 The western part of the Blaris development lands is significant in terms of its function as both a site and city edge. In this context, the treatment

of this edge should be memorable, and distinct yet relate to the character of the existing landscape. The character of the planting bounding this area should define the western edge of a large entry space.

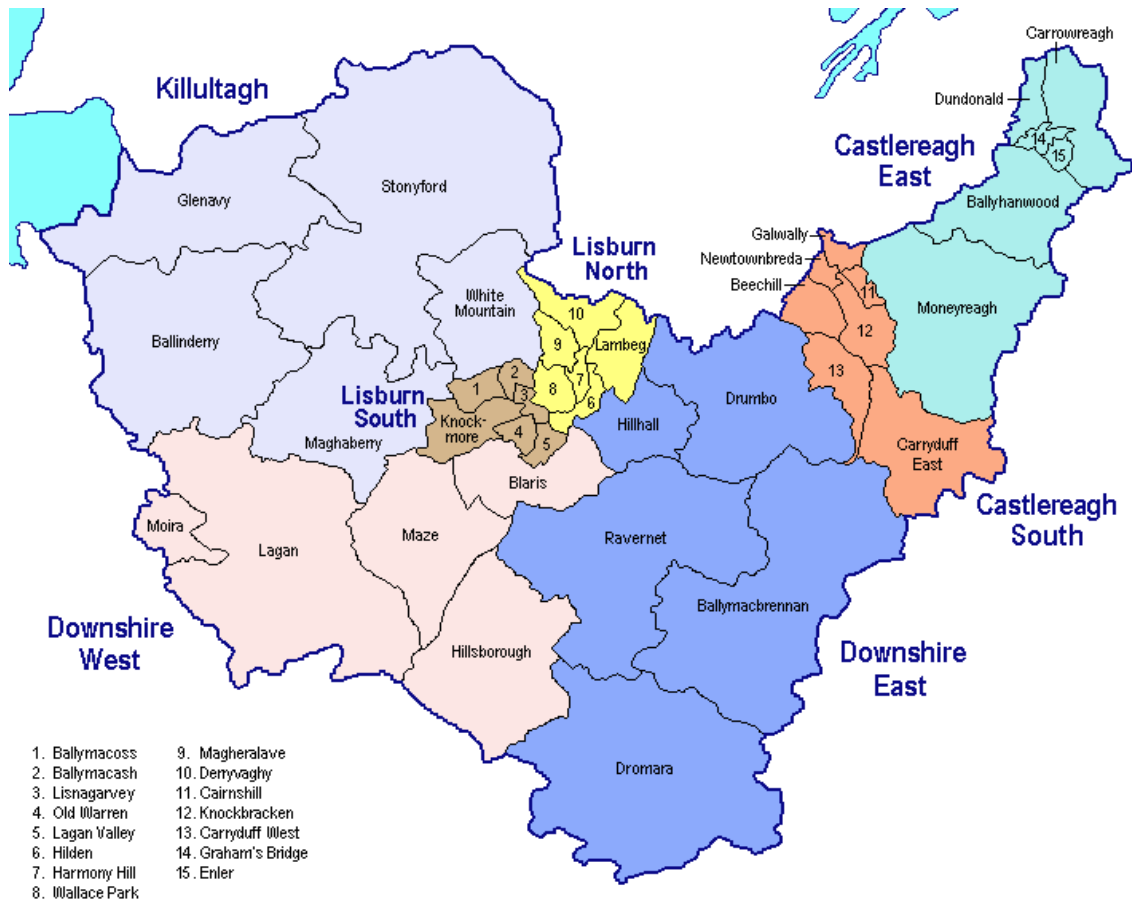
- 4.12 Given the topography of the site and the range of development proposed, extensive excavation of soil may be required. It is recommended that this excavated material be retained within the development area and used for proposed mounds around the industrial units. A clear strategy for the creation and planting of berms is required.
- 4.13 There are existing pylons traversing the area. The site layout has been designed to avoid conflict with this feature wherever possible. Open space areas on the plateau and business park area run below the pylons.
- 4.14 The WLDF proposes that the development of the area is realised in 4 distinct phases over a period of more than 15 years. Phase 1 covers the first 7 years and includes the delivery of the Knockmore Link Road and the preparation of a Local Development Plan including recommended zonings. Phases 2 to 4 consist mainly of various infrastructural improvements throughout the area, improving accessibility and enabling further development to take place. The preparation of a masterplan/strategy for development at Sprucefield is included within Phase 2.
- 4.15 More information on the WLDF can be found on the Council's website at the following link: [www.lisburncastlereagh.gov.uk](http://www.lisburncastlereagh.gov.uk)

