



Grant Thornton

An instinct for growth™

Recovery and Renewal – an economic strategy for the Causeway Coast and Glens

Causeway Coast & Glens Borough Council

July 2020



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1 A new economic reality

1. A new economic reality

1.1 Introduction

The economic strategy and action plan for the Causeway Coast and Glens council area was envisaged in a vastly different context, one where the global and local economies were in relatively positive growth territory, albeit with a range of long standing and emerging challenges in play. These challenges included the prospect of trade wars between China and the USA and the unknown terms of trade for the UK following the European Union Exit threatening to derail the global economy and long standing issues such as high levels of deprivation and economic activity etc. holding back the local economy. While many of our economic challenges hold, Covid-19 changed everything. While the economic challenges will always rightly pale in significance against the human tragedy of the global pandemic, it is appropriate to acknowledge the long-standing challenges our economy faces, take the economic lessons from the Covid-19 crisis and strive to meet them head on.

1.2 An uncertain path

The future path for the economy deeply uncertain. At the time of writing (July 2020), close to 20 years' worth of economic growth have been lost in little over three months. HM Treasury's collation of independent forecasts suggests the average of approximately 20 independent forecasts is for the UK economy to contract by just over 9% in 2020 before posting growth of 6.6% in 2021. There is no consensus around these rates of growth and they range from -12% to -6.6% this year and 1.5% to 10.3% next year. Locally, Danske Bank have taken a view that the economy here will contract by 11% this year and grow by 7% in 2021.

Estimating the impact of Covid-19 is obviously extremely difficult. A body of work from Ulster University's Economic Policy Centre (UUEPC) is tracking potential impacts and offering insights into the future path for the economy. Current thinking is that the economy will take between two and four years to recover lost ground.

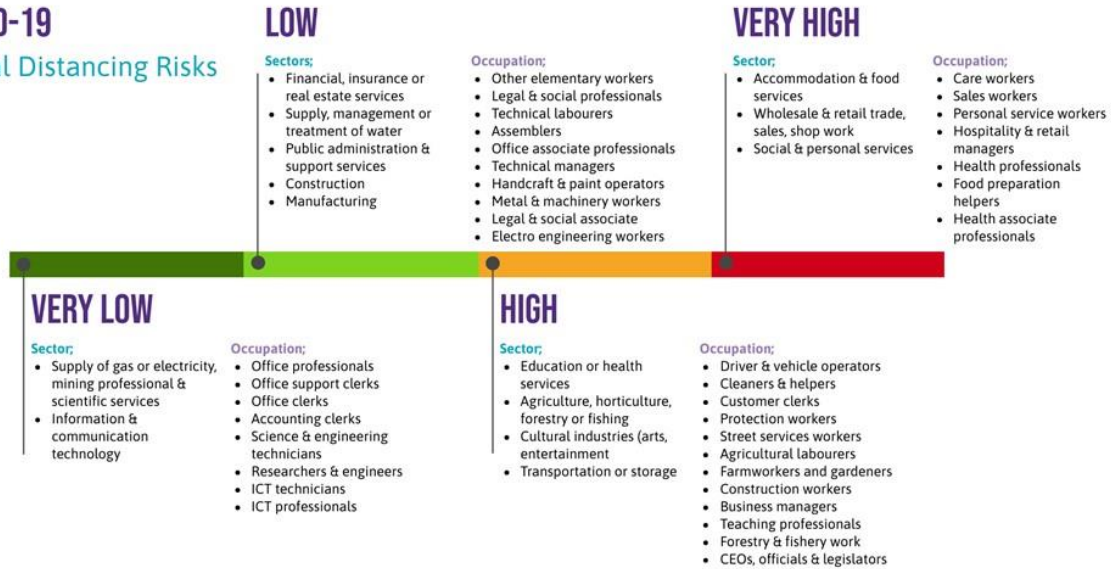
Unpicking the impact of Covid-19, and indeed finding opportunity within it, will be influenced by the extent to which the rapid changes and disruptions to our working and leisure practices take hold. For example. The rapid adoption of home working could benefit our borough by attracting new residents craving an exceptional quality of life. Global supply chain disruptions might also prompt businesses to seek a more localised supply chain, offering our borough an opportunity to build our industry.

Higher risks across sectors

The economic impacts of Covid-19 will affect sectors and occupations differently due to shifts in demand and reductions in capacity due to social distancing. The risk profile of sectors and occupations is below.

COVID-19

Social Distancing Risks



Given our employment structure, where just over two fifths (41.2%) of our employees are employed within high risk sectors (Retail – 20.4%, Manufacturing – 10.7%, Accommodation and Hospitality – 10.1%) our council area may be impacted harder than most.

1.3 A great challenge, and opportunity

It is within this new operating context that this economic strategy for the Causeway Coast and Glens area has been developed. This Strategy sets out to understand and evaluate the economic position of the Causeway Coast & Glens area and give recommendations for the council with a horizon of 2035. This strategy and action plan will be used by the Council to lead the borough in achieving its full potential in order to deliver inclusive and sustainable wealth and well-being for its citizens.

Aiding that drive towards the Borough achieving its full potential is the multi-million pounds' growth deal that the NI Executive and UK Government have agreed for the borough. This growth deal capital fund will support a suite of capital projects that allow the borough to raise the level of ambition for the economy.

The Covid-19 pandemic has highlighted the importance of being able to react at pace to new context. While this economic strategy and action plan provides a framework for action, and has been developed through rigorous data analysis and through conversations across the borough, it cannot afford to be rigid. The Borough's Economic Advisory Group, made up of a broad range of participants with a role in the economic life of the borough, will play a crucial role in maintaining the relevance of the actions taken to support the economic wellbeing of the borough.



2 Causeway Coast and Glen's economy

2. Causeway Coast and Glen's economy

2.1 Introduction

Prior to the Covid-19 pandemic, the global economy was posting consistent growth, albeit in the context of an increasingly uncertain environment. Trade wars and Brexit were looming large as economic headwinds. There were also fears that consumers, who had driven much of our global economic performance, were running out of steam.

Closer to home, indicators emphasised a mixed picture. Job creation was continuing to post strong results and unemployment levels were at historic lows. However, business and consumer sentiment surveys were showing that the uncertainty around Brexit was weighing on confidence. Although the Covid-19 pandemic has fundamentally changed our economic perspectives, it is still important to undertake an assessment of where the economy was so that underlying trends and issues are recognised in developing actions to support growth.

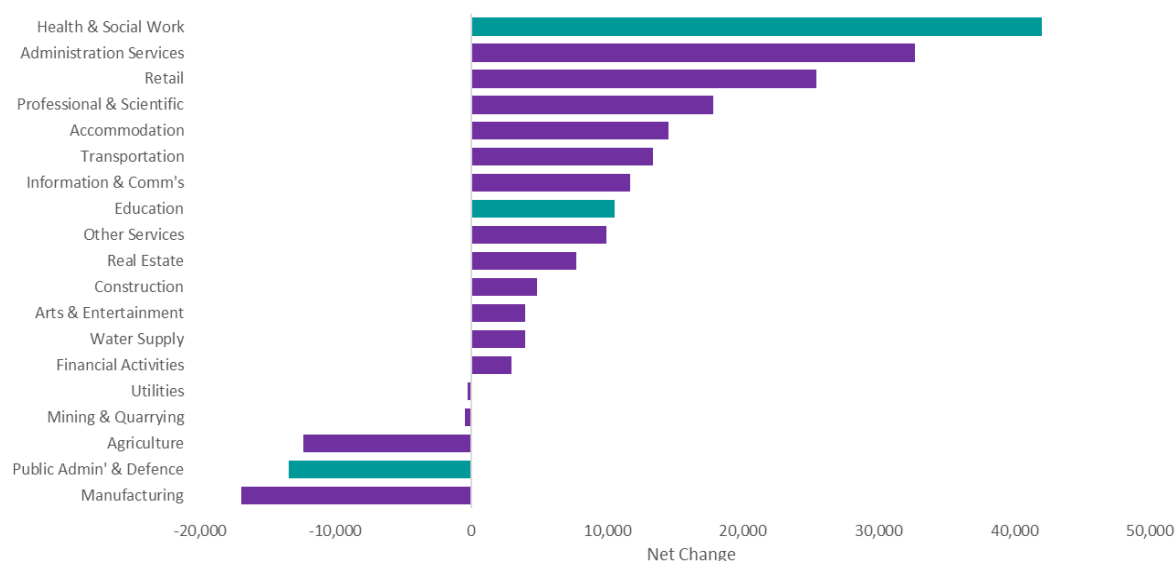
2.2 Northern Ireland Context

A strong labour market

NI has a current population of approximately 1.9 million, 62.7% of people between the working-age of 16-64. Since the start of the century, NI has seen significant growth within the labour market with approximately 158,000 net new jobs. The private sector has been the main driver of job creation accounting for 76.8% of all job growth (119,000 jobs).

The health and social sector, as well as the administrative services sector have seen the largest job growth, creating 42,000 and 32,800 jobs respectively. The largest decline had come in manufacturing, which is one of NI biggest private sector employers (10.6% of total employment). This sector suffered a net loss of 16,900 jobs since 2000. There is a myriad of reasons for this decline, including competition from cheaper locations and greater adoption of automated processes.

Figure 2.1: Total employment change by sector, NI, Q1 2000-20



Source: Nomis – Workforce Jobs

Economic Output Trends

While Northern Ireland's labour market has been posting strong levels of growth, economic output growth has been more benign. GVA growth prior to the financial crisis period (2000-08) was averaging 2.1% per annum. The recovery period since 2011 has seen average annual growth of 1.7% per year.

Figure 2.2: Real GVA growth, NI, 2001-18



Source: ONS – Regional Accounts

The official statistics suggest the NI economy was in decline (in real terms) in 2018, which is the latest available official data. The relatively insipid growth in output, married to the strong growth in employment serves to highlight an economic challenge that has troubled policy makers across the UK – the productivity puzzle. There is not a definitive view on why productivity growth has fallen away but one view suggests that in the context of Brexit uncertainty, it has been easier to invest in recruitment rather than invest in expensive capital equipment, which would boost productivity.

2.3 The Causeway Coast and Glens Economy

Causeway Coast and Glens Borough Council (CCGBC) covers 760sq miles from Rathlin Island in the north to the Sperrin Mountains in the south. Its eastern boundary is with Ballymena, while to the west it borders with Derry~Londonderry. Whilst largely a rural borough, there are a number of established settlements within the CCGBC area including Coleraine, Ballymoney and Limavady. There are also a number of popular tourist destinations including Portrush, Portstewart and Bushmills.

Figure 2.3: Causeway Coast and Glens Borough Council Area



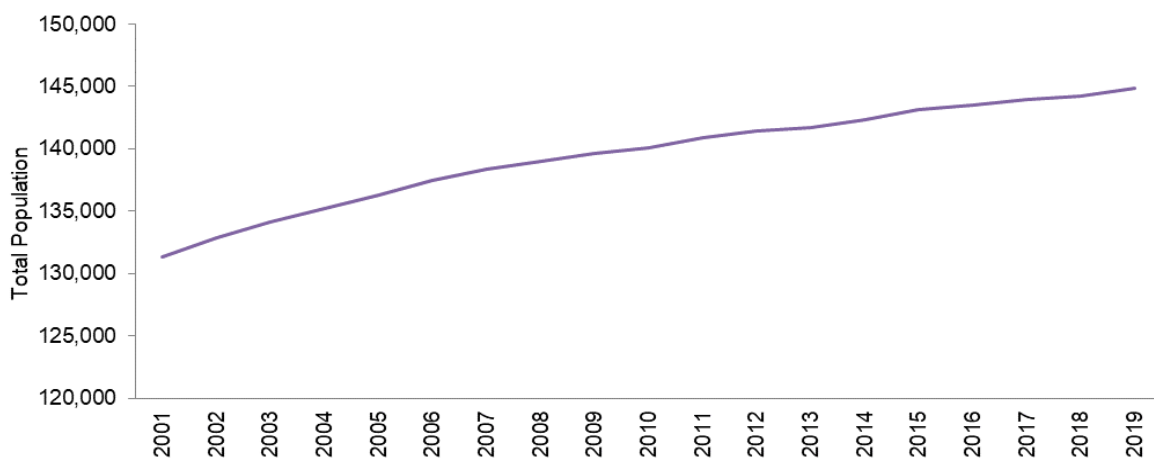
Source: Causeway Coast & Glens Borough Council

This report summarises the socio-economic profile of the area, to include: Demographic Profile; Health; Social and Environmental Deprivation; Crime; People Environment; Economy and Business Environment; and Tourism. A benchmarking section is also included, which compares the CCGBC area performance across a range of key indicators with the other 10 Northern Ireland Councils.

2.3.1 Population Change

Mid-year population estimates for 2019 from the NI Statistics and Research Agency (NISRA) note CCGBC's total population as 144,838, 7.6% of Northern Ireland's population. Between 2001 and 2019, the population of CCGBC has increased by 13,464 persons, a growth rate of 10.2% which is below the NI average of 12.1%. Figure 2.4 does however note a slowdown in population growth around 2009, linked to a marked change in net migration.

Figure 2.4: Population, Causeway Coast & Glens (2001 - 2019)



Source: NISRA Mid-Year Estimates

The table below provides a breakdown of the population by age, with 19.6% children, 61.9% representing the majority of the working age population (16-64) and 18.4% aged 65 years and over.

Table 2.1: Population Estimates by broad age bands, 2019

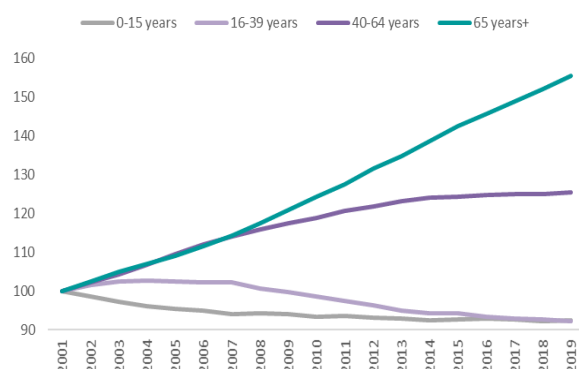
Age band	CCGBC	%	NI	%
Children (0-15 years)	28,411	19.6%	395,925	20.9%
Young Working Age (16-39 years)	41,778	28.8%	578,542	30.6%
Older Working Age (40-64 years)	47,995	33.1%	604,476	31.9%
Older (65 years+)	26,654	18.4%	314,724	16.6%

Source: NISRA Mid Year Estimates

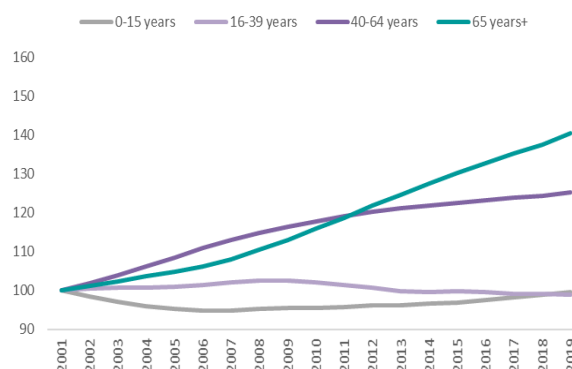
Since 2001, there has been a noticeable shift in the local demographic trends. The most noticeable increase is in the number of 65 plus, with a 55.4% increase versus a 40.4% across Northern Ireland. In addition, the proportion of those aged 16-39 has decreased by 7.7% compared to 1.1% at a Northern Ireland wide level. These trends impact on a range of issues including the availability of labour and consumption patterns within the CCGBC area.

Figure 2.5: Indexed Demography Shifts (2001 - 2019)

Causeway Coast & Glens



Northern Ireland

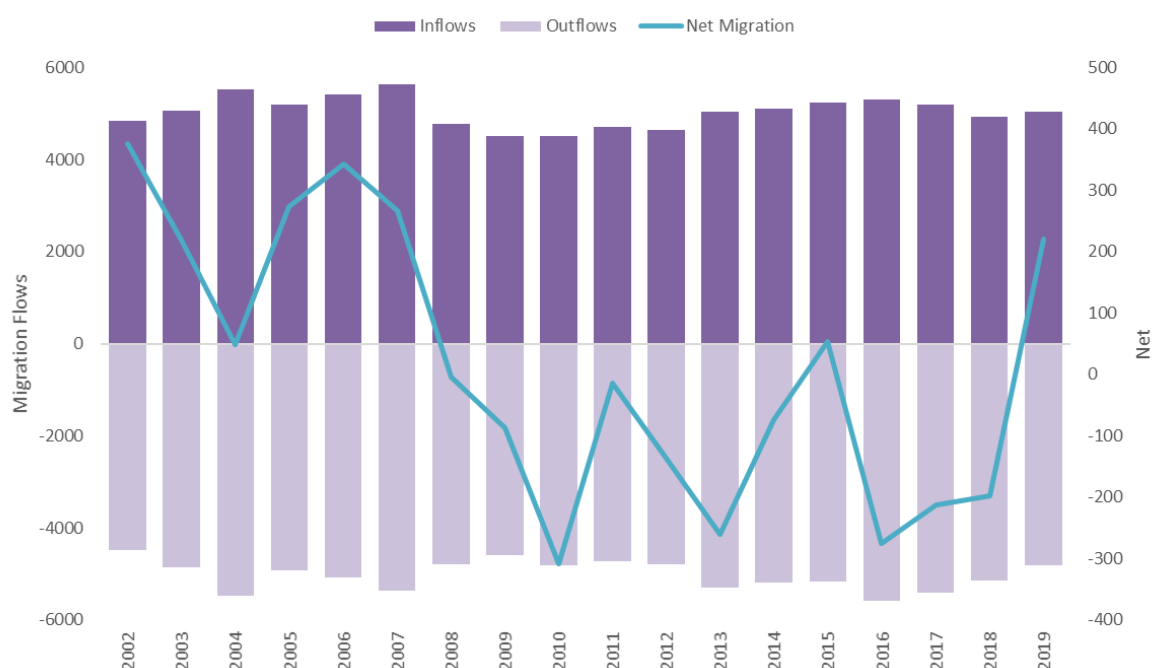


Source: NISRA Mid Year estimates

The slow-down in population growth since the economic downturn corresponds to a marked change in net-migration. Prior to the recession and downturn in 2009 and 2010, CCGBC benefited from a net positive inward migration in excess of 270 people per annum in 2007. During and since the recession this shifted to become a net negative figure, with more people leaving the Borough than becoming residents.

The decline reached a trough in 2010 with net out migration of c.309. More recently, in 2015 net migration was positive, however has decreased to a net negative figure below 200 people per annum between 2016 and 2018, before rising again to c.221 in 2019.

Figure 2.6: Migration flows, Causeway Coast & Glens, 2001 – 2019



Source: NISRA Mid Year estimates

Population forecasts

Insight into future population numbers are a crucial element of service delivery planning. CCGBC's projected growth is expected to be stable and relatively benign compared to Northern Ireland as a whole, with the population in the Borough reaching a peak in 2025 before decreasing. It is estimated that the CCGBC area's population will decrease by approximately 2.7% by 2043, to 140,314. Northern Ireland is forecast to add 5.7% to total population over the same period, reaching approximately 1,989,195.

Table 2.2: Population forecasts (2018 based population projections)

Year	CCGBC	NI
2020	144,914	1,901,856
2025	145,554	1,937,636
2030	144,983	1,958,990
2035	143,543	1,972,163
2043	140,314	1,989,195

Source: NISRA – 2018 Bases Population Projections

With the general population expected to decrease by 2.7%, the core message is one of a sharply aging demographic profile. All age cohorts are projected to decline except those in the age 65+ band. This cohort is projected to increase by 58.1%. When compared to Northern Ireland trends, there will be a larger fall in the proportion of children and those of working age, likely increasing the average age within the Borough.

By 2043, the number of children will make up 14.8% of the CCGBC population compared to 29.4% of the population aged 65 years and over. As a result, the working age population (16-64 years) is projected to decrease by 29.4% or 13,002 persons from 2018 to 2043.

These trends will continue to impact the function of the local economy in terms of availability of labour and consumption patterns.

Table 2.3: Population Change (2018 - 2043)

Population change	CCGBC		NI	
	Difference	% Diff	Difference	% Diff
0-15 years	-6,085	-21.4%	-42,569	-10.8%
16-39 years	-7,303	-17.5%	-21,814	-3.8%
40-64 years	-5,699	-11.9%	-1,246	-0.2%
65 years+	15,155	58.1%	173,183	56.2%
Total Population	-3,932	-2.7%	107,554	5.7%

Source: NISRA

2.3.2 Health

The area is served by both the Northern and Western Health and Social Care Trusts, with the key facilities in the CCGBC area including Causeway Hospital, Roe Valley Hospital and Dalriada Hospital.

According to the health inequalities 2020 report the life expectancy at birth for both females and males within the CC&G area are above the NI average at 83.1 and 79.3 respectively. The standard of life within the CC&G area can be seen as relatively high, with all standardised death rates and causes below the NI average. However, although CC&G as a whole can be seen as an area with a high standard of life, the inequalities between the overall areas average and those areas within the borough deemed as deprived is stark.

Admission rates for those who self-harm within the CC&G area was 119 per 100,000 populations, however when looking at the bottom 20% those areas within the borough, this figure more than doubles (239). Similarly, the level of suicides within the area per 100,000 of the population during the 2014-18 period was 12.1, which is 24.3% below that of the NI rate, however its Deprivation Gap was 93.5% above.

While health statistics in the CC&G area are in good health compared to the NI average, there is still a need for improvements to be made within the most deprived areas which are significantly lower than that of council average. For example, while health is a key indicator for understanding the current profile of the population. Another key indicator for overall standards of living is that of wellbeing which indicates an individual's response on overall life satisfaction, worthwhileness, happiness and anxiety levels.