## **Population Lisburn & Castlereagh City Council Area**

- 4.16 The new Lisburn & Castlereagh City Council area comprises the former districts of Lisburn City and Castlereagh Borough Districts save for

certain wards which transferred over to the Belfast City Council which included the localities of Gilnahirk, Tullycarnet, Braniel, Castlereagh, Merok, Cregagh, Wynchurch, Glencregagh and Belvoir, Collin Glen, Poleglass, Lagmore, Twinbrook, Kilwee and Dunmurry.

**Figure 3: The new Lisburn & Castlereagh City Council Area**



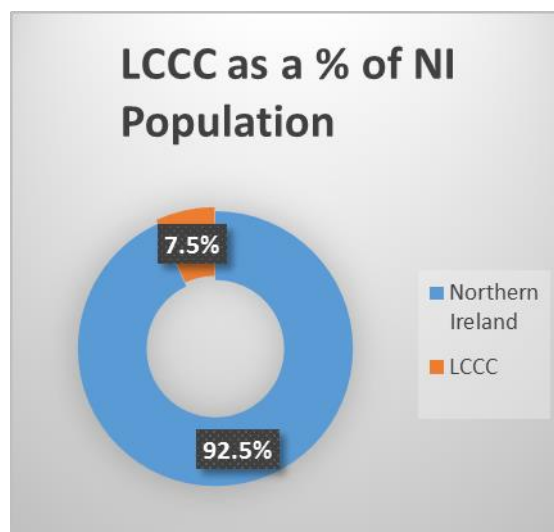
4.17 In total, 53,083 persons that were formally in Lisburn and Castlereagh Districts, transferred to the new Belfast District, i.e. approximately 21% of the Lisburn population and 38% of Castlereagh. Based on NISRA population statistics (Table 4.1) the total population of the new Lisburn & Castlereagh City Council area will be approximately **136,808** making it the ninth in population ranking out of the eleven new councils.

**Table 4.1 Population of new Council Areas Northern Ireland 2014**

Total NI Population	New Local Government Districts	Population of District
<b>1,829,725</b>	Belfast	335,133
	Armagh, Banbridge and Craigavon	203,757
	Newry, Mourne and Down	174,829
	North Down and Ards	157,640
	Derry and Strabane	148,632
	Causeway Coast and Glens	141,699
	Mid Ulster	141,329
	Antrim and Newtownabbey	139,536
	<b>Lisburn and Castlereagh</b>	<b>136,808</b>
	Mid and East Antrim	135,997
	Fermanagh and Omagh	114,365

Source: NISRA mid-year population estimates 2013

**Figure 4: Population of Lisburn & Castlereagh City Council Area**



Source: NISRA Census 2011

### Population Projections

4.18 The following population estimates for Lisburn & Castlereagh City Council area are shown in Tables 4.1 and 4.2 below:

**Table 4.1: Population Projections for Lisburn & Castlereagh City Council District - 2008-2030**

	2008	2010	2015	2020	2023	2025	2030
<b>Northern Ireland</b>	1,779,200	1,804,800	1,851,57*	1,900,393*	1,926,972*	1,942,704*	1,974,611*
<b>Lisburn &amp; Castlereagh</b>	130,600	133,900	139,888*	146,162*	149,880*	152,244*	157,343*

Source: NISRA \*2012-based population projections for areas within Northern Ireland were published on 30 October 2014.

4.19 The corresponding household projections from 2015 which take account of population growth, a reduced size of household and the changing age structure of the population, could lead to an increase from 55,000 to 63,000 in the number of households by 2030. The average household size in N Ireland has been projected to steadily decrease to 2.34 people per household in 2023. In Lisburn & Castlereagh the average size of households is predicted to remain below the NI average at 2.17%.

**Table 4.2: Household Projections for Lisburn & Castlereagh City Council District**

	2015	2020	2023	2025	2030
<b>Northern Ireland</b>	721,860*	743,460*	757,946*	768,279*	789,858*
<b>Lisburn &amp; Castlereagh</b>	54,868*	57,494*	59,194*	60,395*	62,967*

Source: NISRA

\*NISRA 2012-based household projections were published on 26 March 2015.

4.20 Whilst the economic climate that has prevailed since 2007 has impacted on the demand for development land, there are indications that a slow recovery in the economy is underway. It is therefore important that there is adequate availability of development land to increase choice and flexibility and thus stimulate investment.

## The Existing Employment Base

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

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

**Table 4.3 Employee Jobs by Industry 2011**

	Total No of Jobs	% Jobs in Manufacturing	% Jobs in Construction	% Jobs in Services
<b>NI</b>	681,641	10.9%	4.8%	83.1%
<b>Lisburn</b>	37,189	14.2%	6.4%	78.7%
<b>Castlereagh</b>	24,475	7.1%	3.2%	89.0%
<b>Total</b>	61,664	11.4%	5.1%	82.8%

*Source: DETI District Council Briefings November 2013. Employee jobs by Industry, September 2011 (Northern Ireland Census of Employment 2011) & NISRA Employee Jobs (administrative geographies)*

4.23 The highest percentage of jobs in Lisburn & Castlereagh Districts in 2011 was in the service sector which was similar to the NI trend. Lisburn District stands out as having a higher percentage of jobs in manufacturing (14.2%) and construction (6.4%) than the NI average of 10.9% and 4.8% respectively. This can be attributed to companies such

as Hinnias, Coca Cola and McGrath Steel. Castlereagh District has lower proportions of jobs in manufacturing and construction than Lisburn District but it has the highest level in services at 89% compared to Lisburn District at 78.7%.

**Table 4.4 Economic Activity of the Population (16-74 age group) – 2011**

	All usual residents: (16-74 age group)	Economically active: Total:	Economically active: Employee: Part-time:	Economically active: Employee: Full-time:	Economically active: Self-employed:	Economically active: Unemployed:	Economically active: Full-time student:
	(%)	(% of all usual residents)	(% of economically active total)	(% of economically active total)	(% of economically active total)	(% of economically active total)	(% of economically active total)
<b>Northern Ireland</b>	1,313,420	869,767	172,138	467,805	116,666	65,196	47,962
	100%	66.22%	13.11%	35.62%	8.88%	4.96%	3.65%
<b>Lisburn</b>	86,371	59,061	12,103	33,223	7,183	3,528	3,024
	100%	68.38%	14.01%	38.47%	8.32%	4.08%	3.5%
<b>Castlereagh</b>	48,551	33,982	6,752	20,493	3,421	1,585	1,731
	100%	70%	13.91%	42.21%	7.05%	3.26%	3.57%

Source: NISRA Census 2011 Economic Activity: KS601NI (administrative geographies)

**Table 4.4A Economic Activity of the Population (16-74 year olds) – 2011 for the new Lisburn & Castlereagh Council District**

	All usual residents:	Economically active: Total:	Economically active: Employee: Part-time:	Economically active: Employee: Full-time:	Economically active: Self-employed:	Economically active: Unemployed:	Economically active: Full-time student:
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	(%)	(% of all usual residents)	(% of economically active total)	(% of economically active total)	(% of economically active total)	(% of economically active total)	(% of economically active total)
<b>Northern Ireland</b>	1,313,420	869,767	172,138	467,805	116,666	65,196	47,962
	100%	66.22%	13.11%	35.62%	8.88%	4.96%	3.65%
<b>Lisburn &amp; Castlereagh</b>	97,837	68,902	13,459	40,532	8,404	3,205	3,302
	100%	70.44%	13.76%	41.43%	8.59%	3.28%	3.38%

Source: NNIS, NISRA – Census 2011 Economic Activity: KS601NI (administrative geographies)