2.3.3 Wellbeing

Causeway coast and Glens borough council as a whole can be deemed as a place with a relatively high standard of living when looking at its wellbeing statistics. On average the council ranks above the NI average in all indicators, ranking second highest in life satisfaction of all 11 Local Government Districts (LGDs). It's resident's levels of worthwhileness and happiness also pose a high ranking (4th), while the councils levels of anxiety (although still relatively low) however rank quite high in 8th. These results generate an interesting question in terms of how residents can be seen to have high levels of life satisfaction, worthwhileness and happiness, however yet still anxious and the possible reasons as to why will be further analyses throughout this report.

Table 2.4: Wellbeing Statistics, LGDs, 2018/19

Life Satisfaction	Worthwhileness	Happiness	Anxiety levels
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Antrim and Newtownabbey	7.7	8.0	7.6	2.8
Ards and North Down	7.9	8.1	7.7	2.6
Armagh City, Banbridge and Craigavon	8.0	8.2	7.7	2.7
Belfast	7.6	7.6	7.3	3.3
Causeway Coast and Glens	8.1	8.3	7.8	2.8
Derry City and Strabane	7.7	8.0	7.7	3.4
Fermanagh and Omagh	8.2	8.3	8.2	2.3
Lisburn and Castlereagh	8.0	8.1	7.9	2.6
Mid and East Antrim	8.0	8.4	7.8	2.6
Mid Ulster	8.0	8.1	7.8	2.7
Newry, Mourne and Down	8.1	8.3	7.9	2.7
Northern Ireland	7.9	8.1	7.7	2.8

Source: ONS – Wellbeing indicators

Note: Questions asked – Overall, how satisfied are you with your life nowadays? Where 0 is 'not at all satisfied' and 10 is 'completely satisfied' ~ Overall, to what extent do you feel the things you do in your life are worthwhile? Where 0 is 'not at all worthwhile' and 10 is 'completely worthwhile' ~ Overall, how happy did you feel yesterday? Where 0 is 'not happy at all' and 10 is 'completely happy' ~ Overall, how anxious did you feel yesterday? Where 0 is 'not at all anxious' and 10 is 'completely anxious'

2.3.4 Social and Environmental Deprivation

Northern Ireland is split into 890 spatial areas known as Super Output Areas (SOAs), with an average population of around 2,100 people. There are 72 SOAs in CCGBC, representing 8% of the total SOAs in NI. These 72 SOAs range in population size from 1,121 to 2,930 people with an average size of 1,994 persons (according to the mid-2016 estimates).

The Northern Ireland Multiple Deprivation Measure (NIMDM) 2017 provides information on 7 types of deprivation and an overall measure of multiple deprivation (MDM), where each of the SOA are ranked, from 1 (most deprived) to 890 (least deprived).

Only the Ballysally_1 ward in Coleraine and the Coolessan ward in Limavady fall within the top 10% of the most deprived wards in Northern Ireland, reflecting its neighbourhood renewal area status. In terms of other specific areas of deprivation across the Borough, there are pockets of income and proximity to services deprivation with:

- 12 of the 72 SOA's have been identified as deprived in terms of income; and 2 mainly rural SOA's are identified as being deprived in relation to access to services.

Table 2.5: Deprivation Summary

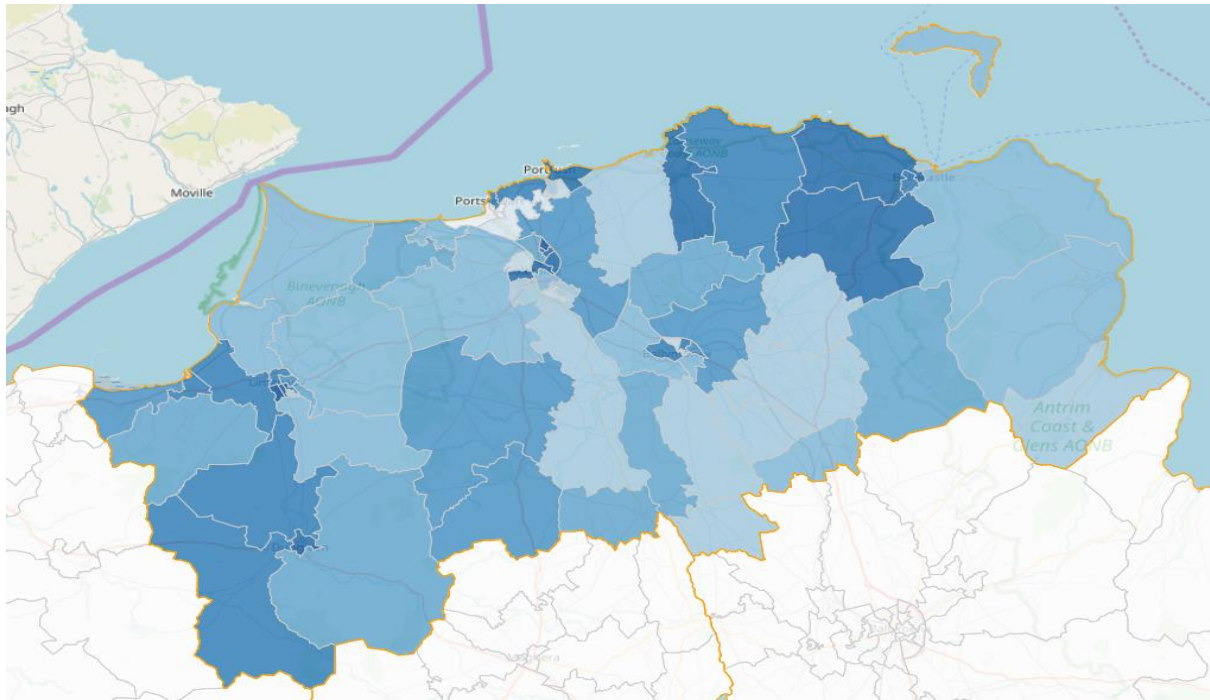
Year - 2017	Rank of most deprived ward in CCGBC	Number of wards within 10% most deprived	Wards in 10% most deprived
Multiple deprivation	31	2	Ballysally_1; Coolessan
Income deprivation	6	12	Armoy and Moss-Side and Moyarget; Ballylough and Bushmills; Ballysally_1; Carnmoon and Dunseverick; Central; Coolessan; Dungiven; Feeny; Garvagh; Glentaisie and Kinbane; Royal Portrush; The Highlands
Employment deprivation	23	2	Ballysally_1; Coolessan
Health Deprivation and Disability deprivation	48	1	Coolessan
Education, Skills and Training deprivation	67	1	Coolessan
Access to Services deprivation	12	12	Aghanloo_2; Armoy and Moss-Side and Moyarget; Ballyhoe and Corkey; Carnmoon and Dunseverick; Dunloy; Glack; Glanaan and Glendun; Knockaholet; Magilligan; Ringsend; The Highlands; The Vow
Living Environment deprivation	62	2	Dundooan_1; Knockaholet
Crime and Disorder deprivation	18	7	Atlantic; Central; Coolessan; Greystone; Portstewart; Roeside; Royal Portrush

Source: Multiple Deprivation Index 2017

Note: Ranking of 1 being most deprived; 890 least deprived

Figure 2.7 below shows the location of the deprived wards across the Borough. The most deprived wards are primarily concentrated around the main settlements of Coleraine, Limavady and the area around Ballycastle.

Figure 2.7: Concentration of Deprivation in Causeway Coast & Glens, 2017



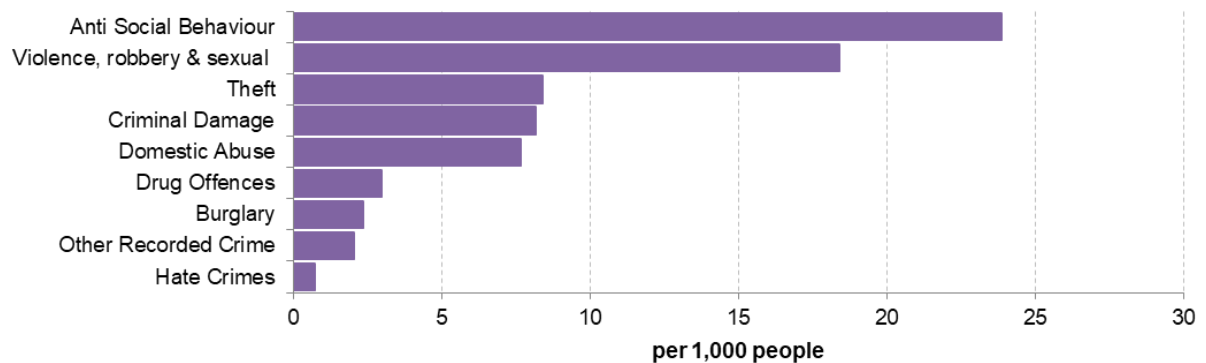
Source: NINIS

2.3.5 Crime

In 2018/19, a total of 6,098 criminal offences were recorded in the CCGBC area, equating to an overall recorded crime rate of 42 per 1,000 persons. This was lower than the overall Northern Ireland rate of 54 per 1,000 persons.

Anti-social behaviour accounts for the largest proportion of crime in the CCGBC – a rate of 24 per 1,000 persons.

Figure 2.8: Crimes per 1,000 people, 2018/19

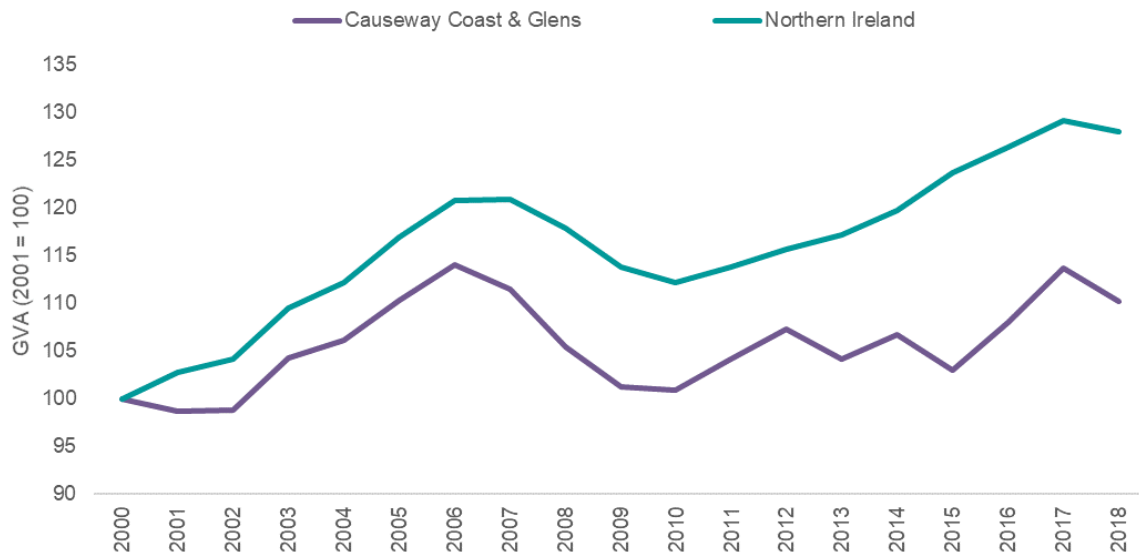


Source: PSNI

2.3.6 GVA, productivity and exports

In 2018, the CCGBC area contributed nearly £2.1bn to the Northern Ireland economy, representing 5.2% of the NI's Gross Value Added (GVA) of £40.1bn. Prior to 2007, the economy in CCGBC tracked in line with NI's, with GVA increasing by 14.0% between 2000 and 2006. Since 2007, there has been a divergence between the NI economy and the CCGBC area. Between 2008 and 2012 during the recession, the CCGBC economy grew by 1.7% while the NI economy shrunk by 1.9%. Post the recession, CCGBC's growth of 5.8% has tracked behind NI's growth of 9.3% between 2013 and 2018. However, the NI economy began to reach pre-recession output levels in 2015, while the CCGBC only reached 2007 levels in 2017.

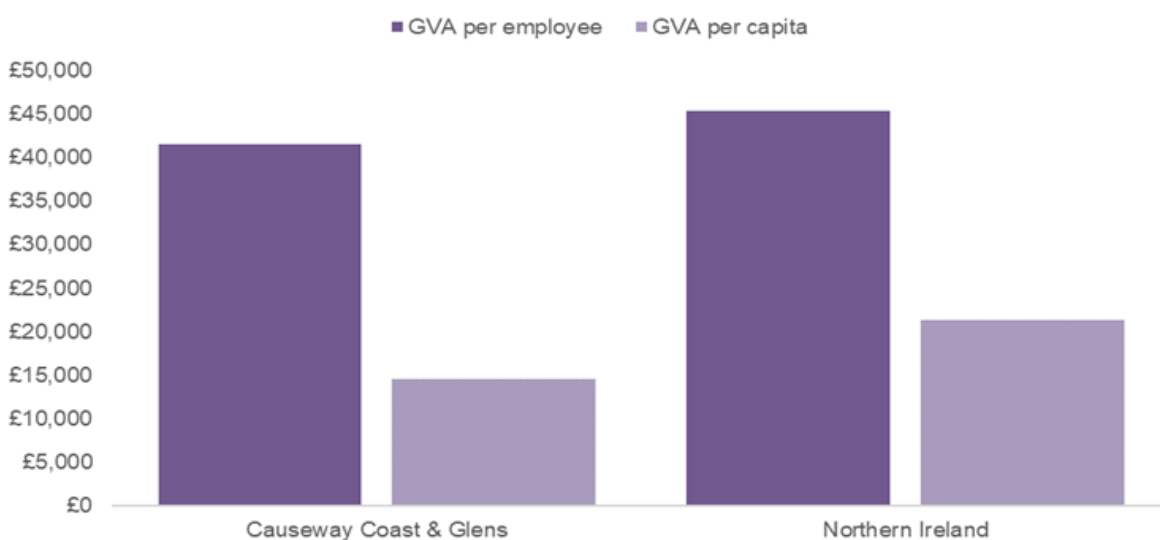
Figure 2.9: Indexed Real GVA growth CCGBC v NI



Source: Office for National Statistics

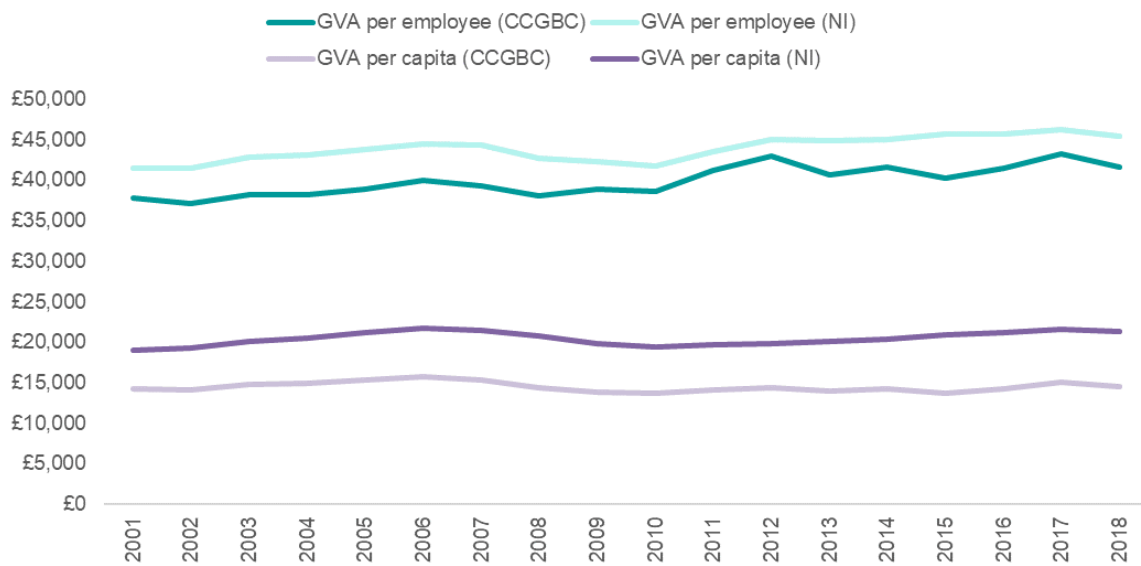
In terms of productivity, CCGBC is below the Northern Ireland average. In 2018, GVA per employee was lower than the NI average (£41,600 v £45,500) and lower in terms of GDP per capita (£14,500 v £21,300). Since 2001 per employee at a CCGBC, level has largely tracked behind NI, despite some convergence and re-divergence during the period (Figure 4.3). In relation to GVA per capita, a key indicator of prosperity, CCGBC has consistently under performed in comparison to NI.

Figure 2.10: Real Productivity, Causeway Coast & Glens v Northern Ireland, 2018



Source: ONS & BRES

Figure 2.11: Productivity trends 2001-2018 Causeway Coast & Glens v Northern Ireland



Source: ONS & BRES

The NI Economic Strategy notes that export led growth is a key driver, citing a need to both grow exports and diversify into new markets. Reflecting this, Invest NI have been opening a range of new international offices in locations such as Toronto, Santiago, Singapore, Hong Kong, Qatar, Madrid, Australia and South Africa aimed at developing new trade links.

Latest statistics suggest that Northern Ireland companies sell £24bn of goods and services, of which CCGBC contributed £1bn, outside Northern Ireland (inc. to the rest of the United Kingdom). Having posted growth in exports in 2012 and 2013, exports declined between 2013 and 2015. Since 2015, exports in Northern Ireland have increased by 18%. The value of exports in CCGBC increased by 95% in the period between 2015 and 2018 to £600m.

The major markets that Northern Ireland exports serve are presented in Table 4.1. Key markets for Northern Ireland’s exports are the Republic of Ireland (33%), US & Canada (19%), Asia (9%) and Germany (5%). It is not possible to source detailed trade statistics for the value of exports to each country at local Council level, however for those that statistics are available CCGBC exported £256m to the Republic of Ireland, £242m to the rest of the EU and £105m to the rest of the World.

Table 2.6: Key Northern Ireland export markets 2018

Country	Share of total exports 2018
Republic of Ireland	37%
North America	19%
Asia	9%
Germany	5%
Netherlands	4%
Middle East	4%
France	3%
Belgium	3%
Australia	2%
Switzerland	2%
Other markets	12%

Source: Department of the Economy – Northern Ireland Broad Economy Sales & Exports Data

2.3.7 Registered companies

In 2020 there were a total of 6,015 registered companies in the CCGBC area, an increase of 4.4% from 2017 (5,760 registered companies). CCGBC ranks in the middle (7th) of NI's Councils for the number of VAT and PAYE registered businesses, accounting for 7.9% of NI total. Table 4.2 shows that Causeway Coast & Glens ranks above the NI average in terms of number of businesses per capita. Conversely CCGBC ranks 8th in terms of average business size, with 5.9 employees per businesses. This compares to 7.7 across Northern Ireland.

Table 2.7: Number of VAT and/or PAYE registered businesses operating in NI by LGD, 2020, ranked by businesses per capita

District Council Area	No. registered companies	of %	Avg size	Number of businesses per 1,000 population
Fermanagh and Omagh	8,175	10.7%	4.5	69.6
Mid Ulster	9,035	11.9%	6.0	60.8
Newry, Mourne and Down	8,865	11.7%	6.1	48.9
Causeway Coast and Glens	6,015	7.9%	6.1	41.5
Armagh City, Banbridge and Craigavon	8,725	11.5%	6.8	40.4
Northern Ireland	76,090	100.0%	7.8	40.4
Mid and East Antrim	4,955	6.5%	6.4	35.6
Derry City and Strabane	5,320	7.0%	7.5	35.2
Lisburn and Castlereagh	5,010	6.6%	8.8	34.3
Belfast	11,065	14.5%	14.5	32.2
Antrim and Newtownabbey	4,190	5.5%	9.3	29.2
Ards and North Down	4,740	6.2%	7.4	29.3

Source: Inter Departmental Business Register

2.3.8 Business size

The CCGBC area has a similar business demographic to the rest of NI. It is a SME driven economy, with 91.5% of businesses under 10 employees in 2019, but has a higher proportion of SME's than the Northern Ireland average. CCGBC has 35 firms with over 100 employees, representing 0.6% of total firms in the Borough, compared to 1.1% across Northern Ireland.

Table 2.8: Business demography – Companies by size (employees), 2020

Companies by size (employees)	CCGBC		NI	
	Number	%	%	%
0	2,340	38.9%	31.5%	
1-9	3,160	52.5%	57.8%	
10-19	265	4.4%	5.3%	
20-49	155	2.6%	3.2%	
50-99	55	0.9%	1.1%	
100-199	20	0.3%	0.5%	
200-249	5	0.1%	0.1%	
250+	15	0.2%	0.4%	
Total	6,015	-	-	

Source: Inter Departmental Business Register

In respect of company size by turnover, the demographic profile of companies in CCGBC is similar to that overall in NI. The percentage of companies with turnover less than £50,000 in CCGBC is marginally higher (2 percentage points) than the NI average. Conversely the percentage of companies with turnover greater than £500,000 is 3 percentage points lower than the NI average.

Table 2.9: Business demography – Companies by size (turnover), 2020

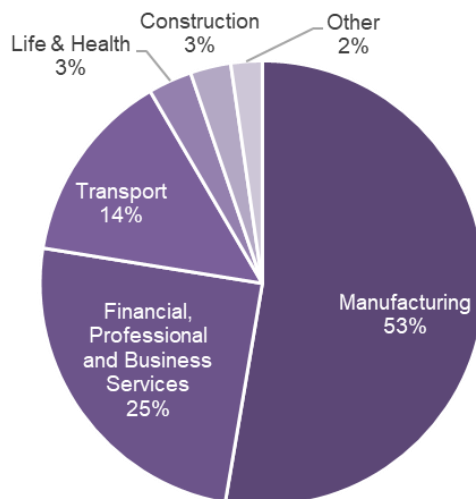
Turnover Size Band (£ thousands)	CCGBC		NI
	Number	%	%
0 - 49	1,565	26%	25%
50 - 99	1,070	18%	18%
100 - 249	1,615	27%	26%
250 - 499	785	13%	12%
500 - 999	475	8%	8%
1,000 - 4,999	395	7%	8%
5,000 +	110	2%	3%
Total	6,015	-	-

Source: Inter Departmental Business Register

2.3.9 Invest NI client companies

Invest NI provides support to help businesses across Causeway Coast & Glens create jobs, innovate and grow exports. The sectoral mix of supported companies is presented in Figure 4.4 and shows a significant weighting towards manufacturing (53% of the total).