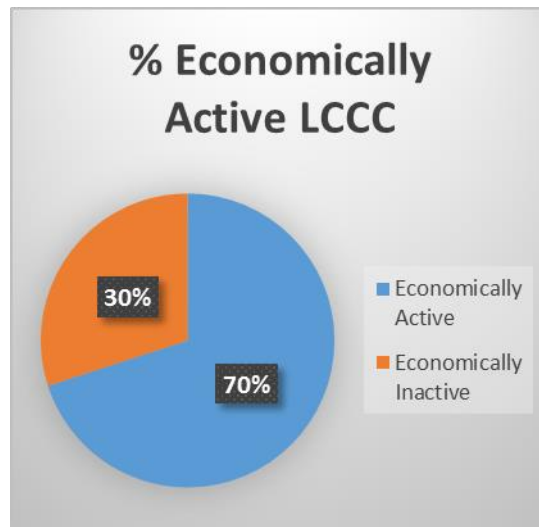
**Table 4.5 Composition of the Economically Active, aged 16 – 74 years, for the new Lisburn & Castlereagh Council District, Census 2011**

	All usual residents, aged 16-74	Part-time employee (%)	Full-time employee (%)	Self-employed (%)	Unemployed (%)	Full-time student (%)
<b>Northern Ireland</b>	1,313,420	13.1	35.6	8.9	5.0	3.7
<b>Lisburn &amp; Castlereagh</b>	97,837	13.8	41.4	8.6	3.3	3.4

Source: NNIS, NISRA (2014 Table S601NI. Note: Percentages are based on all usual residents aged 16-74 years.

4.24 Two thirds (66 %) of residents in Northern Ireland aged 16-74 years were economically active in the week before Census Day 2011. The remainder (34%) were classified as economically inactive. The corresponding figures for Lisburn and Castlereagh LGDs are economically active (70%) and economically inactive (30%). The highest proportion of full-time employees live in Lisburn and Castlereagh LGD (41% of residents aged 16-74) and the situation relating to part-time employment is similar (14% of residents aged 16-74).

**Figure 5: Percentage of Economically Active in Lisburn & Castlereagh City Council**



**Table 4.6 Composition of the Economically Inactive, aged 16-74, for the new Lisburn & Castlereagh City Council District, Census 2011**

	All usual residents aged 16-74	Retired (%)	Student (%)	Looking after home or family (%)	Long-term sick or disabled (%)	Other (%)	Total (%)
<b>Northern Ireland</b>	1,313,420	12.9	6.2	4.5	7.3	2.9	33.8
<b>Lisburn &amp; Castlereagh</b>	97,837	14.2	5.2	3.4	4.6	2.2	29.6

Source: NNIS, NISRA (20140 Table S601NI. Note: Percentages are based on all usual residents aged 16-74 years.

4.25 On Census Day 2011, the smallest proportion of economically inactive residents in Northern Ireland were recorded in Lisburn and Castlereagh LGD (29.6%).

**Table 4.7 Car or Van availability for the new Lisburn & Castlereagh City Council District, Census 2011**

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

Source: NINIS, NISRA (2014) TABLE KS405NI

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

### Skills Profile

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

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

**Table 4.8 Level 4+ Qualifications (and no qualifications), aged 16 and over for the new Lisburn & Castlereagh City Council District, Census 2011**

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

Source: NINIS, NISRA (2014) TABLE KS501NI

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

## **5.0 NEED FOR FUTURE EMPLOYMENT OPPORTUNITIES**

5.1 Lisburn City Council undertook several economic studies of the district from 2010 to 2015. The report “**Lisburn City Council Area (2010-2020) Socio Economic Profile and Economic Forecast Report**” was prepared by Oxford Economics in 2011. A summary of the key findings of this report are set out below.

### **Key Findings of Economic Report**

- In 2014, Lisburn & Castlereagh City Council accounted for 7.1% of Northern Ireland’s total output;
- Population levels in the new Lisburn & Castlereagh City Council area are expected to rise each year over the next decade, at a slightly higher rate than the Northern Ireland average (0.6% p.a. compared to 0.4% p.a. between 2014 and 2024;

- The local economy is dependent on health and the low value wholesale and retail sector for employment, but is under represented in higher value added exporting professional sectors;
- Over the next decade, job growth is likely to be driven by the professional/administrative service sectors, and construction;
- Labour market recovery is likely to be fairly modest over the coming decade, with employment levels rising by just 2.0% between 2014 and 2024. They will rise by 2.5% in Northern Ireland and 6.3% in the UK during this time.

### **Assessment of Future Need**

5.2 As set out in PPS 4 Planning and Economic Development, an estimate of the amount and location of land required should be carried out to ensure an ample supply of suitable land is available to meet economic needs. To quantify the lands needed, three different approaches have been used:-

#### ***Approach 1: Market Approach based on uptake of land***

5.3 Based on the amount of employment land developed to date (Section 3.5), the average take up of land zoned in BMAP 2015 over the last 5 years has been 17.8 hectares per annum, suggesting that 267 hectares will be needed up to 2030.

5.4 However, the problem of applying such a broad brush approach is that recognition is not given to disparities between take up on different zonings. For example, take up tends to be greater on zonings where Invest NI has intervened to provide serviced sites. The Invest NI industrial holdings also tend to be more attractive to investors because they are closest to the main communication corridors. Invest NI advise that there is currently no further land available at 6 of their 7 sites within the new Lisburn & Castlereagh City Council area. There is, however, Invest NI land available at Knockmore Hill Industrial Park, Lisburn (approx. 3.3 ha of usable land - see Annex 1).

### ***Approach 2: Traditional Employment Led Model***

- 5.5 To estimate the number of jobs required a methodology has been used based on economic activity, unemployment rates and the latest (2012-based) population projections from NISRA. By applying NISRA population projections, it is possible to estimate the number of people who will be economically active in 2030. The economic activity rate for the new Council district as derived from the 2011 Census is estimated to be 70.44% (Table 4.4). An unemployment rate of 4% has also been assumed.
- 5.6 By subtracting the number in employment in 2015 from the number in employment in 2030, the total number of jobs required between 2015 and 2030 is 6,347 (Table 5.1). A total of 6,500 jobs (at a rate of 50 jobs per hectare) would require approximately 130 hectares of employment land.

**Table 5.1 Estimated number in employment in Lisburn & Castlereagh City Council District 2015 – 2030 (16 – 74 age group)**

	2015 (1)	2030 (2)	Jobs created Approach 2 (2-1)
<b>Population Aged 16-74 (using NISRA population projections)</b>	101,454	110,901	
<b>Economically Active Population (70%)</b>	71020	77631	
<b>The number in employment (less 4% unemployment rate)</b>	68179	74526	6,347

*Columns 1 and 2 indicate the numbers in employment at the start and end of the plan period if current rates of economic activity were to continue. The figure in the final column is the difference in employment levels over the plan period.*

### ***Approach 3: An assessment of the need for economic land based on achieving 70% economically active working age population.***

5.7 In January 2014 the Department of Enterprise, Trade and Investment with the Department for Employment and Learning published '*Enabling Success – Driving social change through economic participation: a strategic framework to tackle economic inactivity*'. The goal for the strategic framework is to contribute towards a stable and competitive employment of over 70% by 2023 through a reduction in the proportion of working age population classified as economically inactive. The document defines working age as 16-64. It is necessary to make a number of assumptions which are set out in the step by step approach below:-

Assumption 1:

Population aged 16-64 in 2015 (NISRA 2012 projection) = 88,550

Assumption 2

The economic activity rate of 70% (Census 2011)

for the 16-74 age group can be applied to the 16-64 age group = 61985

Assumption 3:

The 70% DETI DEL target is applied to the 16-64 age group = 61985

NB Equates to Economic activity rate across Council i.e. 70%

Assumption 4:

Population aged 16-64 will rise by 2030 (NISRA 2012) = 92,603

Resulting in an increase = 4,053

Assumption 5:

70% of the rise of 16-64 will be economically active = 64,822

Assumption 6:

The number of jobs needed to be created by 2030 = 2,837

5.8 On closer examination of this approach, it is clear that the assumption that 70% of the 16-64 age group are economically active may be an underestimate as it is skewed by activity rates in the 65-74 age group. However, this most probably balances out against the pressure on

people to work longer in line with an increasing state retirement pension age. A benefit of this approach is that it addresses a methodological deficiency in the traditional model (Approach 2) which implicitly requires growth in the primary sector, which as the Council's recent Economic Forecast Report suggests is highly unlikely.