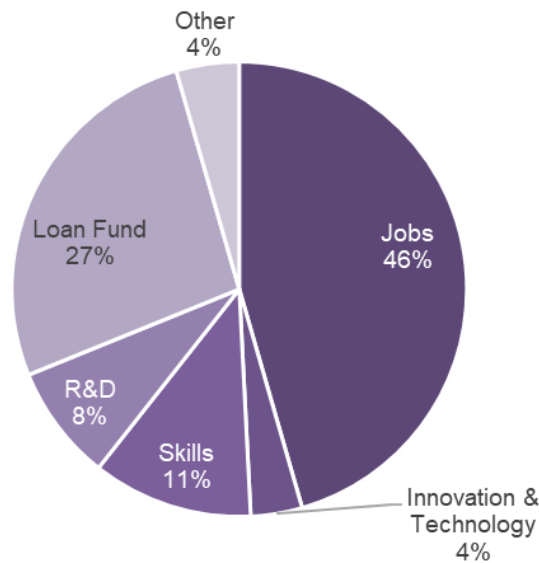
Figure 2.12: Invest NI Supported Companies in CCGBC, 2019



Source: Invest NI / Open Data NI

Over the past 5 years Invest NI has allocated £14.9m to businesses in the CCGBC area, representing only 2.8% of Invest NI total investment across NI. The biggest investors over this time have been McAuley Precision Limited, J. F. & H. Dowds Limited, LacPatrick Dairies (NI) Limited, Woodland Kitchens (N.I.) Limited and WD Meats. Almost half of the support offered by Invest NI has been allocated to jobs.

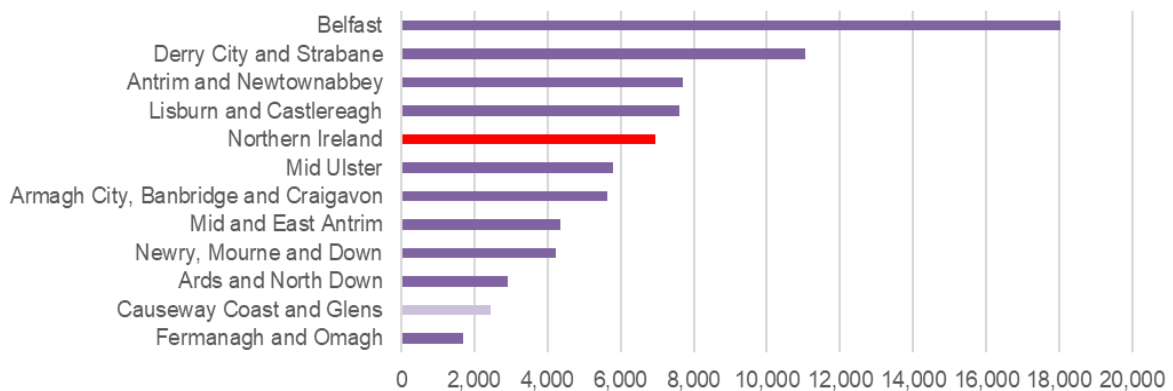
Figure 2.13: Invest NI, type of assistance offered, CCGBC, 2018/19



Source: Invest NI / Open Data NI

To provide context to the Invest NI support the total support offered has been calculated on a ‘per business’ basis. While this measure does not take account of nuances in the concentrated of SME/micro businesses or location of larger businesses (which are more likely to be Invest NI clients), it does provide a useful benchmark. At just over £2,000 support on a per company basis, CCGBC area ranks 10th out of the 11 NI Councils for the amount received and considerably below the NI average of £7,000.

Figure 2.14: Assistance offered by Invest NI by Council area and per business (£)



Source: Invest NI / Open Data NI

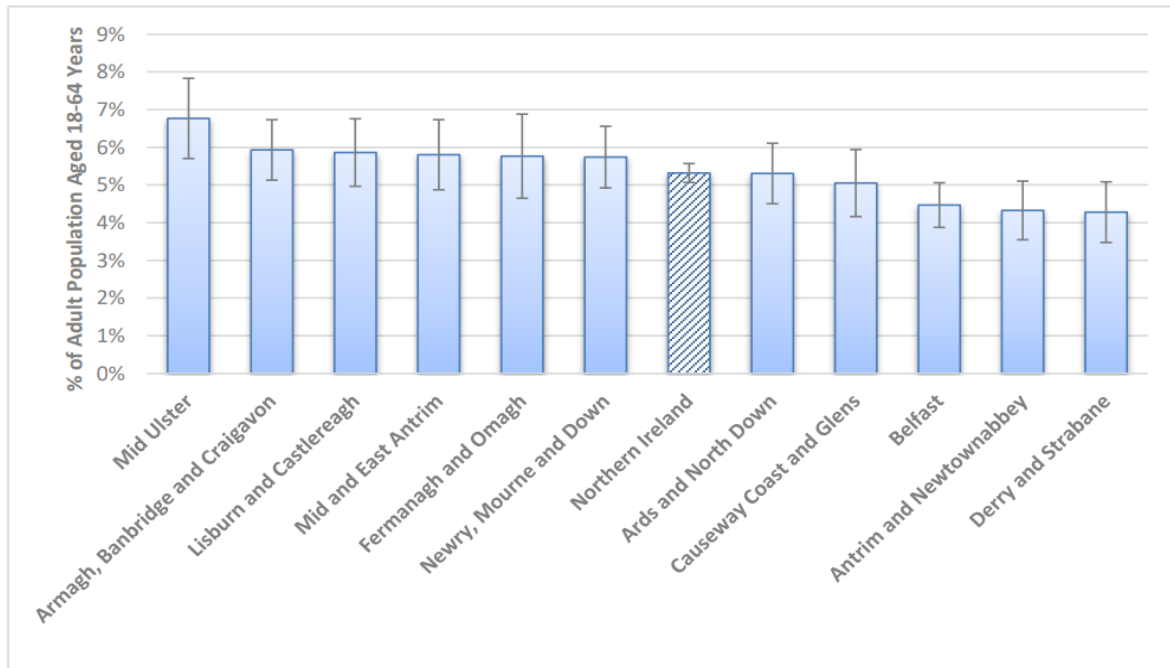
2.3.10 Total Early-Stage Entrepreneurial Activity

The preceding analysis on business demography points towards a Borough that is more entrepreneurial than other Council areas (i.e. a higher concentration of SME’s). The most widely accepted indicator for Entrepreneurship is the Global Entrepreneurship Monitor’s Total Early-Stage Entrepreneurial Activity (TEA), which assess the percentage of working age population both about to start a business or venture and that have started one within the last three and a half years.

Figure 6.1 below plots the average TEA by Council area from 2003 to 2018, the purpose of which is to average out any random annual fluctuations. TEA in Northern Ireland falls significantly behind UK levels and CCGBC ranked 4th lowest of all the Northern Ireland councils for TEA over the period from 2003 to

2018, with a figure of c. 5% and below the Northern Ireland average. This suggests there is a relatively low appetite for entrepreneurship in the Borough.

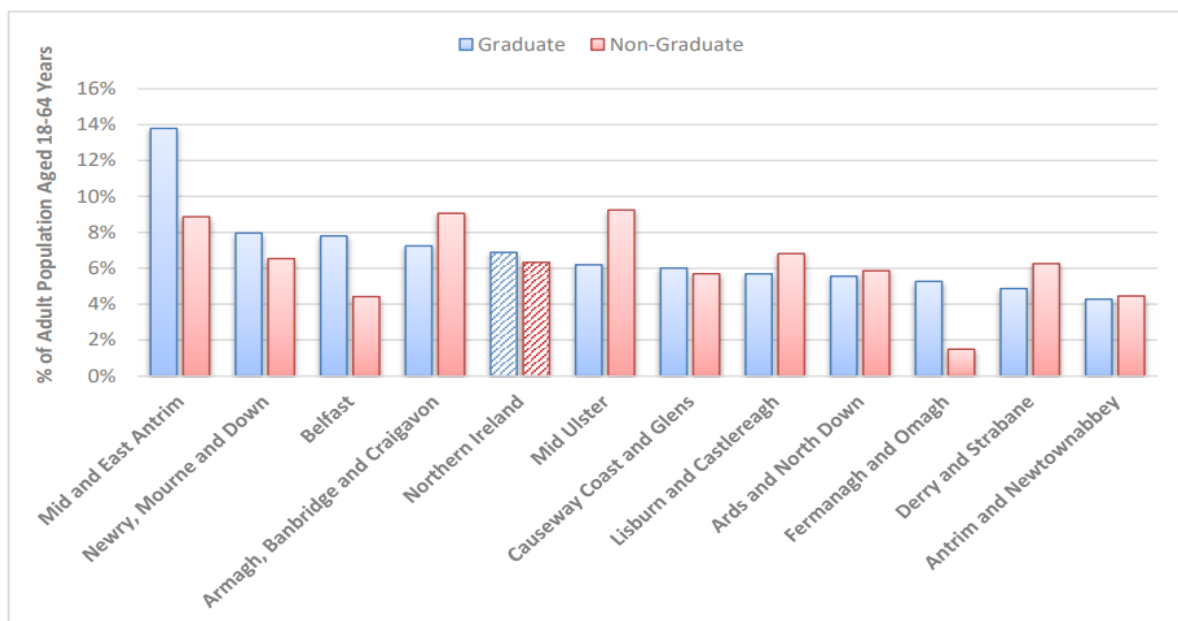
Figure 2.15: TEA in Northern Ireland in 2003-2018 by Council Area, with 95% confidence intervals



Source: Global Entrepreneurship Monitor Northern Ireland Report 2018

When considering graduate and non-graduate performance, CCGBC ranks in the middle (i.e. 6th) of all the Northern Ireland Council areas. This is driven by Graduate levels of circa 6.0%, ranking 6th out of the 11 Council areas. Non-Graduate performance comparable to the other Councils ranks 8th out of the 11 Council areas, however unlike other Councils there is not a significant variance between the percentage of TEA by graduates and non-graduates.

Figure 2.16: TEA in Northern Ireland by Graduate Status and Council Area, combined over 2016-2018



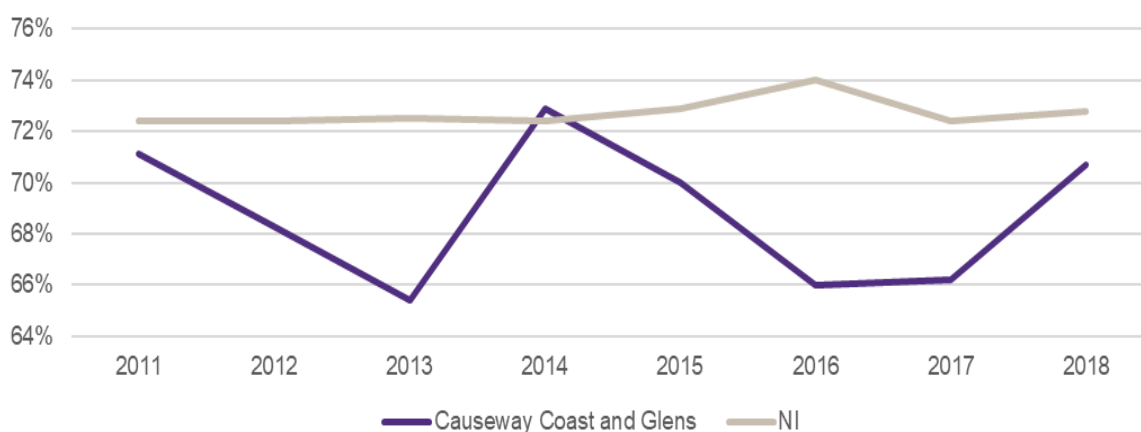
Source: Global Entrepreneurship Monitor Northern Ireland Report 2018

2.3.11 Economic activity

In 2018, 70.7% of those aged 16-64 living in CCGBC were economically active and 29.3% were economically inactive. This compares with 72.8% economically active and 27.2% economically inactive for NI.

The long tail of the recession impacted economic activity levels in CCGBC between 2011 and 2013, with economic activity decreasing from 71.1% to 65.4%, while NI wide levels remained fairly constant. However, since 2013, activity has increased by five percentage points, compared to a 0.3% increase across NI.

Figure 2.17: Economic activity (% of working age population), 2011 – 2018



Source: NISRA

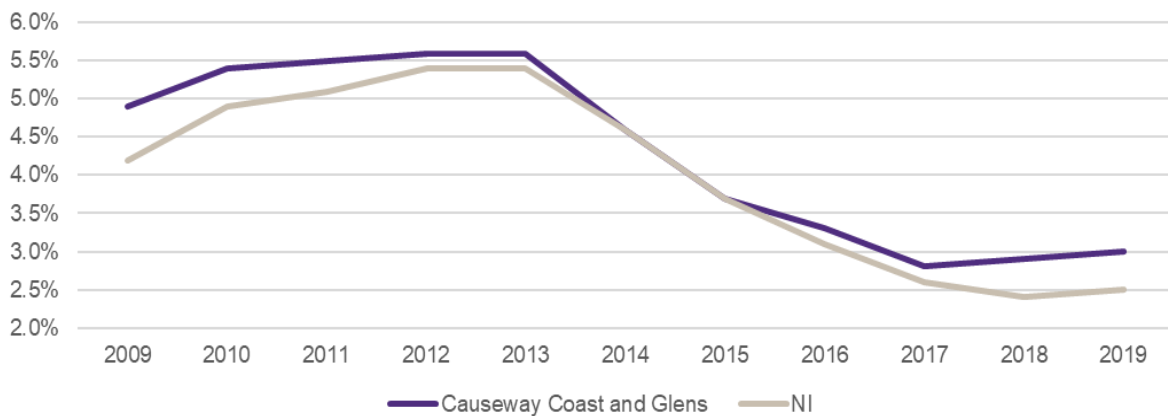
2.3.12 Claimant count

The average number of people aged 16-64 in CCGBC claiming Job Seekers Allowance (JSA) in 2019 was 2,695 representing a claimant count annual average rate of 3.0%. This compares with a claimant count rate for NI of 2.5% in 2019.

The youth claimant count rate (aged 18-24) in 2018 was 4.4% in CCGBC and is higher than that of NI overall (3.7%). The proportion of total claimants who were long term unemployed in 2017 is also higher in CCGBC at 41.3% when compared to that of NI overall (32.8%).

CCGBC follows the same general trend line as NI (Figure 7.2), albeit at a marginally higher level. The impact of recession from 2009 can be seen in the increasing levels of unemployment and claimant count, reaching a peak of 5.6% in 2012 and 2013 (NI: 5.4%). Since 2013, the claimant count steadily decreased to its minimum position in 2017 of 2.8% (NI: 2.6%). The minimum claimant count in NI in the same period was 2.4% in 2018. Claimant count has begun to increase in recent years to its current level of 3.0%, compared to 2.5% in NI overall.

Figure 2.18: Total claimants (as % of working age population), 2009-2019

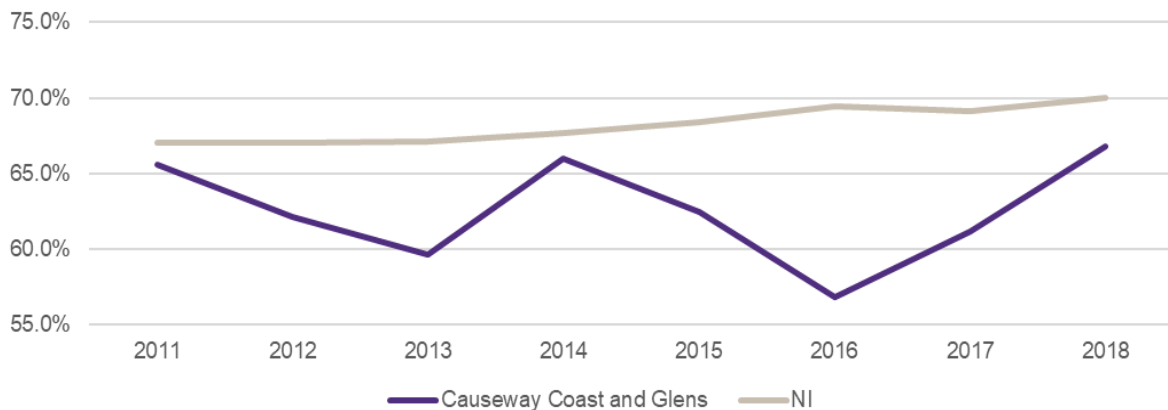


Source: NISRA

2.3.13 Employment rates

In 2018, the 16-64 employment rate in CCGBC was 66.8%. This is lower than the overall 16-64 employment rate for Northern Ireland which was 70.0%. The employment rate in 2018 in both CCGBC and NI is the peak for the period reviewed. Employment rates in the Borough have fluctuated each year; whilst in NI overall there has been a general trend of growth in the employment rate.

Figure 2.19: Employment rate (% of working age population), 2011 – 2018



Source: NISRA

In terms of numbers of residents employed, this reached 57,000 in 2018, which is still down on the peak of 65,000 in 2011. Causeway Coast & Glens under performs in Northern Ireland in terms of employment and showed less resilience during the long tail of the recession, which began, to impact between 2011 and 2015. In 2018 employment levels in the Borough are nearly seven percentage points lower than the Northern Ireland average.

2.3.14 Earnings profile

At April 2019, the gross full-time median weekly wage in Causeway Coast & Glens was £448 compared with £535 for NI, 19% lower.

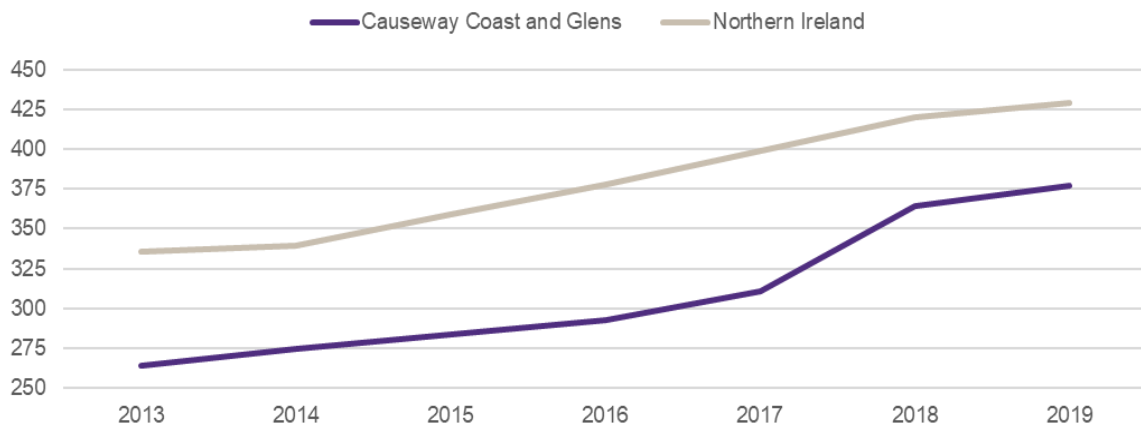
Table 2.10: Median weekly wage by place of work, April 2019

Year	CCGBC (£)	NI (£)	% difference
All	377	429	-14%
Full-time	448	535	-19%
Part-time	188	196	-4%

Source: NISRA

Since 2013, real median wages have been increasing across Northern Ireland and CCGBC. Despite this growth in wages, CCGBC still lags behind the overall average in Northern Ireland in 2019 by 14 percentage points.

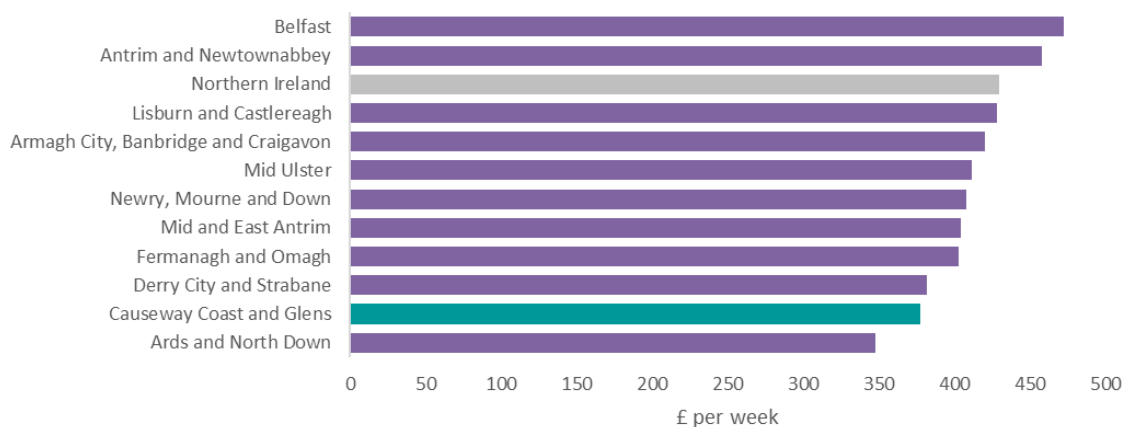
Figure 2.20: Median real gross weekly wage trends 2013 to 2019, CCGBC v NI (2019 prices)



Source: NISRA

With gross weekly wages currently close to £377, CCGBC ranks as the second lowest Borough in terms of the highest average wages of all NI council areas. Only Ards and North Down ranks lower.