- 5.9 In determining which figure to adopt it should be reiterated that any calculated figure is sensitive to economic changes to NISRA population projections i.e. the difference between 2008 based and 2012 based projections. Accordingly any target set should be a minimum and kept under review.
- 5.10 For the purposes of this exercise it is recommended that Approach 2 potentially provides the most balanced option and the target should be set at providing economic development land to facilitate the creation of **at least 6,500 new jobs** which equates to 130 hectares of new employment land (i.e. 50 jobs per hectare). The existing development plan has 257.33 hectares of new employment zonings, and it is therefore unlikely that this figure will need to increase substantially to accommodate any future growth in this sector for the lifetime of the plan i.e. up to 2030. Given the plan, monitor and review requirements of the new Plan system requires a review of the Plan every 5 years (Regulation 26 of the Planning (Local Development Plan) Regulations (Northern Ireland) 2015), it is considered that this would be an appropriate time to review the existing situation and update if necessary.

## **6.0 KEY FINDINGS**

- 6.1 A summary of the key findings are as follows:-
- Opportunity exists to maximise the strategic location of Lisburn on the Dublin economic corridor and East/West transport corridor, and improve connectivity throughout the Council area to enhance the

movement of people, goods and services, and linkages between towns and rural areas;

- There is a need to recognise the potential that exists to attract large scale investment to kick start development on the Blaris Major Employment Location zoning through the provision of the M1 Knockmore Link, the North Lisburn Feeder Road and other improvements to the transportation system;
- Recognise the potential that exists to promote the regionally significant site Maze/Long Kesh which remains in public ownership to provide economic growth across the Council area;
- Opportunity exists to widen the existing economy base which is largely dependent on traditional/manufacturing, through promotion of knowledge based professional, scientific and technical sectors (e.g. Purdysburn Major Employment Location);
- There is a need to recognise the potential that exists for Lisburn city centre to grow its night-time economy;
- Key site requirements should address issues such as connectivity, infrastructure and provision of a high quality design environment.