Figure 2.21: Average gross weekly wage by Local Council, 2019

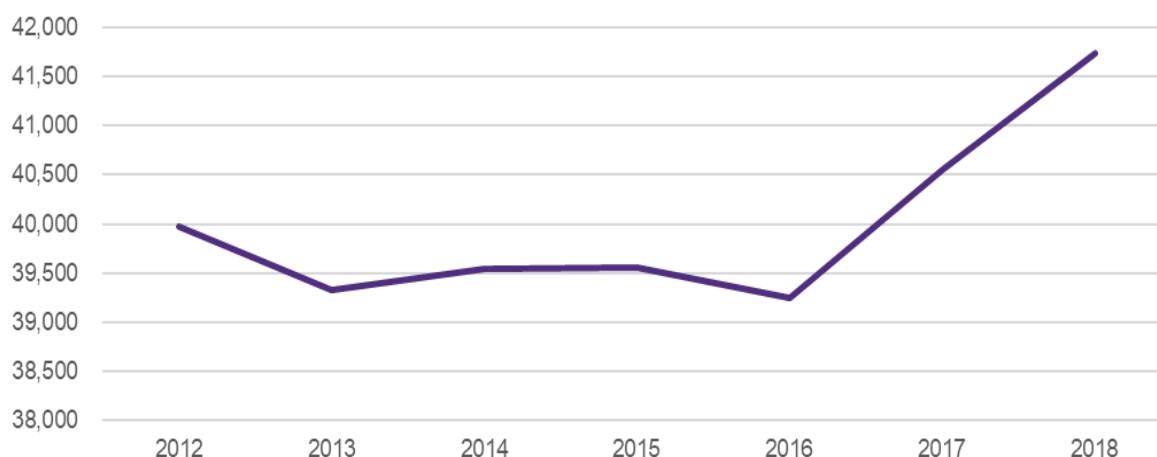


Source: NISRA

2.3.15 Employment profile

The number of employee jobs in the Borough in 2018 is c.1,750 above the level of 40,000 jobs in 2012. This is in line with the growth in employment rate in the Borough from 2012 to 2018 set out at Figure 2.22. Encouragingly, the downturn in employee jobs in the long-tail of the recession has reversed with growth now well established.

Figure 2.22: Employee jobs in CCGBC, 2012 – 2018



Source: NISRA

The pace of employee job growth between 2016 and 2018 in Causeway Coast & Glens is one of the highest in Northern Ireland at 6.3% with only Mid Ulster having faster growth. In the same period, Northern Ireland's employee growth was 4.3%.

Table 2.11: Employee jobs 2016-2018, ranked by percentage change 2016-2018

Local Government District	2016	2017	2018	% change 2016-2018
Mid Ulster	52,372	54,256	56,963	8.8%
Causeway Coast and Glens	39,250	40,556	41,733	6.3%
Derry City and Strabane	54,986	55,821	58,196	5.8%
Lisburn and Castlereagh	54,734	56,027	57,888	5.8%
Newry, Mourne and Down	54,668	56,084	57,618	5.4%
Armagh City, Banbridge and Craigavon	72,866	73,868	76,684	5.2%
Fermanagh and Omagh	39,837	41,764	41,860	5.1%
Northern Ireland	728,116	744,456	759,359	4.3%
Ards and North Down	37,898	38,746	39,294	3.7%
Belfast	218,478	224,098	226,045	3.5%
Mid and East Antrim	42,839	43,490	43,949	2.6%
Antrim and Newtownabbey	60,188	59,747	59,129	-1.8%

Source: NISRA

2.3.16 Employee jobs – Sub regional trends

Employment within the Borough is primarily clustered around the main settlements. Employment can be grouped into four broad areas.

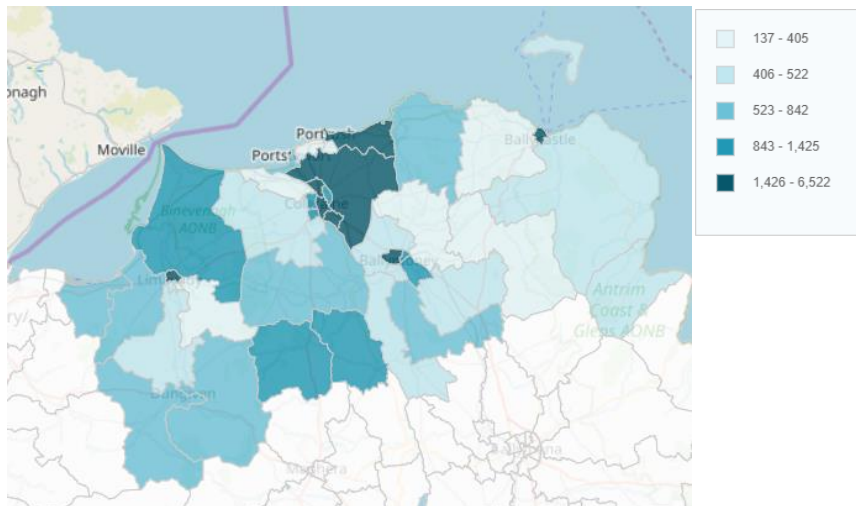
Table 2.12: Employment clusters in CCGBC

Local Government District	2016	2017	2018	% change 2016-2018
Mid Ulster	52,372	54,256	56,963	8.8%
Causeway Coast and Glens	39,250	40,556	41,733	6.3%
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Mid and East Antrim	42,839	43,490	43,949	2.6%
Antrim and Newtownabbey	60,188	59,747	59,129	-1.8%

Source: NISRA

There is a broad split of employment across the CCGBC area. 54.8% of all employment, 21,557 jobs are located in the Coleraine area. Almost a fifth (19.4%) are located in the Limavady area, a total of 7,640 jobs. The remaining jobs are spread between Ballymoney (6,766, 17.2%) and Moyle (3,372, 8.6%). With over 90% of employment, the wider Ballymoney, Coleraine and Limavady areas are the primary employment hubs in the regions.

Figure 2.23: Employee jobs by Ward (2013)



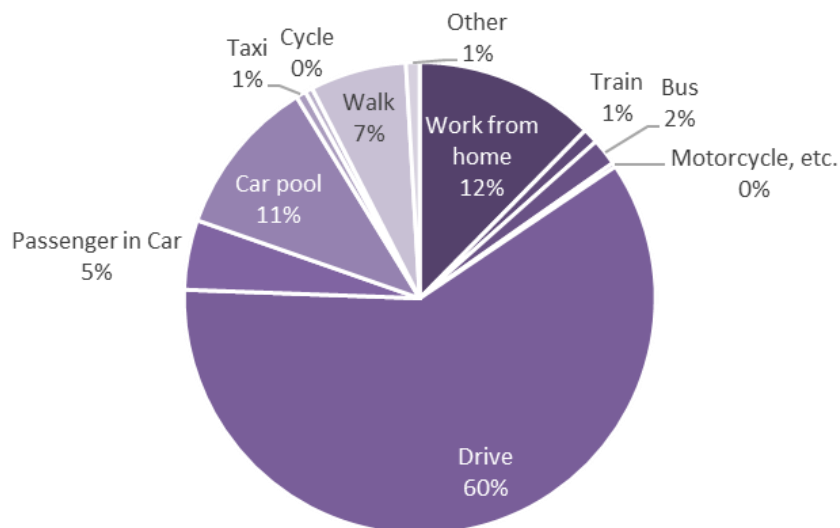
Source: NINIS

2.3.17 Travel to work data

The 2011 census highlighted that 12,393 people left the CCGBC area to their usual place of work and 4,710 entered the Borough from other areas, with a net impact of 7,683 leaving the Borough.

The majority of residents travel by car as a driver (60.0%) or as a passenger (10.9%). A small percentage of residents use public transport, with only 1.8% using the bus and 1.0% using the train. Almost 7% walk to work with a further 12% working from home.

Figure 2.24: Travel to work methods



Source: Census 2011

2.3.18 Sectoral composition

This section provides a high level overview of sectoral structure. The sectoral composition in CCGBC includes: Agriculture (32.6%), Production (16.5%), Construction (8.2%) and Services (42.7%).

Table 2.13: Companies by Sector (2019)

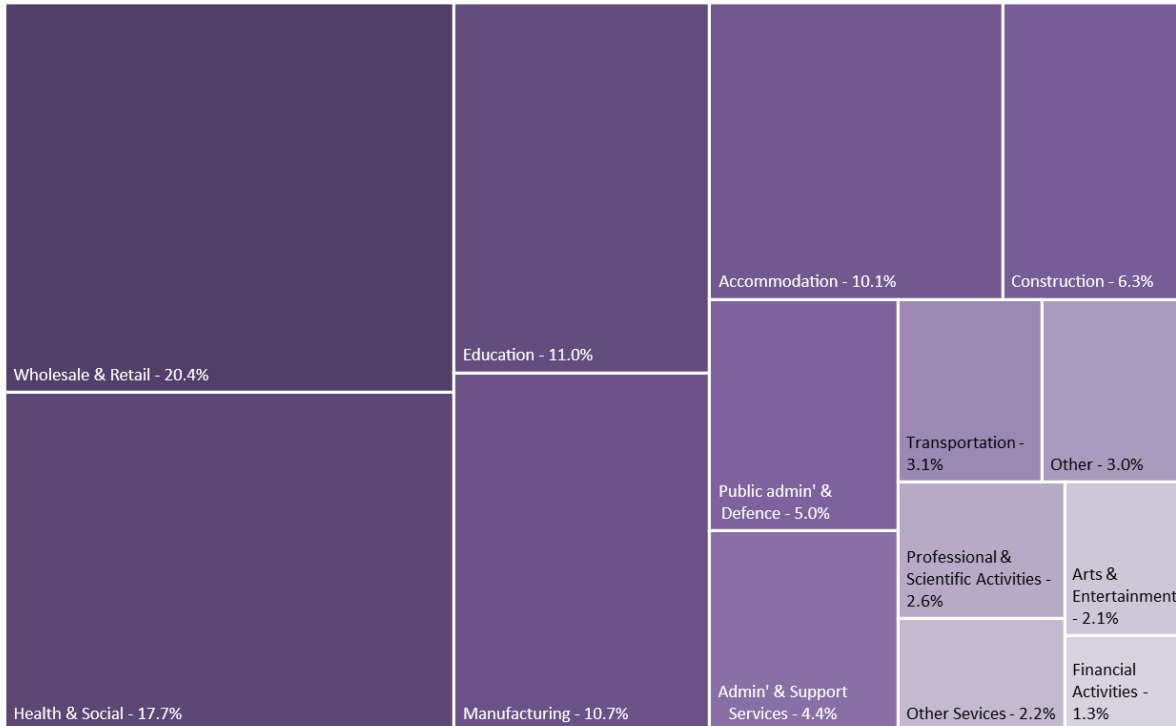
Industry	CCGBC		Northern Ireland
Industry	Number	%	%
Agriculture, forestry & fishing	1,980	32.6%	24.5%
Production	1,005	16.5%	13.9%
Construction	500	8.2%	8.0%
Motor trades	380	6.3%	5.5%
Wholesale	340	5.6%	6.9%
Retail	300	4.9%	6.1%
Transport & storage (inc. postal)	295	4.9%	8.0%
Accommodation & food services	220	3.6%	3.5%
Information & communication	205	3.4%	4.3%
Finance & insurance	185	3.0%	3.6%
Property	175	2.9%	3.7%
Professional, scientific & technical	165	2.7%	3.3%
Business administration and support services	150	2.5%	3.2%
Public administration and defence	75	1.2%	2.7%
Education	55	0.9%	1.7%
Health	45	0.7%	0.9%
Arts, entertainment, recreation and other services	0	0.0%	0.1%
Total	6,075		

Source: Inter Departmental Business Register

2.3.19 Employment structure

In terms of employment by sector, Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles (20.6%) is the largest in the CCGBC area, followed by Human Health and Social Work Activities (17.9%) and Education (11.1%). Approximately 25% of employment in CCGBC is in the public sector.

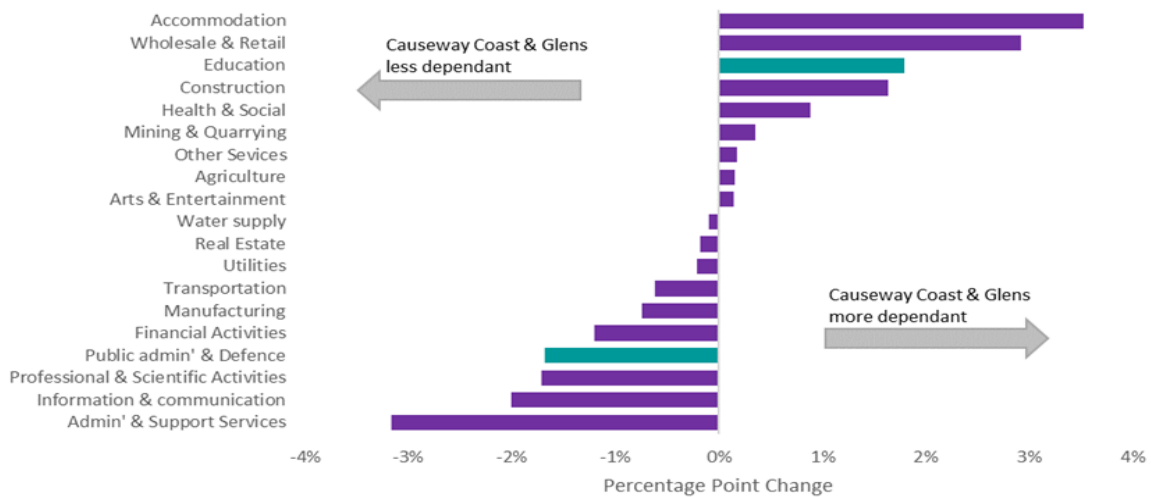
Figure 2.25: Employment by Sector, CCGBC 2018



Source: NISRA, Business Register and Employment Survey

The most dominant sector in CCGBC when compared to Northern Ireland is Accommodation & Food, followed by Wholesale & Retail and Construction. In contrast, CCGBC has a lower concentration of Administrative Services, Information & Communication Services and Professional & Scientific Services than the Northern Ireland average.

Figure 2.26: Relative employment structure – CCGBC Vs Northern Ireland



Source: NISRA, Business Register and Employment Survey

2.3.20 Rural economy

The nature of the sectoral employee statistics is such that they typically underestimate the scale of the Agriculture sector. The Agricultural Census from DAERA provides more insight into the agriculture sector across the Borough. With over 144,006 hectares farmed in the area in 2019 the region has 3,258 farms, representing 10.6% of the Northern Ireland total. There is a concentration of large farms, with 14.6% of all the large farms in Northern Ireland in the CCGBC area. Farm output in 2017 is estimated to be higher in the CCGBC area, with standard output (SO) 16.7% higher than the Northern Ireland average. A proliferation of small farms may suggest limited opportunities for additional employment potential.

Table 2.14: Rural economy indicators

Indicator	Number	% of Northern Ireland total
Number of farms	2,502	10.1%
Area farmed in hectares	144,006	14.1%
SO per farm (€'000) in 2017	91.00	116.7%
Farmers	3,258	10.6%
Large farms	245	14.6%

Source: DAERA Agricultural Census 2019

The majority of land in the CCGBC area is used for grazing rather than crops, with only 5.7% of farmland used for crops compared to 4.4% in Northern Ireland. Sheep farming is the dominant farming category, with almost 400,000 sheep farmed in 2019, 20.0% of the Northern Ireland, reflecting the extent of high land and rough grazing in the borough.

Table 2.15: Animals farmed in CCGBC

Indicator	Number (2019)	% of Northern Ireland total
Cattle	184,020	11.4%
Sheep	396,514	20.0%
Pigs	23,319	3.5%
Poultry	2,445,242	9.9%

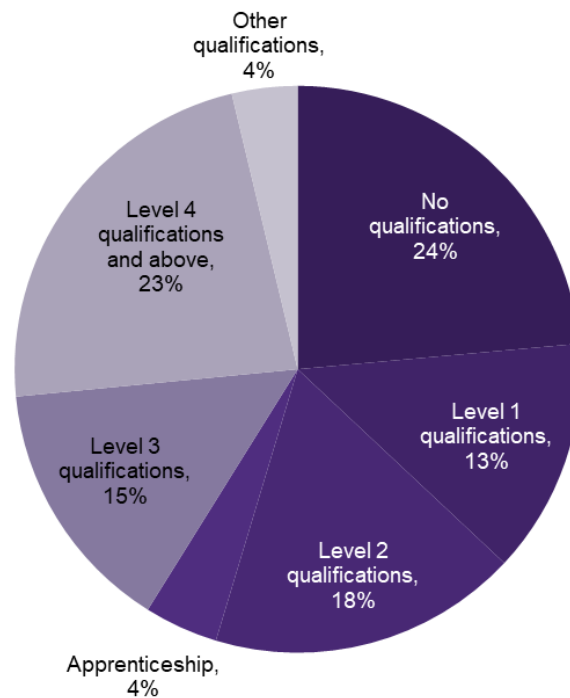
Source: DAERA Agricultural Census 2019

The wider rural economy plays a significant direct role in the CCGBC economy, with a wider impact through local supply chain. The major challenge facing the rural economy is Brexit, with multiple implications through potential losses of subsidies, to impacts on labour availability and potential tariffs on exports, depending on the terms of the future economic relationship with the EU.

2.3.21 Qualifications

The most comprehensive assessment (in terms of sample sizes) of skills of residents in the Borough is the 2011 Census. This showed a Borough where close to one in four working age residents did not have any formal qualifications and close one in four holding level 4 (i.e. degree level). For context, the proportion qualified to level four was three percentage points lower than the NI average of 26%. In addition, the proportion aged 16-64 with 'no qualifications' was 3% higher than the NI average of 21%. There is a lower skilled labour force than the NI average.

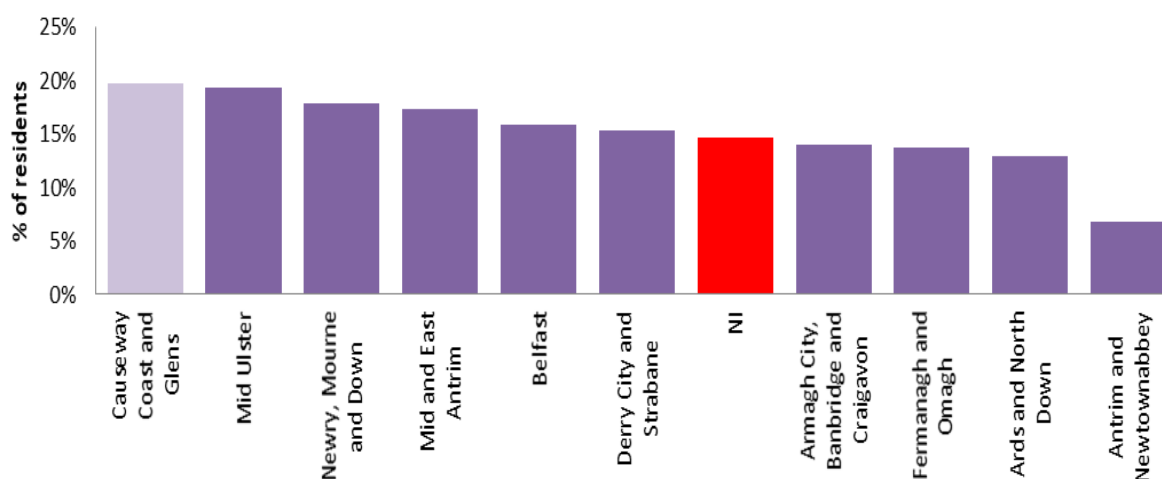
Figure 2.27: Qualifications (16-64 years), Causeway Coast & Glens, 2011



Source: Census 2011

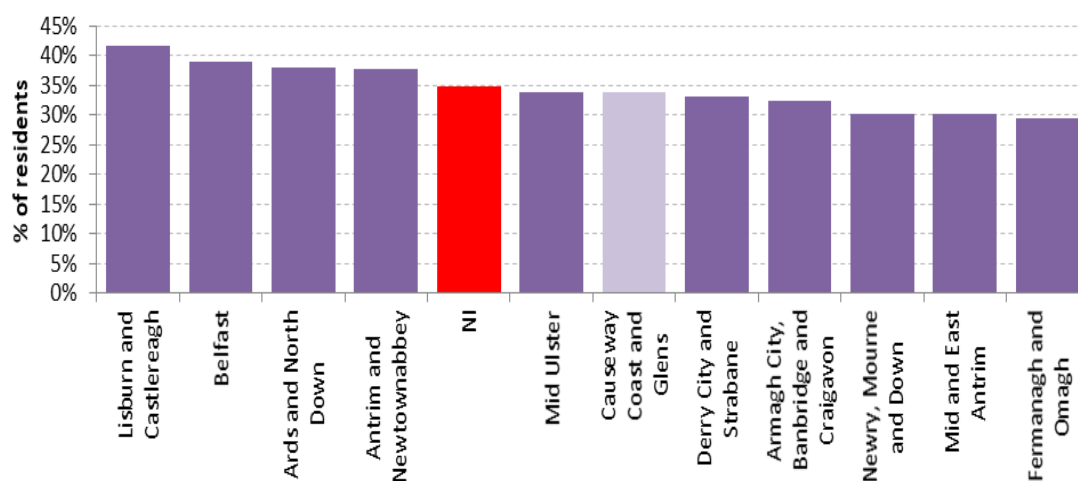
The Labour Force Survey Local Area Database does provide more up to date figures for local skills, albeit with a reduced sample. It records that the number of working age people with no qualifications in 2018 has decreased to 20%, considerably worse than the NI average of 15% and is the lowest ranked Council in the context of NI's Council areas. At the other end of the skills spectrum, it is a slightly better relative position for Causeway Coast & Glens. The number of working age people reported as holding level 4 or above qualifications is 34%, a figure which is more broadly aligned with the NI average of 35% and better than five of the other Council areas.

Figure 2.28: % 16-64 with no formal qualifications, NI Regions, 2018



Source: Labour Force Survey, Local Area Database

Figure 2.29: % 16-64 with 4+ qualifications, NI Regions, 2018



Source: Labour Force Survey, Local Area Database

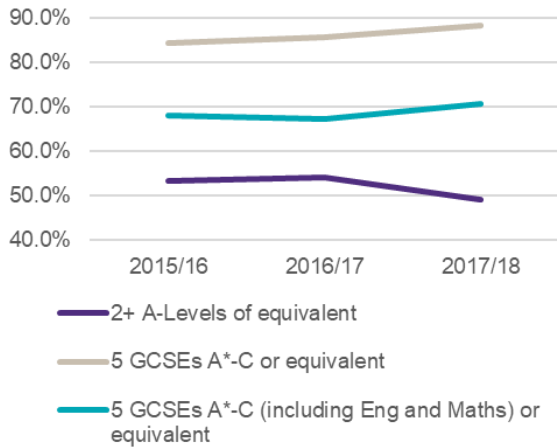
2.3.22 Skills pipeline: School leaver attainment

In 2018 49% of school leavers in CCGBC left with 2 or more A Levels grades A-E (eight percentage points lower than NI average of 57%); 88% left with 5 or more GCSE's grades A-C (three percentage points higher than the NI average of 85%) and 71% left with 5 or more GCSE's grades A-C including English and Maths (in line with the NI average of 71%). While attainment levels of students achieving 5 or more GCSE's have largely improved across both CCGBC and Northern Ireland, the percentage of school leavers with 2 or more A Levels grades A-E decreased in 2018 relative to 2016 in CCGBC. This was consistent with the trend in Northern Ireland as a whole.

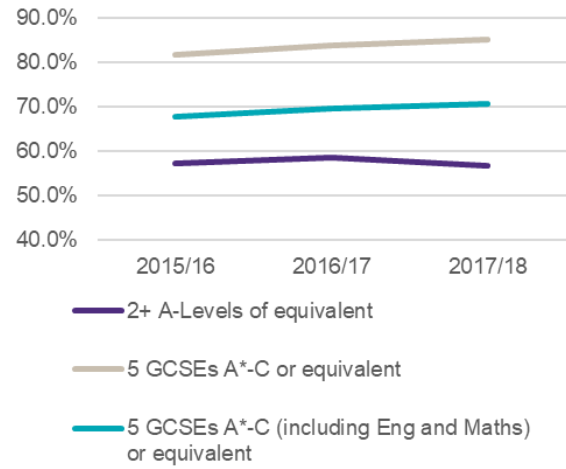
While CCGBC has ranked in the top half of school leavers attaining 5 or more GCSE's grades A-C, the Borough has ranked in the bottom half of all council areas relating to school leavers attaining 2 or more A Levels grades A-E and school leavers attaining 5 or more GCSE's grades A-C including English and Maths.

Figure 2.30: Educational Attainment by School Leaver

Causeway Coast & Glens



Northern Ireland

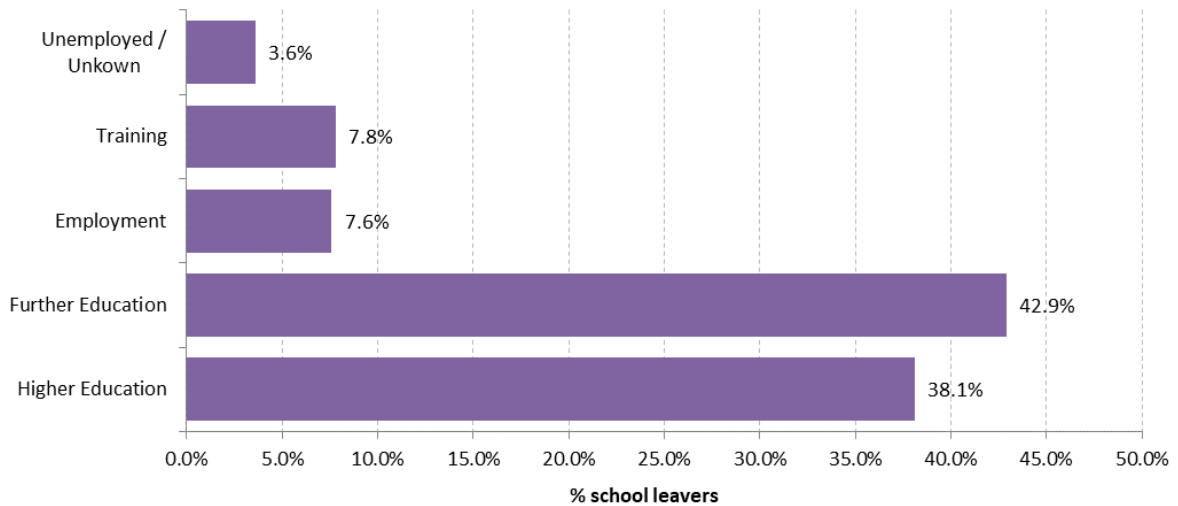


Source: Education NI

The figure below presents the destination of school leavers within CCGBC, highlighting that 81% progress to Higher and Further Education.

Although, the proportion of local school leavers entering higher education (38.1%) fell below the Northern Ireland average (43.1%). The share of school leavers in CCGBC entering further education (42.9%) was above the NI average (33.5%).

Figure 2.31: Destination of school leavers, Causeway Coast & Glens, 2017/18



Source: Education NI

2.3.23 Visitor attractions

With a growing NI wide tourism offer and active policy and marketing focus, there is a significant potential for Causeway Coast & Glens to benefit from improving the local tourism offer. A selection of the visitor attractions in CCGBC as listed by Visit Causeway Coast and Glens are:

- Ballintoy Harbour
- Barry's Amusements
- Benone Complex & Strand
- Binevenagh Nature Reserve
- Bushmills Distillery
- Carrick-a-Rede Rope Bridge
- Dunluce Castle
- Giant's Causeway
- Kinbane Castle
- Mussenden Temple
- Rathlin Island
- Royal Portrush Golf Club
- The Dark Hedges

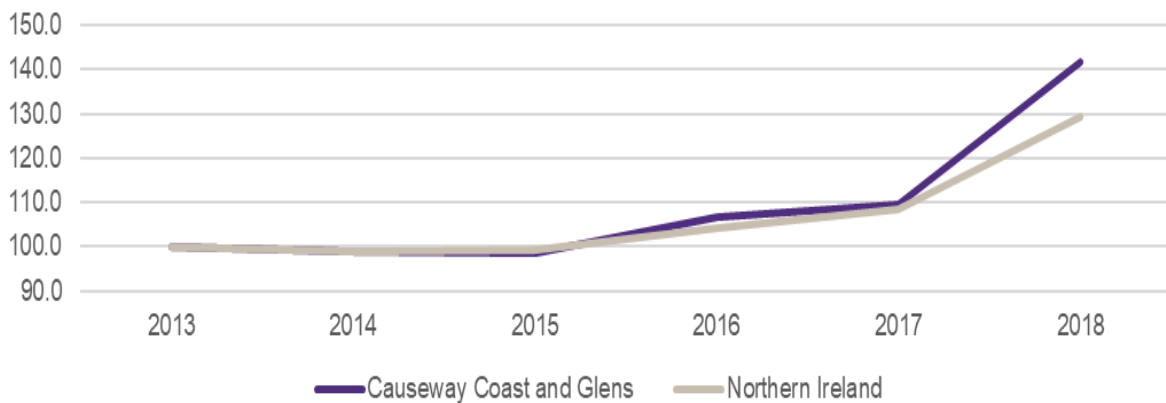
This list shows a predominance in coastal attractions. However, within existing designations such as the AONBs there are a range of attractions and stop off points. There remains an opportunity to develop these non-coastal sites and bring some balance between coast and countryside.

In 2018, there was a total of 2,538,877 visits to visitor attractions in CCGBC. The most popular visitor attractions were: Giant's Causeway World Heritage Site (1,039,243) - representing a 38% increase on the level from 2013 – and ranked 1st in Northern Ireland by visitor numbers; followed by Carrick-a-Rede Rope Bridge (491,947) – ranked the 4th in Northern Ireland by visitor numbers; and Roe Valley Country Park (310,000).

2.3.24 Availability of Accommodation

In 2018, there were 14,239 beds available in CCGBC, accounting for 28% of all beds available in Northern Ireland. Between 2013 and 2015, certified accommodation stock in CCGBC decreased to a minimum level of 9,921 beds. The number of beds has increased each year from 2016, with a large increase of 3,229 beds in 2018. Stock across NI declined between 2013 and 2015 has rose sharply each year between 2016 and 2018, following a similar trend to that of CCGBC.

Figure 2.32: Indexed changes in certified accommodation stocks, 2013 - 2018, CCGBC v NI

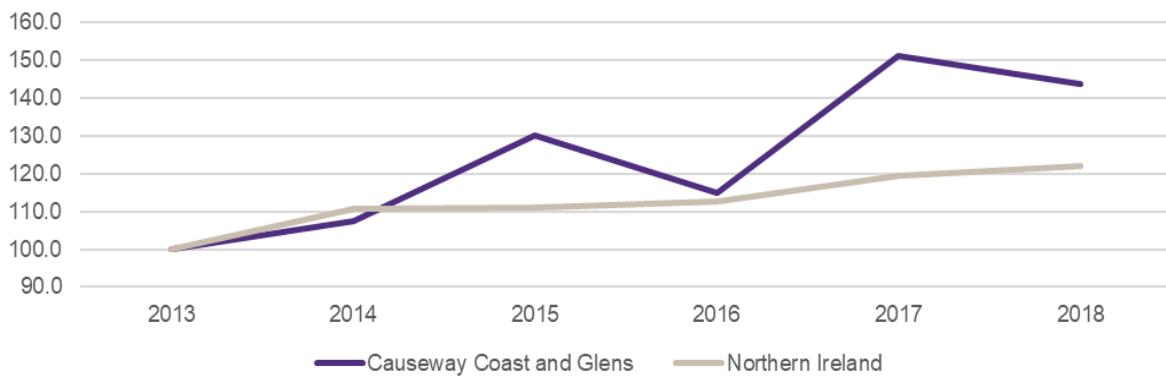


Source: NISRA

2.3.25 Trips

Between 2013 and 2018 the total number of trips to CCGBC area increased by 44%, while the NI wide number of trips increased by 22%. This trend in CCGBC was driven by sharp increases in 2015 and 2017, with subsequent decreases in both 2016 and 2018.

Figure 2.33: Indexed changes in trips, 2013 – 2018, CCGBC v NI

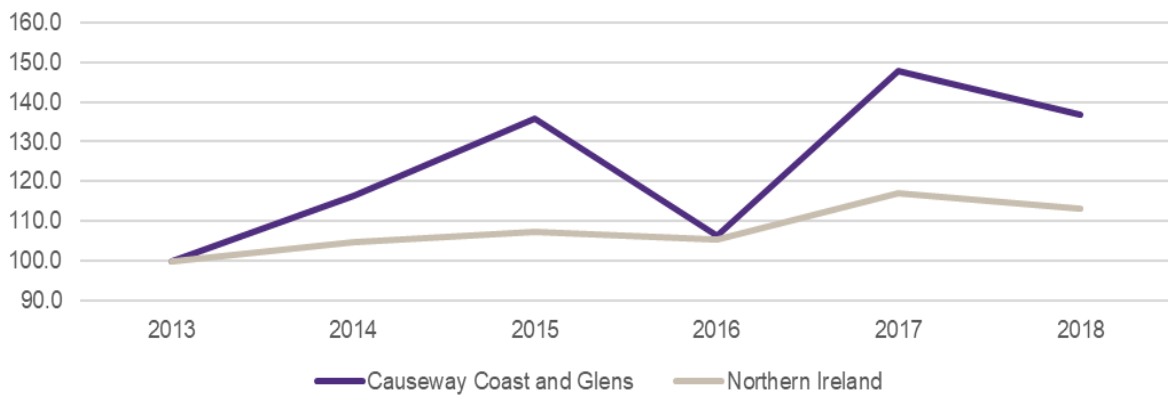


Source: Local Government District Tourism Statistics

2.3.26 Nights

The number of visitor nights in CCGBC has followed a similar trend as the number of trips, increasing between 2013 and 2015 and in 2017, with decreasing visitor nights in both 2016 and 2018. In 2018 total visitor nights in CCGBC were 3,177,569, which is circa 850,000 more than in 2013.

Figure 2.34: Indexed changes in visitor nights, 2013 – 2018, CCGBC v NI

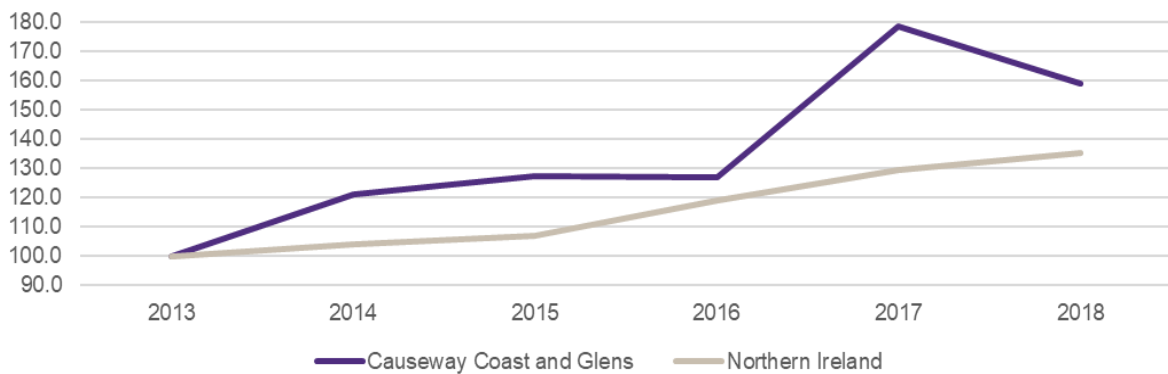


Source: Local Government District Tourism Statistics

2.3.27 Spend

Between 2013 and 2018, visitor spend in the Borough has increased by 59% to £172m. The peak in this period was in 2017, when visitor spend was £194m. CCGBC compares well in comparison to Northern Ireland as a whole, with visitor spend increasing by 35% for the same period.

Figure 2.35: Indexed changes in visitor spend, 2013 – 2018, CCGBC v NI



Source: Local Government District Tourism Statistics

2.3.28 Tourism Employment

In 2017, employment associated with the tourism industry in the Borough amounted to 5,006 jobs, which accounts for 8% of the Northern Ireland total. This includes jobs in the following areas: accommodation for visitors; food, beverage serving activities; transport; and sporting and recreational activities.

2.4 CCGBC v Other Northern Ireland Councils

In order to assess how CCGBC is performing, a benchmarking exercise across a range of indicators has been undertaken. This exercise focused on CCGBC's performance when compared to the other 10 Northern Ireland Council areas, assessing against 24 unique indicators.

CCGBC scores poorly in relation to the percentage of young people, average business size, employment levels (16-64), GCSE and A-Level attainment, employee jobs per capita, median wage, population forecasts, population growth and no formal qualification.

When compared to other Northern Ireland Councils, CCGBC ranks Excellent in 2/24 indicators, Good in 7/24 indicators, Moderate in 6/24 indicators and Poorly in 9/24 indicators. CCGBC does not rank first in any indicator, however does rank second in relation to visitor nights and visitor trips and spend, behind only Belfast in each of these indicators.

These rankings suggest a number of things about the Borough. It has an ageing demographic, comparably lower education levels to other Councils and a higher proportion of smaller businesses which do not pay as well. While the relationship between these is unclear, it is likely there is a correlation between having smaller businesses, who pay less, and employment and economic activity levels.

Table 2.16: CCGBC benchmark v Northern Ireland Councils

Ranking	Indicator
Excellent (Ranks 1-2)	<ul style="list-style-type: none"> - Visitor nights - Visitor trips and spend
Good (Ranks 3-5)	<ul style="list-style-type: none"> - % over 65 population - Crime levels - Number of £100k plus businesses - Number of businesses per capita - Employment deprivation - Farm output - Income deprivation
Moderate (Ranks 6-8)	<ul style="list-style-type: none"> - Above NVQ level 4 qualifications - Number of small businesses (less than 50 employees) - TEA levels - % working age population - Economic activity (16-64) - Population size
Poorly (Ranks 9-11)	<ul style="list-style-type: none"> - % of young people - Average business size - Employment levels (16-64) - GCSE and A-Level attainment - Employee jobs per capita - Median wage - Population forecasts - Population growth - No formal qualifications

Source: Grant Thornton analysis



3 Identifying growth opportunity sectors

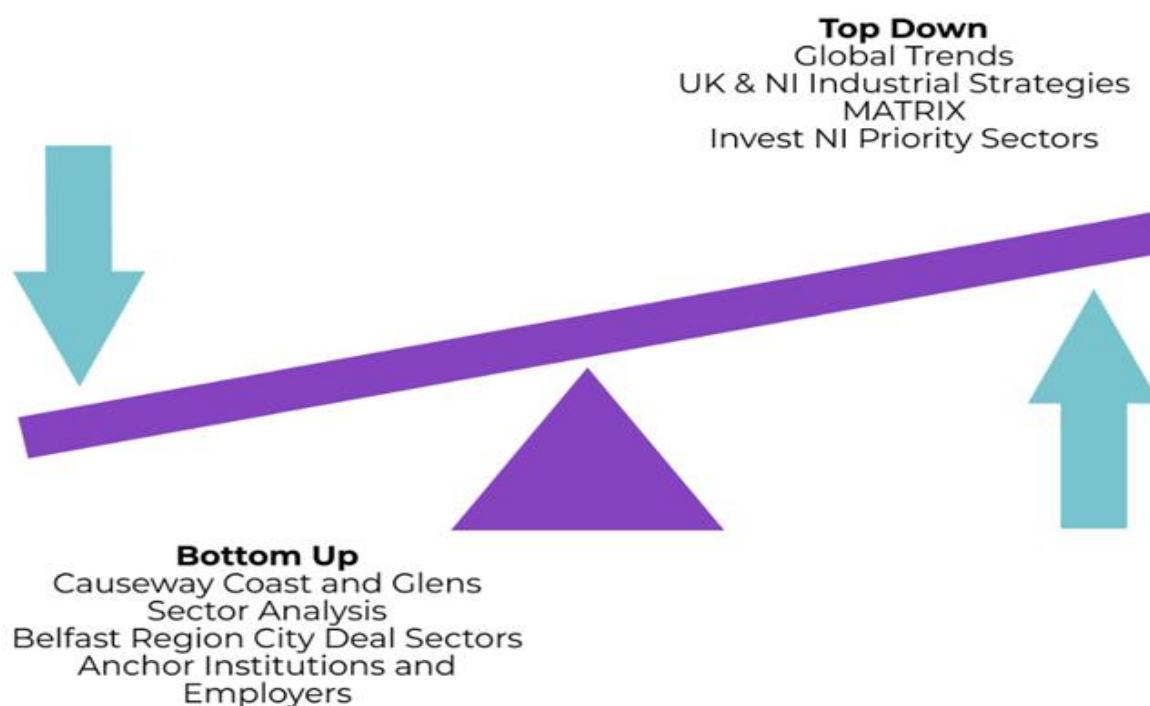
3. Identifying growth opportunity sectors

3.1 Introduction

This section assesses the potential priority sectors for Causeway Coast and Glens (CCGBC). Identifying sectors in the CCGBC area requires a holistic look at the local, regional and national economies, considering sectors of advantage at each of these levels and the role of these sectors within the borough, now and in the future. As many local businesses operate and are impacted by the global economy, identifying sectors of advantage must consider global trends. The current global landscape is fast moving, with technology changing the way business and consumers function. Increasingly there is convergence between sectors, again with technology playing a key role in blurring the lines between sectors.

This analysis takes a top down and bottom up approach to identify sectors of advantage within the CCGBC area. Figure 3.1 below presents an overview of this approach which includes a top down review of key global economic trends and strategic sectors at a UK and NI level and the bottom up analysis of the sectors at CCGBC borough level.

Figure 3.1 Overview of approach



This approach will identify a long list of sectors in which CCGBC have a strength or competitive advantage. The long-list of sectors will be categorised into the following segments.

Focus and Step Challenge: These are ‘critical for growth’ sectors which are considered likely to have the potential to support significant economic growth. These are sectors against which to prioritise resource and effort as a key economic development opportunity for CCGBC.

Sustain and Grow: These are important core sectors for CCG’s economic development, with potential to enable (potentially significant) incremental growth. These are sectors which should be cultivated and nurtured to support future economic growth.

Monitor and Intervene: These are sectors which, although they may be important to the current local economy, are not considered likely to generate material economic growth moving forward. These sectors should be monitored on an on-going basis for opportunities and trends which might create potential for future economic development, and interventions made accordingly.

3.2 Identifying priority sectors and trends that will impact upon them

Top down review

There are a range of strategies, policies, plans and research documents which present sectors of importance at different geographical and administrative levels. In undertaking this top down review, a review of the sectors identified in the following has been undertaken.

- UK Industrial Strategy 2017
- Economy 2030 – NI Draft Industrial Strategy
- Matrix NI (range of research documents)
- Invest NI Business Plan 2017-2021
- Rebuilding a Stronger Economy (Department for the Economy, 2020)

This review has identified three main trends:

- There are three sectors which sit within the UK industrial strategy which are considered to have a level of competitiveness/importance in Northern Ireland – Construction, Creative and Digital Tech and Life and Health Sciences.
- Three sectors are identified by all the NI focused documents as being priorities for NI but are not identified in the UK Industrial Strategy – Advanced Manufacturing, Materials and Engineering; Agri-Food; and Financial Business and Professional Services*.
- The Department for the Economy’s response to Covid-19 identifies sectors that could provide high paying jobs as part of the economic recovery. These are: Advanced Manufacturing, Life and Health Science, Clean energy, and Digital.

Some definitions:

Advanced manufacturing - production processes that rely on cutting-edge science and technology research. ... It also includes generic high-tech processes, such as automation and robotics, which can give a range of products a competitive advantage in terms of cost or environmental impact.