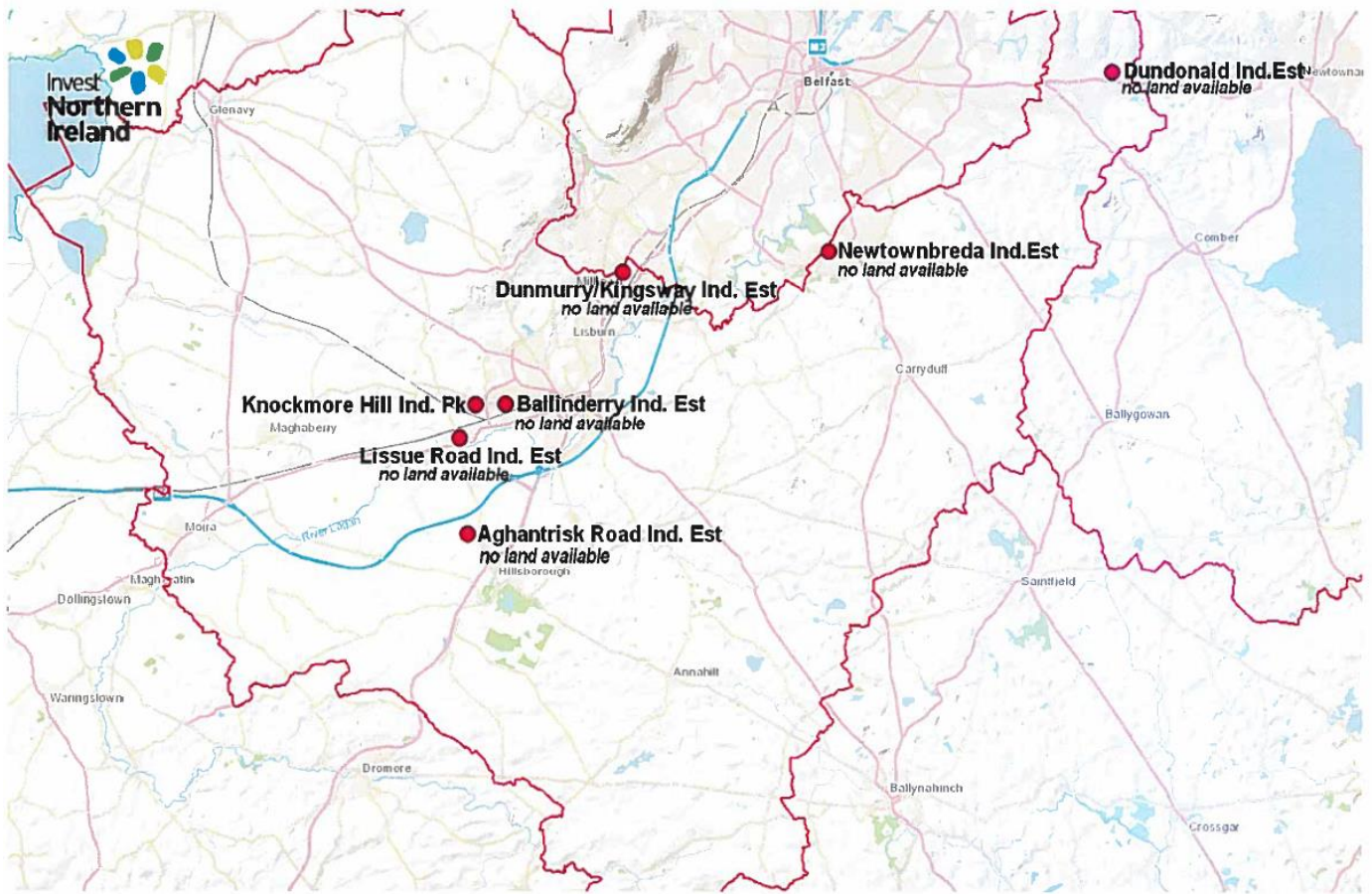
## **7.0 CONCLUSION**

- 7.1 The purpose of this paper is to provide base line information on the economic profile within the new Lisburn & Castlereagh City Council area and the uptake of existing zoned employment/industry zonings within the new Council area to assist in informing the Community Plan and to establish the future employment needs of the community. In compiling this paper, it is recognised that this evidence can be supplemented by the Community Plan process.

7.1 It is therefore recommended to Members that:

- (i) This report is considered and revised as necessary.
- (ii) Local and regional organisations representing groups under Section 75 are identified, included in the Statement of Community Involvement and consulted with as part of the process of formulating a new Local Development Plan.
- (iii) The needs identified are used as a working draft for the preparatory studies for the new Local Development Plan, and are taken into account when formulating both the aims and objectives of the plan and future policy.
- (iv) Consideration is given to the existing economic profile and Members' suggestions on changes to the employment zonings such as alterations to the status of existing zonings or designation of new zonings are welcome and will be subjected to a sustainability appraisal.

Annex 1: Invest NI land within Lisburn & Castlereagh City Council area



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Industrial Estate	Town/City	Parliamentary Constituency	District Council	Electoral Ward	Council (RPA)	Post Code	Lat	Long	Landholding (acres)	Available land (acres)	Landholding (ha)*	Available land (ha)*
Dundonald	Dundonald	Strangford	Castlereagh	carrowreagh	Lisburn and Castlereagh	BT16 1QT	54.59769	-5.78198	9.25	0.00	3.74	0.00
Newtownbreda	Belfast	Strangford	Castlereagh	beechill	Lisburn and Castlereagh	BT8 6AW	54.54885	-5.92547	4.00	0.00	1.62	0.00
Dunmurry / Kingsway Business Park	Dunmurry	Lagan Valley	Lisburn		Lisburn and Castlereagh	BT17 9HU	54.54561	-6.02029	78.85	0.00	31.91	0.00
Knockmore Hill	Lisburn	Lagan Valley	Lisburn	knockmore	Lisburn and Castlereagh	BT28 2FL	54.51276	-6.08982	75.00	8.20	30.35	3.32
Lissue Road	Lisburn	Lagan Valley	Lisburn	knockmore	Lisburn and Castlereagh	BT28 2RE	54.50361	-6.09705	66.32	0.00	26.84	0.00
Ballinderry Road	Lisburn	Lagan Valley	Lisburn	knockmore	Lisburn and Castlereagh	BT28 2FL	54.51311	-6.07613	6.28	0.00	2.54	0.00
Aghantrisk Road	Culcavey	Lagan Valley	Lisburn		Lisburn and Castlereagh	BT26 6JJ	54.47666	-6.09741	7.04	0.00	2.85	0.00