Materials and Engineering - working with metals, ceramics, and plastics to create new materials

Agri-foods - agriculture, horticulture, and food and drink processing technologies

Financial Business and Professional Services - covers a range of diverse knowledge- intensive industries and support functions (e.g. call centres and other business support services), which provide specialised support to businesses and the public sector.

Table 3.1: Overview of approach

Strategic Focus	UK Industrial Strategy	Economy 2030	Matrix NI	Invest NI	Rebuilding a stronger economy
Advanced Manufacturing, Materials and Engineering		✓	✓	✓	✓
Aerospace	✓	✓			
Agri-food		✓	✓	✓	
Automotive	✓				
Construction	✓	✓		✓	
Creative and Digital Technology	✓	✓	✓	✓	✓
Financial Business and Professional Services			✓		
Life and Health Sciences	✓	✓	✓	✓	✓
Green/Clean					✓

Source: Grant Thornton analysis

Beyond established sectors, the Draft NI Industrial Strategy – NI 2030 identifies the following sector growth opportunities:

- Cybersecurity - Digital technology/Financial, Business and Professional Services
- Legal services technology – Digital technology/Financial, Business and Professional Services
- Precision medicine – Life and Health Sciences
- Big data / Internet of things – Digital Technology

These are a combination of niche sectors and cross cutting technology platforms which will impact multiple sectors.

Bottom up review

The bottom up review focuses on the following:

- Comprehensive analysis of sector performance within the Causeway Coast and Glens area and sector attributes focusing on sectors defined by Standard Industrial Classifications (SIC);
- Mapping of anchor firms and institutions;
- Review of regional level policies identifying key sectors; and
- Views from across the Causeway Coast and Glen borough on where opportunities lie.

3.2.1 Analysis of Causeway Coast and Glens Sector Performance

Analysis of Sector performance considers the performance of sectors within the CCGBC area against a range of indicators as identified below. A holistic look at the performance of sectors against these indicators creates a clear picture of which sectors generate economic and employment output, are growing, are highly concentrated in CCGBC and are internationally engaged via exports. These attributes point to various levels of competitiveness, which CCGBC can build on to support development.

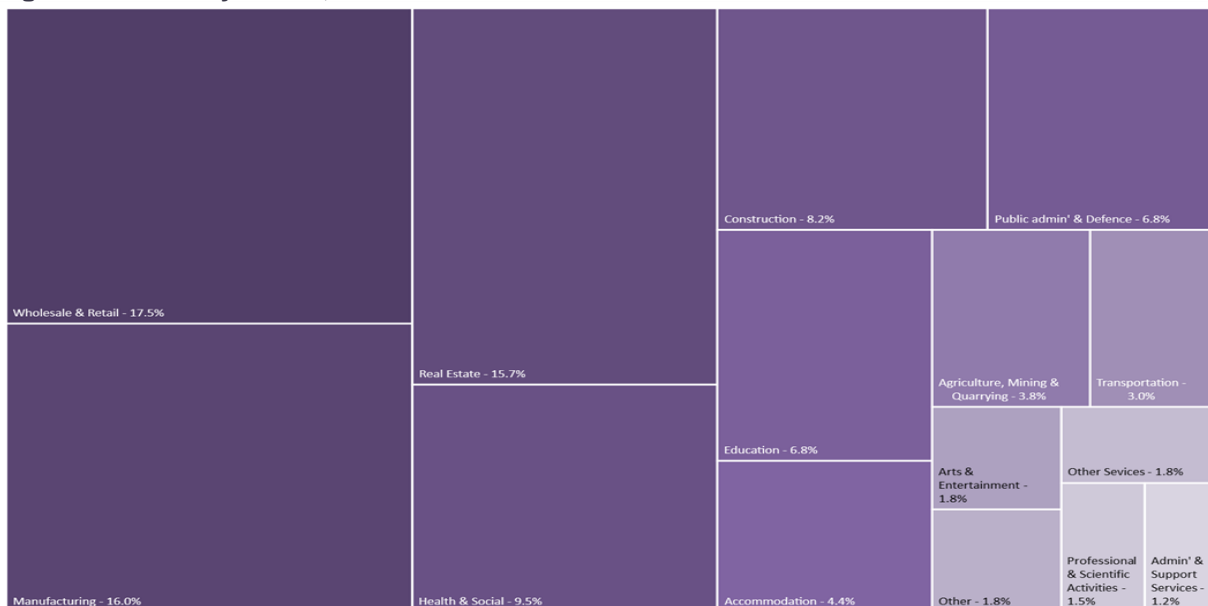
Figure 3.2: Indicators of Competitive Advantage



GVA Trends

Gross Value Added (GVA) is the measure of the value of goods and services produced in an area, industry or sector of an economy. Figure 10.3 below presents an overview of the contribution of each sector within the CCGBC area to the £2.1bn of output generated in 2018, representing 5% of overall output for NI. CCGBC top five sectors consist of Wholesale & Retail (17.5%), Manufacturing (16.0%), Real estate (15.7%), Health & Social (9.5%) and Construction (8.2%), which made up a total 67% of output in 2018.

Figure 3.3: GVA by sector, CCGBC 2018

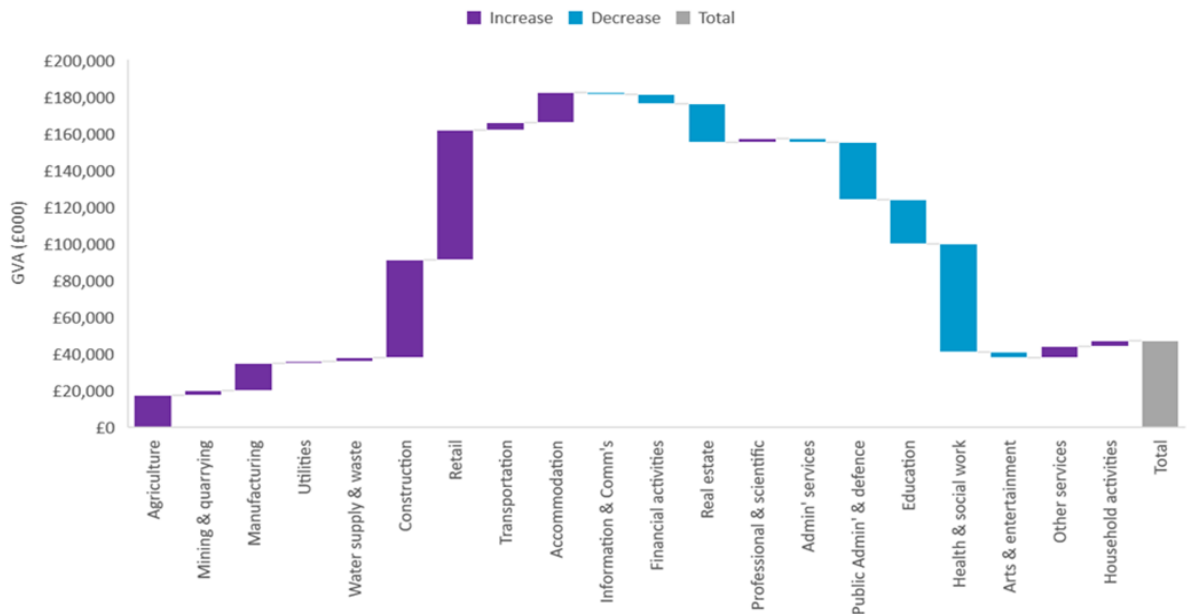


Source: ONS – Regional accounts

Notes: Other represents those sectors with less than 1% proportion of GVA including – Mining and quarrying, water supply, financial activities, household activities and utilities.

Since 2012, the CCGBC economy produced an additional £47 million in GVA. The largest contributors to this were Retail (£71m), Construction (£53m) and Agriculture (£17m). In terms of growth, construction saw the largest increase of 44.5% from 2012 averaging at approximately 6.3% growth per annum. This was then followed by Agriculture (39.9%) and Utilities (25.0%).

Figure 3.4: GVA changes by sector, CCGBC 2018

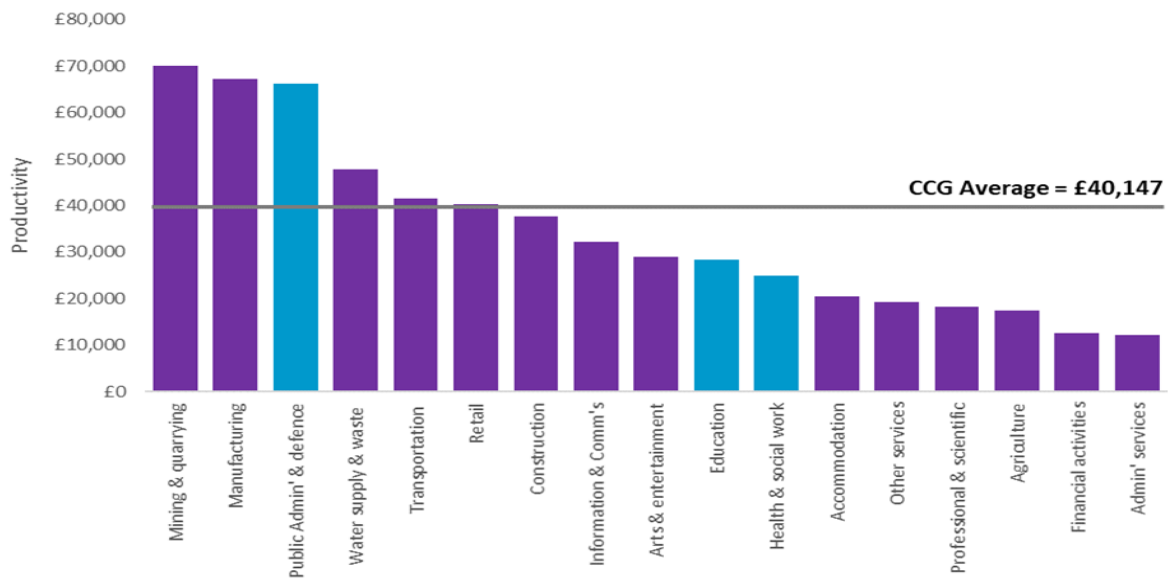


Source: ONS – Regional accounts

Productivity

Productivity is key component in measuring the health of an economy and how productive each sector is in terms of its output per worker. The more productive a sector is, the more output it can produce per worker, meaning that any growth within a highly productive sector with boost growth further within the local economy. In 2018 average productivity per worker in CCGBC was just under £40,150. The Real Estate sector was by far the most productive (£701,470) followed by Utilities (£123,290) and Mining & Quarrying (£70,880). However, these are highly capital-intensive sectors with commonly low employment and therefore distort the figures. Outside of these sectors, the Manufacturing sector has the highest productivity levels (£67,240) and is in par with the NI average.

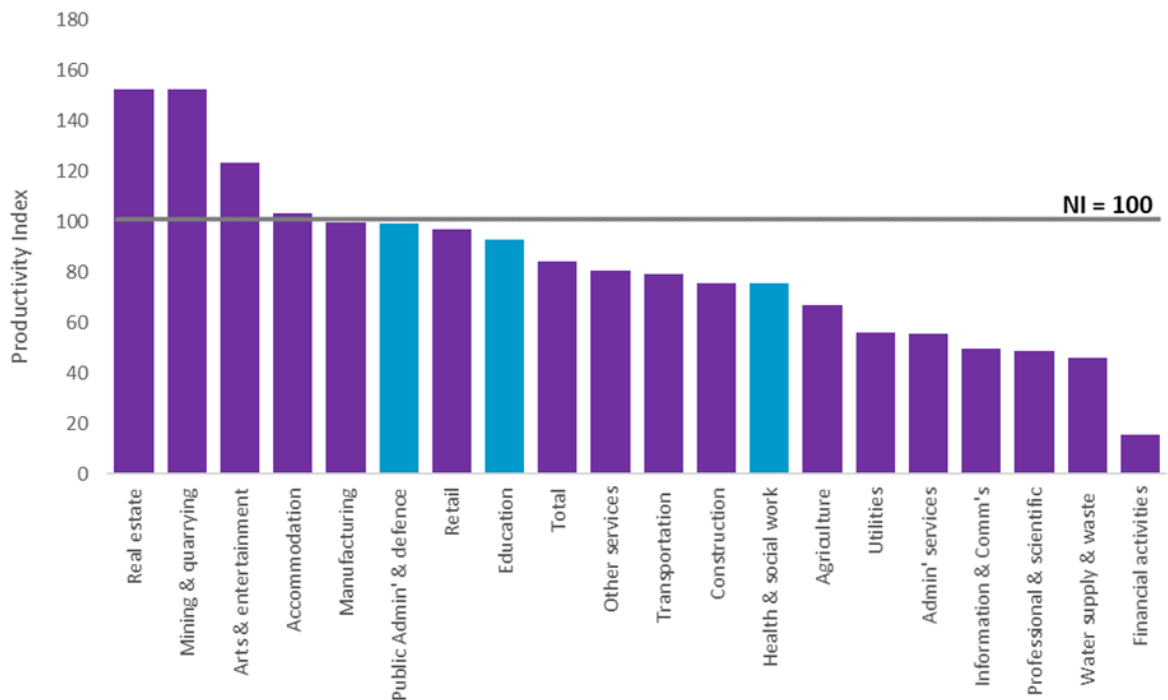
Figure 3.5: GVA per employee by sector, CCGBC 2018



Source: ONS – Regional accounts & BRES

However, productivity levels as a whole in CCGBC lag the NI average, with only two out of the remaining fifteen broad sectors being above its NI counterpart (Arts & Entertainment 23% and Accommodation 4% above). The Financial activities, Professional & Scientific and Information & Comm's sectors highlight that CCGBC is in a disadvantageous position in regard to productivity, with each sector falling below the NI average by 75%, 51% and 50% respectively. As these sectors are commonly known to be highly productive sectors, this poses an issue which CCGBC will need to address if they wish to increase output further.

Figure 3.6: GVA per employee by sector (NI = 100), CCGBC 2018



Source: ONS – Regional accounts & BRES

Since 2012, on average CCGBC productivity has grown by 2.3%. Agriculture saw the largest increase growing at approximately 10.6% per annum, followed by the Financial Activities (6.3%) and Construction (4.9%) sectors.

Table 3.2: GVA per employee by sector CAGR, CCGBC 2001-18

	2001-08	2008-12	2012-18
Agriculture	-4.25%	-10.4%	10.6%
Mining & quarrying	-1.87%	-13.6%	1.2%
Manufacturing	2.37%	10.8%	0.8%
Utilities	2.50%	-1.6%	-3.0%
Water supply & waste	8.19%	-4.0%	0.4%
Construction	0.16%	2.4%	4.9%
Retail	1.28%	4.8%	2.7%
Transportation	2.78%	-6.7%	4.6%
Accommodation	3.14%	-2.8%	1.6%
Information & Comm's	-2.04%	6.2%	1.6%
Financial activities	3.55%	11.9%	6.3%
Real estate	-12.60%	-5.4%	4.3%
Professional & scientific	1.73%	2.8%	1.3%
Admin' services	1.43%	1.7%	2.4%
Public Admin' & defence	0.98%	1.1%	3.5%
Education	-0.28%	-0.4%	-1.0%
Health & social work	2.53%	4.6%	2.0%
Arts & entertainment	0.42%	-2.8%	0.5%
Other services	-0.23%	3.3%	-3.2%
Total	0.01%	2.1%	2.3%

Source: ONS – Regional accounts & BRES

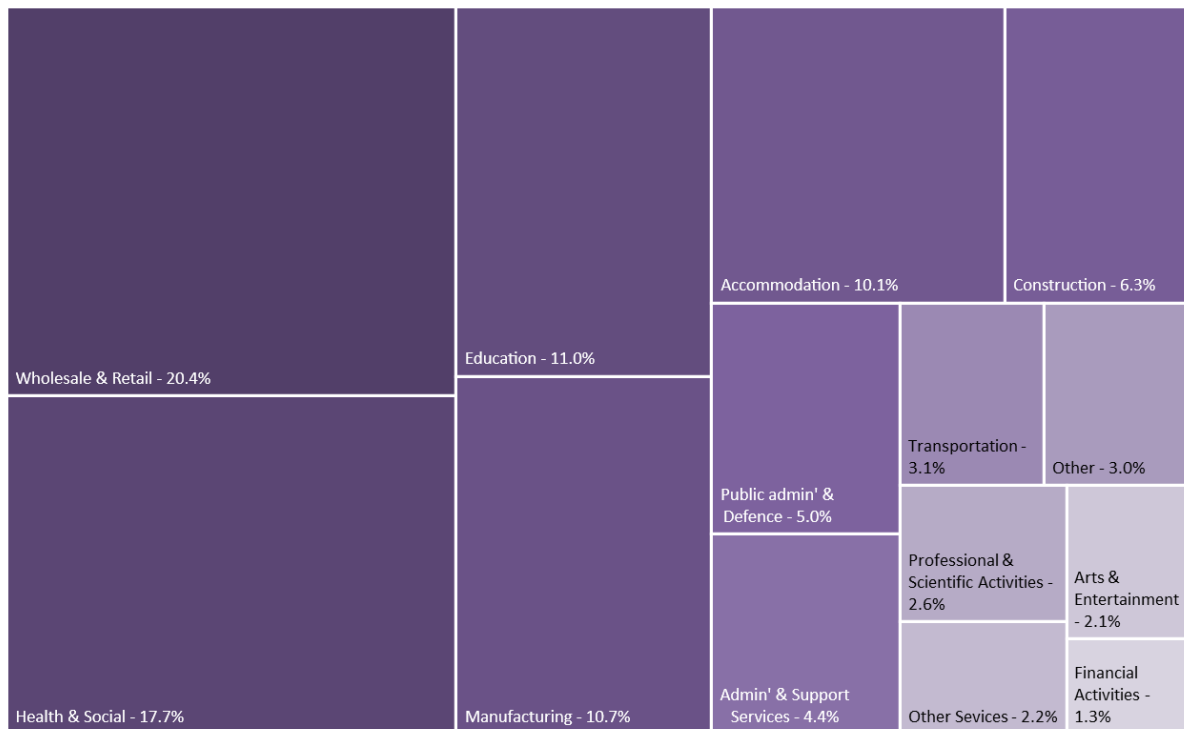
Employment Trends

CCG's employment is heavily dependent upon its public sector which – combined - employs 29% of its total workforce.

The retail sector is the highest overall “standalone” employer, employing 17.5% of the labour force. Followed by health and social (15.2%), education (9.6%), manufacturing (9.6%) and construction (8.8%), with these top five sectors combined making up 60.6% of total employment in the CCGBC area.

This is consistent with Northern Ireland's trends.

Figure 3.7: Employment by sector as % of total, CCGBC 2018



Source: NISRA - BRES

In terms of employment change, there has been significant fluctuations in employment across various sectors since 2001, which have been driven by broader economic conditions. Similar to the rest of the LGDs, CCGBC somewhat benefited from the 'boom' period of 2001-08 with all but four sectors experiencing significant levels of growth and total employment on average growing by 0.8% per annum.

However, the financial crisis (the 'bust' period) of 2008-12 has a damaging effect on the labour market with the majority of sectors experiencing a loss in employment, with the labour market contracting on average by 1.8% per annum. In contrast to NI trends, CCGBC has not experienced the significant 'recovery' period of 2012-18 and have instead seen a number of sectors continue to experience job losses, with the area overall failing to get back to or surpass pre-recession growth.

Table 3.3: Total employment CAGR, CCGBC 2001-18

	'Boom' 2001-08	'Bust' 2008-12	'Recovery' 2012-18
Agriculture	-1.1%	0.4%	-3.2%
Mining & quarrying	0.4%	12.4%	-2.7%
Manufacturing	-4.3%	-5.4%	5.0%
Utilities	-3.1%	14.7%	12.7%
Water supply & waste	2.9%	0.5%	5.1%
Construction	1.2%	-12.4%	2.1%
Retail	2.0%	-2.0%	-0.2%
Transportation	0.2%	2.3%	-3.3%
Accommodation	0.5%	1.3%	2.0%
Information & Comm's	3.5%	-3.8%	-0.6%
Financial activities	2.3%	-2.0%	-2.7%
Real estate	13.8%	5.2%	-3.6%
Professional & scientific	4.4%	-7.2%	3.7%
Admin' services	5.3%	-1.7%	4.1%
Public Admin' & defence	-0.7%	-1.8%	-3.7%
Education	0.6%	-1.4%	-1.4%
Health & social work	2.1%	4.3%	-0.4%
Arts & entertainment	3.3%	1.1%	-0.1%
Other services	2.9%	-0.3%	6.6%
Total	0.8%	-1.8%	0.3%

Source: ONS – Regional accounts & BRES

Location quotient (LQ) is an approach in which quantifies how concentrated a particular sector is in a region as compared to the national concentration, and is used as another lens into the relative competitiveness and advantage of that particular area. In calculating Location Quotient, the concentration of employment in the CCGBC area relative to the NI wide concentration has been used.

The top ranked sector is Mining and Quarrying, with a Location Quotient of 2.1 demonstrating a significant concentration in employment. In addition, Agriculture, Accommodation and Construction all have a Location Quotient well above 1 which indicates that there is a higher concentration than the NI average in those sectors which are seen as lower productivity sectors.

Table 3.4: Location Quotients, CCGBC 2018

Sector	Location Quotient
Mining & quarrying	2.1
Agriculture	2.0
Accommodation	1.5
Construction	1.4
Other services	1.1
Education	1.1
Retail	1.1
Arts & entertainment	1.1
Health & social work	1.0
Manufacturing	0.9
Water supply & waste	0.8
Transportation	0.8
Real estate	0.8
Public Admin' & defence	0.7
Professional & scientific	0.6
Admin' services	0.6
Financial activities	0.5
Information & Comm's	0.3
Utilities	0.2

Source: ONS – Regional accounts & BRES

Export Trends

The NI Economic Strategy notes that export led growth is a key driver in the overall competitiveness of the economy, citing that there is a need to both grow exports and diversify into new markets. Latest statistics suggest that NI companies exported £11.2bn of goods and services in 2018, with just under 58% of exports coming from the manufacturing sector. The retail sector also contributed a significant 18.4% to total exports, as well as Information and Comm's with a total of 6.2% coming from the sector.

Table 3.5: Total exports - NI 2018

	Total Exports (£m)	% of total
Agriculture	38	0.3%
Mining & quarrying	41	0.4%
Manufacturing	6,456	57.8%
Utilities	*	*
Water supply & waste	130	1.2%
Construction	447	4.0%
Retail	2,051	18.4%
Transportation	333	3.0%
Accommodation	*	*
Information & Comm's	696	6.2%
Real estate	4	0.0%
Professional & scientific	349	3.1%
Admin' services	546	4.9%
Other	34	0.3%
Total	11,160	100.0%

Source: ONS – Regional accounts & BRES

Export statistics at a LGD level is unavailable, however data from NISRA regarding Ports traffic (which includes 'Larne Port' the closest port to the CCGBC area) was accessible. The key findings show that the port generates 12.1% of total outward traffic in NI, with countries such as Cyprus, Denmark and Spain trading with the port.

Anchor firms and institutions

Anchor firms and institutions play a significant social, economic and community role within an area. They generate employment and are active in the social (and sometimes community) sphere. They can be defined as:

- Large employers with a long history in the borough.
- Institutions with fixed assets embedded in the area meaning there is limited scope that they will relocate.

Understanding an area's anchor firms and institutions and their sectors is important when identifying sectors of opportunity, as often there will be significant cross over. A review of large firms and organisations in the CCGBC area has identified the following anchor firms and institutions:

Table 3.6: Anchor firms and institutions, CCGBC

<i>Strategic focus</i>	<i>Anchors</i>
Advanced Manufacturing, Materials and Engineering	Bemis Healthcare Packaging Limited
Agri-Food	None but a wide range of agriculture across the Borough
Construction	Dowds Electrical (Holdings) Limited J.F. & H. Dowds Limited
Creative and Digital Tech	None
Financial Business and Professional Services	Lynas Foods River Ridge Holdings Limited Nevco (NI) Limited Raalse Holdings Limited
Life and Health Sciences	North West Care And Support Limited
Retail	Ulster Stores Limited
Sustainable Energy	None
Tourism and Hospitality	W & R Holdings Limited Ground Espresso Bars Limited Roe Park Holdings Limited Fletcher's Bistro Ltd Dunluce Restaurants Limited
Transport and Logistics	None

Source: Fame database – UK and Ireland company database

3.2.2 Summary of Causeway Coast and Glens Analysis

In considering all of the above evidence it is clear there are a range of sectors which demonstrate competitiveness within the CCGBC area. Some are competitive because of their scale and concentration within the borough, others because of their growth and link with wider regional sectors and some because of niche specialism that offers potential to scale up. Table 3.7 below presents a long list of all sectors identified within both the top down and bottom up analysis, identifying which are shortlisted. In total 12 sector are identified, with 7 being shortlisted.

Table 3.7: Long list of sectors

Strategic focus	Included in long list	Rationale
Advanced Manufacturing, Materials and Engineering	✓	<ul style="list-style-type: none"> • Significant contributor to GVA and Employment (manufacturing) • Significant exporter • Productive sector • Quorum of sector and anchor firms • NI sector of priority
Aerospace		<ul style="list-style-type: none"> • No evidence of significant sector presence in the area
Agri-Food	✓	<ul style="list-style-type: none"> • Employee and GVA data often misses the scale of agriculture and agri food. Consultations across the borough have reiterated the importance of agriculture and the potential for agri-technology
Automotive		<ul style="list-style-type: none"> • No evidence of significant sector presence in the area
Construction	✓	<ul style="list-style-type: none"> • Significant contributor to GVA and Employment • Quorum of sector and anchor firms
Creative and Digital Tech		<ul style="list-style-type: none"> • No evidence of significant sector presence in the area
Financial, Business and Professional Services	✓	<ul style="list-style-type: none"> • NI sector of priority • Quorum of sector and anchor firms
Life and Health Sciences		<ul style="list-style-type: none"> • No evidence of significant sector presence in the area
Retail	✓	<ul style="list-style-type: none"> • Significant contributor to GVA and Employment • Quorum of sector and Anchor Firms
Sustainable Energy	✓	<ul style="list-style-type: none"> • No evidence of significant sector presence in the area but the Girona project offers an opportunity to craft a specialism in clean/green
Tourism and Hospitality	✓	<ul style="list-style-type: none"> • Growing sector and major NI priority • Quorum of sector and Anchor Firms
Transport and Logistics		<ul style="list-style-type: none"> • No evidence of significant sector presence in the area

Source: Grant Thornton analysis

In summary the seven sectors which are shortlisted for prioritisation are:

- Advanced Manufacturing, Materials and Engineering
- Construction
- Financial Business and Professional Services
- Retail
- Tourism and Hospitality
- Agri-food
- Sustainable energy

Conclusion on Prioritisation

In acknowledgment that CCGBC will need to prioritise and focus resources, the long-listed sectors has been categorised and prioritised. In prioritising, Grant Thornton have considered the following:

- Scale of local output, employment, exports and productivity
- Recent growth trends
- Alignment with wider regional priorities
- Likely success of local level policy intervention, based on previous evidence

The long list of sectors have been prioritised into the three following three segments:

- **Focus and Step Change:** These are “critical for growth” sectors which are considered likely to have the potential to support significant economic growth. These are sectors against which to prioritise resource and effort as a key economic development opportunity for CCGBC.
- **Sustain and Grow:** These are important core sectors for CCG’s economic development, with potential to enable [potentially significant] incremental growth. These are sectors which should be cultivated and nurtured to support future economic growth.
- **Monitor and Intervene:** These are sectors which, although they may be important to the current local economy, are not considered as one likely to generate material economic growth moving forward. These sectors should be monitored on an on-going basis for opportunities and trends which might create potential for future economic development, and interventions made accordingly.

Based on the above analysis the short list of sectors categorised as per table 3.8.

Table 3.8: Long list of sectors

Strategic Focus	Sector	Rational for this strategic priority
Focus and Step Change	Advanced Manufacturing, Material and Engineering	The manufacturing (including AMME) sector is a major employer, with a large concentration of employment in the CCGBC area, contributing significantly to the local economy and generating significant export revenue. It is a sector in transition, given many of the global and technological trends and as such requires a significant focus to retain employment and support future growth. This sector is also an NI wide priority, with an opportunity for CCGBC to leverage Invest NI and other's investment in the AMME sector. As such CCGBC should prioritise this sector focusing on retaining employment, opportunities for further employment growth and ensuring that barriers to this such as access to labour and infrastructure issues are minimised and removed.
Sustain and Grow	Professional Services	Whilst having a relatively small concentration of employment in the CCGBC area, this is a potential growth sector in the Borough and is a sector of strategic focus across Northern Ireland. As such CCGBC should focus on further supporting the growth of this sector within the Borough focusing on supporting the growth of indigenous firms.
	Tourism	There has been significant evidence of growth in recent years within the tourism sector, with global focused events such as 'The Open' being held within the council. With significant NI wide investment, a strategic location between Belfast and the Causeway coastal route, the presence of anchor firms and a developing product offer, this has the potential to be a driving growth sector for CCGBC. Having a strong tourism offer also underwrites the amenity of the Borough, providing value for residents and ratepayers and enhancing the liveability of the area.
	Agri	The strong agricultural presence across the borough plus the recent opening of DAERA's headquarters in the borough, alongside the potential for a Veterinary school at Ulster University suggests some building blocks for developing a cluster in the borough
	Sustainable development	The Covid-19 pandemic (where a reduction in commuting and industrial activity showed significant drops in Co2 emissions), and global moves towards net carbon neutrality by 2050 suggests the climate challenge is moving up the agenda. The Girona project in the borough is a novel and innovative energy project and the borough should seek to build expertise in this area.

Monitor and Intervene	Construction	Construction is traditionally a boom and bust sector, which is market led and aligned to investor and developer confidence and availability of capital. As such there are limited levers for CCGBC to support this sector, but as a major employer in the area, with significant contributions to GVA, CCGBC should track the sectors performance and where it can seek to intervene i.e. addressing access to labour.
	Retail	As with construction, retail is traditional a market led sector, with success aligned to consumer confidence. Again while there are limited levers for CCGBC to intervene, as a sector which employs a significant number of residents in the area, CCGBC should look to intervene where issues arise i.e. connectivity and access to labour and Post Covid-19 challenges.



4. Framing our borough's challenges

4. Framing our borough's challenges

4.1 Horizon Scanning – Key influencing factors

While Brexit arguably ranks as the most imminent/pressing issue weighing on future growth prospects, as well as that of the ever growing uncertainty around the lasting economic effects of the current COVID19 pandemic, there are a range of other thematic 'mega trends' that will bear increasing relevance to economic development practitioners and business operators. Analysis undertaken by Euromonitor outlined five key drivers of economic change over the next decade which connect to 20 megatrends. Most pressing within these trends from the Causeway Coast and Glens (CC&G) perspective are likely to be technology, environmental shifts and changing values (which encompasses a shift in retail trends and town centre usage).

Technology: plays a crucial role in consumer decision-making and the ability of business to meet the needs of today's consumer. It has created massive upheavals in consumer expectations, lowered the barriers of entry for fast-moving companies, and inspired new digital-first business models. Even more so than other drivers, such as population changes or shifts in economic power, the rapid uptake of new technologies continues to accelerate the rate of change, making it harder for companies today to stay relevant tomorrow. Continued technological advances in areas such as artificial intelligence and the Internet of Things will further redefine what it means to live, work, shop and play for consumers over the next decade and beyond.

Changing values: There has been a huge transformation in what is important to consumers. The rapid increase in connections has ushered in speed, convenience and instant access across life. Connected consumers can summon a taxi, book a flight, browse products, order food, listen to music, play a game, watch a film or chat with others using internet connectivity. This is developing greater self-awareness and is helping consumers to make more informed decisions. This will have a significant impact on the CC&G areas attractiveness as a place to live and a place where residents feel fully connected to all the choices and opportunities of the larger regions such as Belfast.

Environmental challenges: Climate change, competition for resources, pollution and waste are creating environmental pressures. The effects of climate change are becoming more visible and consumers are shifting their views and tastes rapidly to reflect appetites to halt environmental crises. While environmental pressures pose substantial risks and challenges to businesses they also offer new market opportunities. The CC&G area has its own particular challenges, with a diverse range of habitat types (39 out of 51 Priority Habitats in NI occurring in the area). The challenges posed here can also be harnessed to position the CC&G council at the heart of carbon neutral ambitions within NI.

In addition to the drivers and megatrends outlined above, there are a series of thematic issues already underway and impacting on economic trends and performance. These are considered through a PESTEL assessment. A PESTEL analysis is an invaluable business tool that analyses six different groups of external factors, all of which can affect a business, industry, or in this case, the Causeway Coast and Glens Borough Council.

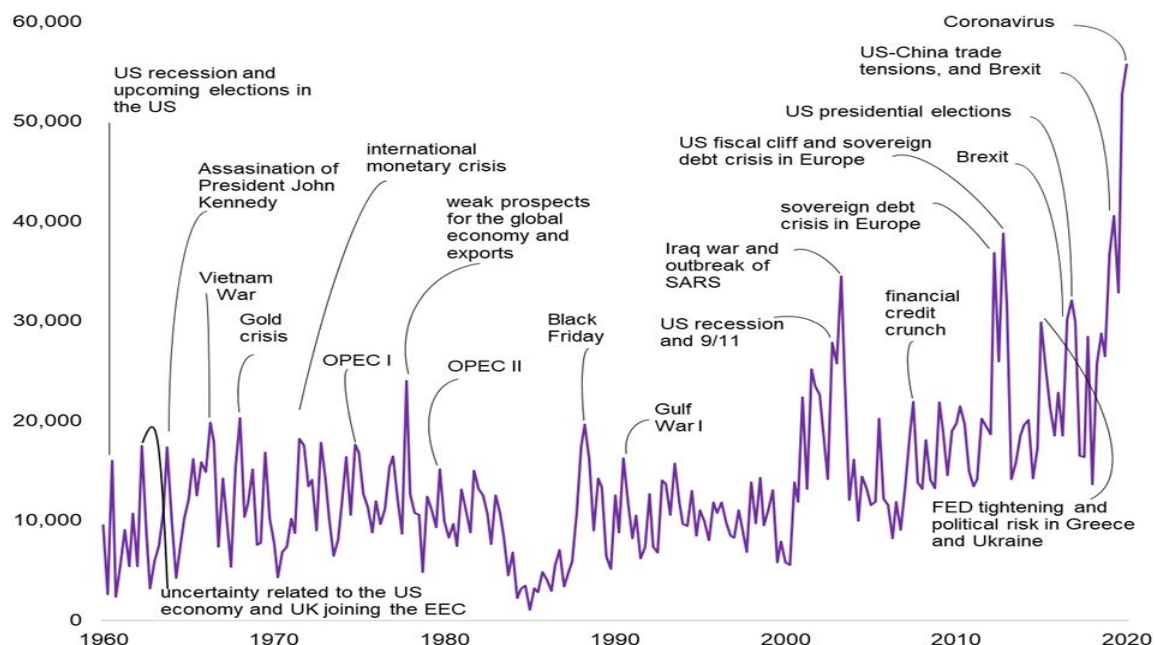


4.2 Political

4.2.1 Global political uncertainty is a business concern

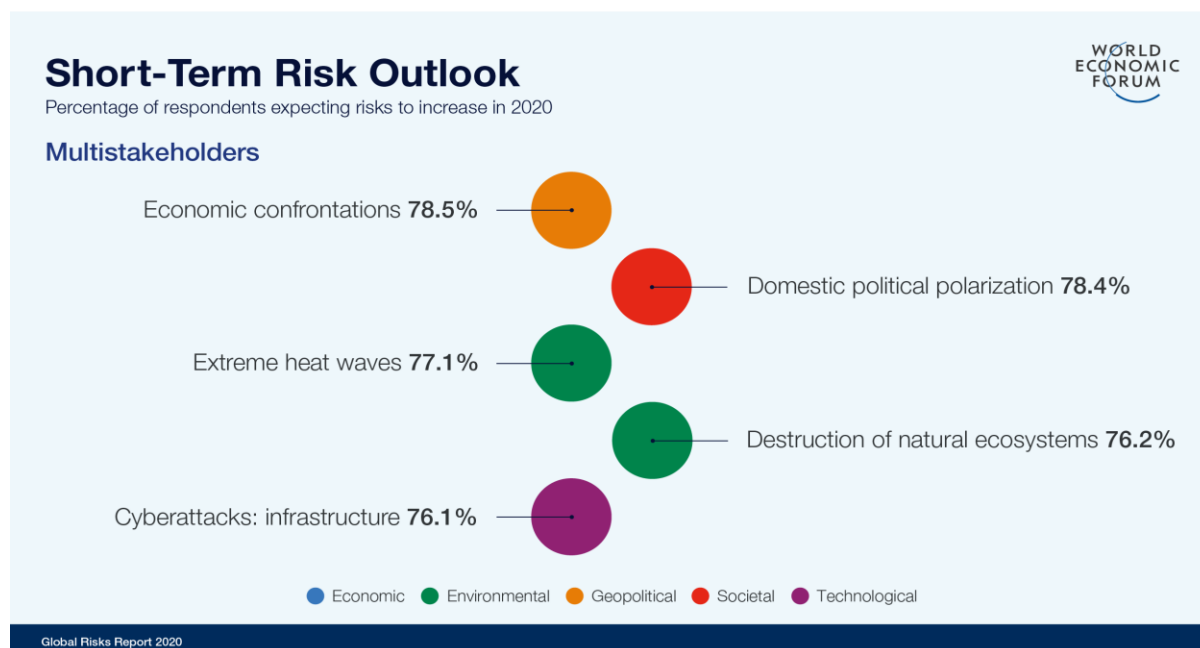
It is unsurprising that the measure of global uncertainty is posting that we are living through the most uncertain time in a generation. The World Uncertainty Index shows that prior to the current COVID19 pandemic, the US-China trade tensions and BREXIT where the highest level of global concern, surpassing that of the Iraq war and the sovereign debt crisis in Europe.

Figure 4.1 World Uncertainty Index



Source: Ahir, H, N Bloom and D Furceri (2018), "World Uncertainty Index", Stanford mimeo

Further, economic and political polarization will rise this year, as collaboration between world leaders, businesses and policy-makers is needed more than ever to stop severe threats to our climate, environment, public health and technology systems. This points to a clear need for a multi-stakeholder approach to mitigating risk at a time when the world cannot wait for the fog of geopolitical disorder to lift. These are the findings of the World Economic Forum's *Global Risks Report 2020*, the findings from which are presented below.



4.2.2 Post Brexit UK

Unknown terms of trade

Following the completion of the ratification process in the EU and the UK, the UK left the EU on Friday 31 January 2020. Brexit presents unprecedented challenges for Northern Ireland given our economic, political and historical relationship with the EU and sharing a land border with the Republic of Ireland.

Although no longer a member of the EU, the Withdrawal Agreement provides for a transition period up to 31 December 2020. During this transition, EU rules and regulations will continue to apply to the UK and the UK will remain part of the EU's Single Market and Customs Union. There will be no immediate changes for citizens and businesses in their day-to-day dealings.

At the end of the transition period, the UK will no longer apply all EU rules and regulations, and some of the everyday running will change. The specific details of this change will depend on the outcome of future relationship negotiations between the EU and the UK which will take place throughout 2020.

4.3 Economic

4.3.1 Coronavirus could cause fundamental economic change

The outbreak of the Coronavirus, and the social isolation and social distancing measures that have been enacted, has resulted in a sharp contraction across many sectors of the economy, particularly tourism and construction. These sectors, and indeed the whole economy, were continuing to post labour market growth before the pandemic. There is no way to accurately predict the impact on the economy of the virus. Behaviourally, the hope is that economic activity bounces back and that today's problems do not become permanent damage – however with the potential for further lockdowns, albeit, localized, and a general malaise about the economy, this is not a given.

The economic recovery since the downturn period of 2008-12, has seen significant additional employment created across the region, to the extent that questions around tightening labour market capacity have been raised. However, the shadow of the recession, and now the Coronavirus, reminds policy makers of the fragility of economic performance and the need for resilience. To that end, the draft Programme for Government seeks to put the economy in a better place to withstand shocks focusses on indicators such as:

- Improving the skill profile of the population
- Reducing economic inactivity
- Enhancing the competitiveness standings of the economy
- Reduction in underemployment
- Improved regional balance of economic prosperity

Covid19 Supply Chain Disruption

Another consequence of Covid-19 is the disruption to supply chains that occurred as economies moved in and out of lockdown at different paces. Therefore, the topic of shortening supply chains, after decades of globalization, has gained prominence in economic and policy discourse. Localised supply chains can be more responsive to fulfilling short orders and can build more resilience into the production cycle. Technology is also playing a role in increasing the viability of manufacturing here rather than in cheaper labour cost locations. Technologies such as machine learning and demand analytics can favour shorter, smarter and more demand-driven supply chains. In some cases, 3D printing can provide a low volume part at a competitive cost and in a fraction of the time of a traditional low-cost off-shore supplier.

4.3.2 Industrial Revolution 4.0 is changing the world of work

Manufacturing has entered a fast-changing phase of development globally. Termed 'Industry 4.0', manufacturing processes are expected to embrace new advances in areas such as automation, 3D printing Big Data and the 'Internet of Things' to reshape product design, production and create new business models. Industry 4.0 will accelerate over the next 2-3 years transforming manufacturing processes. Industry 4.0 will make supply chains and production processes more interconnected, efficient and flexible, allowing mass-customisation and virtual production.

4.3.3 High Streets Reimagined

Footfall decline across global high streets is accelerated as internet shopping changes how consumers shop. This has led to 'death of the high street' worries to emerge. To counter that doomsday scenario, a 'reimagining the high street' theme has emerged across initiatives such as Main Street America and the Institute for Place Management. These initiatives aim to reinvent, reposition, restructure and rebrand the high street, across 25 priority areas. The emergence of a quality cuisine offering and emerging tourism economy in CC&G points towards a platform on which to build a reimagined high street. However, food and visitors should not be the only targets – there is a need for multi-functional centres catering for a wide range of societal needs.



4.4 Social

4.4.1 Housing affordability is a key societal challenge

Not building fast enough

NI is building more houses but not at a pace that meets demand. As of the 31st March 2019 there were 37,859 applicants on the social housing waiting list, of which 26,387 were deemed to be in 'housing stress'. The total housing stock for 2019 was 798,971, increasing at a higher rate than that of population (1% from 2018). However, when analysing the breakdown of the number of new dwelling completions, only 937 of the 7,809 were for social housing, highlighting a significant imbalance in the NI housing market.

Another factor to consider is the total stock per 1,000 of the population is considerably low (420 homes), signaling that more households are competing for fewer available homes, with more young people living at home, and more adults in group housing. The average household size, of 2.5 people per home, higher than that of the European average of 2.3 people per home, further illustrates the excess level of demand within the region.

Causeway Coast and Glens housing affordability

During the period 2013-16 house prices within the borough appreciated by over 6% each year on average, and reflected a return of confidence in the housing market following a long period of price contraction as a resultant of the financial crisis of 2007-08. To date the median house price within CC&G is approximately £130,000, the 4th most expensive council area across NI.

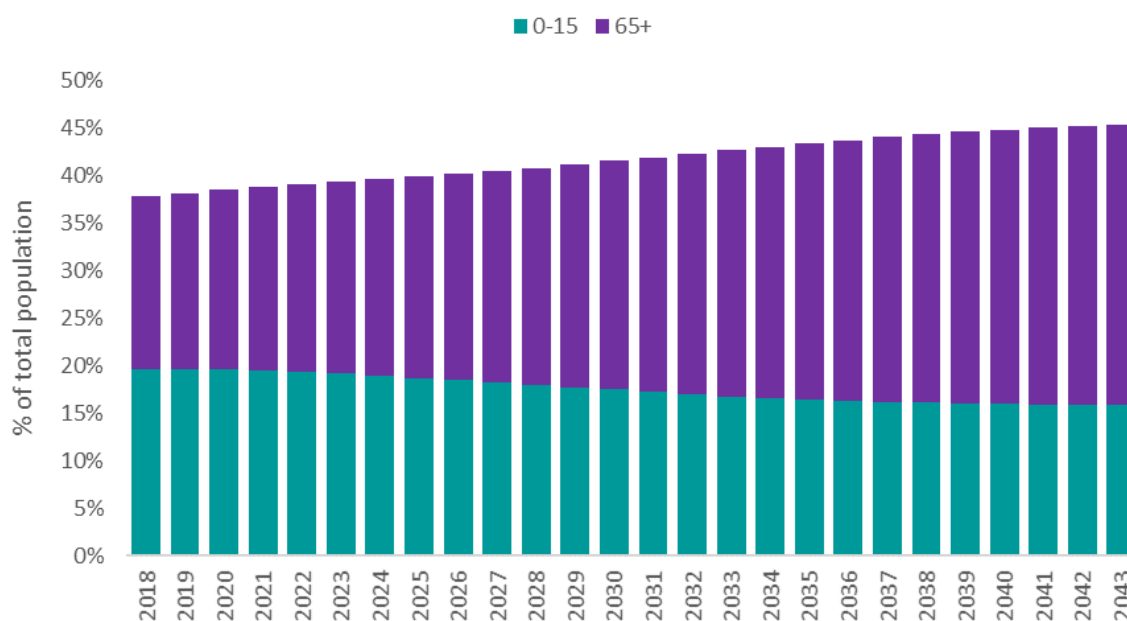
Research undertaken by PropertyPal on the CC&G area highlights, that when taking into account the typical mortgage deposit of 10% (approximately £13,000 for a median priced home in the borough), and the current lending rules which typically permit mortgages of around 3.5-4.0x an applicant's income, a perspective home owner would require a household income of approximately £29,300, which is 22% above the average house hold income (£23,981) within the borough. This therefore, arises an issue regarding affordability within the private housing sector and may add increasing pressures in regards to social housing within the borough.

4.4.2 Northern Ireland is getting older

Increasing care needs

NI at present is a relatively “young” country, but the number of older people will soar in the years ahead. The NISRA 2018 based population projections, forecast that by 2043 the population aged 65 or above would more than double (56.2% increase). The statistics found that by 2043 just under a half of a million inhabitants in the region will be aged over 65 years. Meaning that 24% of the population will be over 65 compared to 16% now, with official projections suggesting that the favourable ratios between younger and older persons experienced over recent years will be reversed in the decades ahead. In 2018 there were just under 400,000 young people in the 0-15 age category, compared with just over 300,000 aged over 65. However, this picture will be turned on its head by 2043 under all scenarios envisaged. Causeway Coast and Glens, dependency ratio will also soar in the years ahead, with 54 inhabitants aged 65 or above for every 100 of the working age population, accounting for 29% of the borough's overall population in 2043.

Dependency Ratio (% of population aged 15 or below and 65+), CC&G, 2018-43



Source: NISRA – Population Projections

This shift will have considerable implications both in terms of public policy, for the health service and for the Government's finances in the years ahead, with forecast from the UUEPC indicating a demand for the health sector, with the sector predicted to grow on average by 3.3% per annum over the 2017-30 period. This will lead to pressures on services, such as pharmacies, acute hospitals and occupational therapists.

4.5 Technological

4.5.1 The rise of the Robots

Artificial Intelligence (AI) is changing the world of work rapidly. This could mean that jobs will be lost in certain sectors, but also means that new jobs could be created. The occupations most at risk from automation are widely regarded to be in Administrative or customer service type roles: In fact, a report by 'Futurism' regards these five sectors as most at risk:

Sales: identifying sales leads relies on accurately profiling behaviours and identifying potential customers. Big data and online profiles present that opportunity and it is expected that sales lead generation will transform further

Customer Service/Retail: from self-service tills in supermarkets to Amazon's checkout free grocery stores to 'chatbots', customer service is undergoing an Automation transformation. It is predicted by Wiredelta that by 2020, customers will be able to undertake 85% of retail transactions without human interaction.

Transportation: Delivery drivers, long haul drivers, and public transport drivers are all likely to be affected by advances in AI. For example, Helsinki has introduced self-driving buses, with other cities set to follow suit. Personal self-driving vehicles are also in development with major car manufacturers suggesting 2021 or sooner as launch dates for self-driving cars.

Logistics: Beyond self-driving vehicles, warehousing and basic logistics are prime areas for AI. Logistics problems, like dynamic management of route systems in real-time to improve delivery speeds, and efficient space allocation in shipping containers and trucks, are both ideal for AI applications.

Data Entry type roles: The accountancy profession is increasingly automated, with cloud based processes and automation software which can streamline the accounts process. Unsurprisingly, jobs involving simple, repetitive tasks are often the first to be lost to automation technology. With vast quantities of data now being produced, businesses can get faster, more accurate results by using software to instantly sort, store and analyse data.

While the risks from automation are increasingly well understood, there will also be jobs created from the technological advances made. For example, as an ageing population demands greater care, jobs in health and caring occupations are expected to increase. Occupations where demand will likely increase can be classified in broad terms as those that require dexterity, softer "people skills", creativity, digital knowhow, persuasion, creativity, strategic thought and leadership. This will have implications for future skills demands and will require an agility from policy makers to support the delivery of a ready workforce¹.

4.5.2 Smart and Green

'Innovate to zero' is a 'mega vision' of a conceptualised world with zero emissions, zero accidents, zero data breaches, zero time from design to build etc. which has been developed by Frost and Sullivan and based on an initial TED Talk by Bill Gates. It is used as a vision to encapsulate a requirement for significant innovation across many spheres of technology and business. In practice, 'zero' has begun appearing in some areas - zero emission cars (e.g. Nissan, Tesla and others) and zero carbon factories (e.g. Renault's plant in Tangier).

While 'innovate to zero' might be described by its authors as a 'mega vision', much of the 'smart' and green agenda feeds into that vision in an increasingly common and practical sense. Indeed, one mega trend that has been posited by Frost and Sullivan is how the 'Green' agenda has been replaced by 'Smart'. Simply put, this is the use of connectedness and big data analytics to deliver more efficient (and ultimately 'greener' outcomes).

¹ <https://futurism.com/new-chart-proves-automation-serious-threat/>

4.6 Environmental

4.6.1 Climate emergency moves Centre stage

Net Zero 2050

Evidence for warming of our climate system is beyond dispute. Observations show that global average temperatures have now increased by more than 1°C since pre-industrial times. The atmosphere and oceans have warmed, the amount of snow and ice has reduced, and sea levels have risen as the concentrations of greenhouse gases have increased. The projections of future global and regional climate change indicate that continued emissions of greenhouse gases will cause further warming and changes to our climate. These changes will cause extensive direct and indirect harm to Ireland and its people. Ireland has joined other EU members in signalling an ambition to achieve net carbon neutrality by 2050. The plan, laid out in 'Climate Action Plan 2019' sets demanding targets in almost all relevant sectors, with 180 actions set down, mostly targeted to 2030.

Northern Ireland last published an energy strategy in 2009. A new one is in development.

Circular economy trends

One of the most ambitious environmental policy initiatives of recent times is the EU's Circular Economy Strategy, one of the main blocks of the European Green Deal. In April 2018 EU Council Ministers signed-off on an ambitious new target of recycling 55% of all municipal waste in the EU by 2025. This target will rise to 60% by 2030 and 65% by 2035. The targets for recycling paper and cardboard are even more ambitious, at 75% by 2025 and 80% by 2030. The new Action Plan announces initiatives along the entire life cycle of products, targeting for example their design, promoting circular economy processes, fostering sustainable consumption, and aiming to ensure that the resources used are kept in the EU economy for as long as possible.

It introduces legislative and non-legislative measures targeting areas where action at the EU level brings real added value. The new Circular Economy Action presents measures to: Make sustainable products the norm in the EU; Empower consumers and public buyers; Focus on the sectors that use most resources and where the potential for circularity is high such as: electronics and ICT; batteries and vehicles; packaging; plastics; textiles; construction and buildings; food; water and nutrients;

Ensure less waste; Make circularity work for people, regions and cities, Lead global efforts on circular economy.

4.6.2 Growth oriented legal frameworks

Freedom to do business

As a devolved region, with a relatively stable parliamentary democracy, NI follows the laws regarding trade and business regulations, in which are implemented by the UK. Regulation is about freedom to do business. The UK is recognised as one of the most attractive locations for international companies to access the EU internal market. The 2020 World Bank "Doing Business" report ranks UK in the top 10 of the 190 economies surveyed. 'Doing Business' measures the processes for business incorporation, getting a building permit, obtaining an electricity connection, transferring property, getting access to credit, protecting minority investors, paying taxes, engaging in international trade, enforcing contracts, and resolving insolvency. Doing Business also collects and publishes data on regulation of employment as well as contracting with the government. The employing workers indicator set measures regulation in the areas of hiring, working hours, and redundancy. The contracting with the government indicators capture the time and procedures involved in a standardized public procurement for road resurfacing. These two indicator sets do not constitute part of the ease of doing business ranking.

Strengthening Local Authority Planning

In 2015, NI's new reform of local government resulted in the creation of 11 new councils, to which these councils were given the responsibility of leading the community planning process for their district.



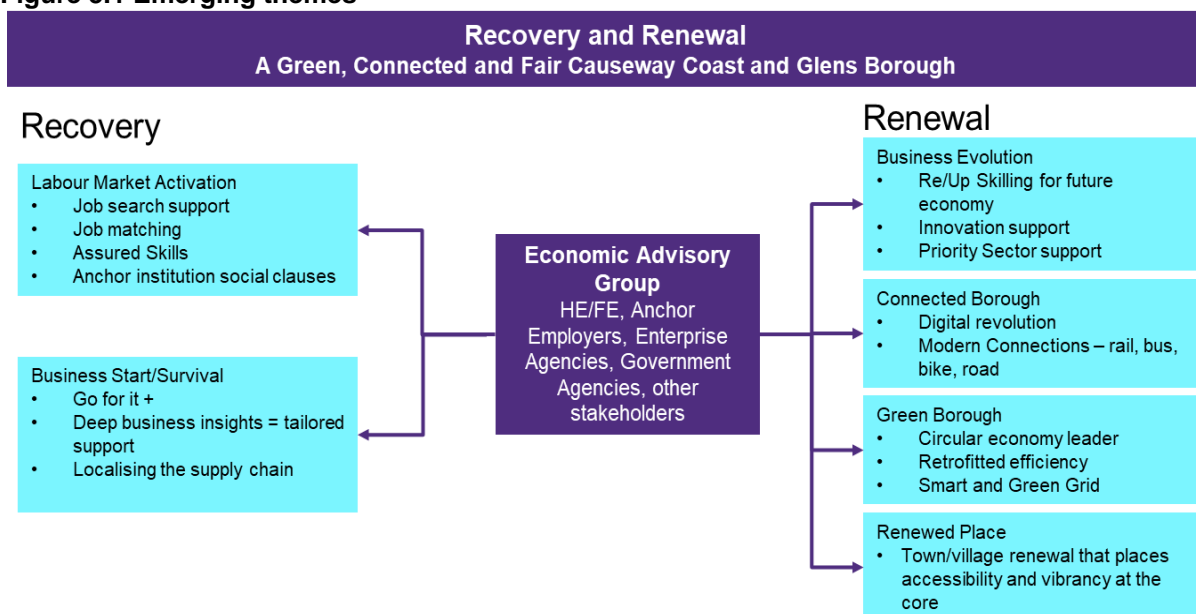
5. Recovery and Renewal – an economic plan for Causeway Coast and Glens

5. Recovery and Renewal – an economic plan for Causeway Coast and Glens

5.1 Areas of Focus

Building on the series of consultations and body of supporting work undertaken in support of the development of this strategy, including comprehensive data analysis and an assessment of policy initiatives elsewhere, the following areas of focus are proposed. The six areas of focus for recovery and renewal are presented in figure 5.1 below, with a commentary on their rationale for inclusion. Each theme for action aims to deliver on an ambition to deliver a green, connected and fair economy in Causeway Coast and Glens.

Figure 5.1 Emerging themes



Source: Grant Thornton

5.2 Recovery

Labour market activation

The Causeway Coast and Glens borough is facing challenging times ahead. The impact of the Covid-19 pandemic and the ongoing uncertainty around Brexit raises the risk of significant levels of unemployment. Supporting people through uncertain economic times and puts the borough into a period of re-invention, where recovery and growth is vital for a prosperous future. The UK government has been pro-active in implementing job retention schemes across the UK. Council has a key role to play in localising these initiatives through training support, job search assistance and job matching services.

Further, beyond a Covid-19 context, the availability of appropriately skilled people is of fundamental importance to economic growth. A large body of research notes the importance of skills to economic success and there is a noticeable increase in reports of skill shortages and gaps across the UK and Northern Ireland from employer bodies such as the CBI and Chamber of Commerce. The Northern Ireland Skills Barometer from Ulster University, which estimates the extent of future demand across a range of skills levels and a range of sectors, supports findings that the demand for skills will outstrip projected supply over the next decade. There is a marginal undersupply of skills at graduate levels and a more acute shortage at mid-tier skills levels. Considering Skills Barometer research at a local level suggests similar issues around employability and skills.

Table 5.1 – Labour Market activation

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Labour Market Activation	Job search support	A significant proportion of the Borough's employees are on Furlough and there is a heightened risk of significant levels of unemployment	Sudden and significant numbers of people becoming unemployed can lead to economic depression, erode the skills base of the labour force and have significant mental health and wider health impacts if short term unemployment becomes ingrained/long term.	Council can act as a key enabler in providing labour market activation programmes (training, interview support) and community employment programmes as well as providing a rapid response 'one front door' for job matching across the borough.
	Job matching	Redundancy announcements across NI are increasing and projected to increase further. Job matching		
	Assured skills	The Skills Barometer from Ulster University shows a mismatch between supply of skills and demand. Consultations bear skills challenges out	For companies that wish to grow, the inability to recruit staff is a key barrier, which can lead to delayed growth or companies locating elsewhere.	An assured skills programme (only inward investors/Invest NI clients are currently eligible) would alleviate skills shortages
	Anchor institution social clauses	Anchor institutions in the borough can have a significant influence on labour demand either directly or through annual procurement expenditure.	Anchor institutions can be utilised to support the creating job opportunities for residents in the Borough	Devise a procurement strategy that promotes local delivery and promotes social clauses that provide opportunity for unemployed residents.

Business Start and Survival

New business creation is a key part of the economy. Northern Ireland has traditionally struggled to keep pace with the entrepreneurial pace of other jurisdictions. Coupled with this, there has been a sharp decline in business creation during the Covid-19 lockdown. The various supports available from HM-Treasury to protect employment during the crises omitted new business starts. The entrepreneurship picture is now more complicated – on the one hand, people might see the lack of support from HM-Treasury as a disincentive to start a business and on the other hand people who lose their jobs as a result of the crisis might feel like self-employment is the only option. It is also apparent from recent FDI statistics and projections of future FDI opportunities that the possibility of a large inward investor coming to the borough and creating significant employment is low. As a result, the need to promote and support entrepreneurship is heightened.

Causeway Coast and Glens is one of the lowest performing areas in Northern Ireland in terms of entrepreneurial activity and business start-up. Creating a culture of entrepreneurship and generating more indigenous businesses has the potential to generate local wealth and provide future employment opportunities within the borough. When considering any gaps in provision, there was a broad consensus from consultees that Council needs to engage more and provide a service that better links businesses to support.

For existing businesses, various forms of support are available. Indeed, providing business support in Northern Ireland is a crowded space, as evidenced by an audit of enterprise support provision conducted by McClure Watters in 2008 (the most recent comprehensive assessment of business support). This audit estimated that 200 organisations are providing approximately 2,000 business support programmes. The needs of businesses and awareness of supports have been assessed through a recent comprehensive study undertaken by Ulster University on behalf of the Federation of Small Businesses Northern Ireland. Across 200 businesses, the study queried the barriers and obstacles impacting on growth and what role government could play in addressing these barriers. Of particular relevance is that a lack of suitable business support was noted by 27% of respondents as being a significant barrier to their business success. During consultations undertaken over the course of developing this strategy, this issue was raised several times. Several consultees noted that there is far too much support but that small business does not know where to look for it. Indeed, the FSB/Ulster University survey found that one in ten survey respondents did not know where to seek support. Perhaps, as one consultee noted this is due to 'business owners are focused on the task of surviving/growing their business and do not have the time to hunt out 10 different providers of the same course to decide which one works for them.

Table 5.2 – Business Start/Survival

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Business Start/Survival	Go For it +	Causeway Coast and Glens have a relatively low level of entrepreneurship	Fewer new business starts hinders economic growth and diversity	Enhanced 'exploring enterprise' programmes from school age and up and ongoing 'Go for it' business start support. Additional Exploring enterprise support for newly unemployed Fast track/intensive support for high growth potential startups.
		A considerable majority of Northern Ireland companies are not serviced, thus not accessing company support levels	A clear cohort of non-serviced companies can be identified without overlap and build engagement with Invest Northern Ireland	Understand the pool of non-serviced companies and build engagement plan to provide relevant support programmes
	Deep business insights=Tailored Support	Business support is crowded with limited effectiveness and low awareness	The solution is not merely 'more' support but value added, high quality support that business know about	Map current provision, listen to business and create a concierge and signposting service
		Interactions are transactional rather than being focused on relationship building	Does not build ambition or promote correct behaviours	Longer term engagement with smaller pool of companies where CC&G can show leadership, mentorship, accredited courses
	Localising the supply chain	There is a growing movement towards local wealth building and using the anchor institutions of the economic benefit is and local assets to maintain as much economic activity within the local area as possible. Working towards local wealth building principles (as championed by Preston) can greatly enhance local growth.	Procurement contracts are awarded to large multinationals and some of the economic benefit is extracted from the local area.	Pursue a local wealth building strategy.

5.3 Renewal

The economic shock from the Covid-19 pandemic, and the different ways of working that emerged during lockdown, show that our economy needs to become more resilient and evolve into new opportunities. It is correct that our economic development efforts focus on recovery in the first instance. From recovery, we must move to renewal. While the £72m growth deal undoubtedly offers an exciting opportunity to introduce new capital expenditure that can make a significant positive impact on our economy, renewal is not just about new buildings and infrastructure. Our business community needs to evolve and renew to remain competitive.

Business Evolution

Aligned to Business Start/survival in the recovery phase, business evolution recognises that there are long standing challenges and new opportunities that our sectors (both established and emerging) should be supported to grasp. For example, key business challenges remain low levels of relative productivity and low levels of innovation, both of which lag behind our nearest neighbours. This productivity gap can in part be explained by the high levels of employment concentrated within lower value-added sectors as well as the heavy reliance on its public sector which accounts for 29.7% of total employment but there is also an issue with uptake of innovation and implementing automation or improved management techniques. Supporting our businesses become more productive, innovative or more resilient to shocks is a key aim.

Business evolution also encapsulates grasping new opportunities. For example, in tourism, the North Coast is globally renowned and our tourism sector drives significant employment. However, there is always more we can do. For example, cycling tourism (both leisure cycling and mountain biking) is big business in other places. In Scotland, the economic value of cycling tourism, including mountain biking in excess of £500m per annum. The borough is blessed with natural assets that could be harnessed to maximize a significant impact from evolving our tourism offer.

It was evident from consultations and from assess where our priority sectors lie that our business base can evolve to create some nice areas of specialism such as artisanal craft and food and in agri-tech/animal-health. Councils can't create sectors but can play a key enabling role in supporting them where needed.

Table 5.3 – Business evolution

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Business Evolution	Re/Upskilling for future economy	The economic landscape is changing – industry 4.0, trends towards home working and online retail are all influencing the skills our economy needs.	Without adapting to a changing economic context management leadership skills, adoption of new techniques and process automation, our businesses could get left behind.	Future economy training/business support should be available to support our business base adapt.
	Innovation support			Product and process innovation support programmes are required
	Priority sector support	'Picking winners' can risk missing new emerging sectors but our borough clearly has a range of sectoral strengths and the ability to gain specialisation in some areas such as artisanal food and craft and green/clean energy	Developing specialisms builds profile, which helps attract more businesses to start in the area.	Develop a priority sector plan and tailor support according to need

Connected Borough

The success of any modern economy is dependent on world-class road, cycling, walking, water, energy, communication and public transport infrastructure and an attractive living environment. The importance of infrastructure investment as a key driver of economic growth is documented across key policy documents such as Regional Development Strategy for Northern Ireland. A well-developed infrastructure can enhance the overall competitiveness of Causeway Coast and Glens, enhance employment opportunities and enhance the quality of life for residents. Although the borough benefits from some excellent infrastructure (e.g. M2 and A26 connection to Belfast) there remains significant gaps in provision. As our lives and business activities become ever more digital dependent, it is imperative that the borough has exceptional broadband infrastructure.

Table 5.4 – Connected Borough

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Connected Borough	Digital revolution	Business and residential demands for fast broadband is relentless.	Without exceptional business and domestic broadband provision, the borough could lose out to other locations for investment and residents.	Ensure the broadband infrastructure is with the best available for all areas of the borough.
	Modern connections	There are key infrastructure weaknesses across the borough in roads, energy, leisure (cycle ways and river use) public transport etc.	Better infrastructure will support economic growth	Deliver a capital expenditure programme that addresses key weaknesses.

Green Borough

We will play our part in the UK becoming net carbon neutral by 2050 (or sooner) and develop a regional energy strategy for the borough. This requires us to take bold steps to rethink our economy and provides opportunities to embrace the circular economy, support energy efficiency in business and residential settings and develop a smart and green grid. Achieving net carbon neutrality is not going to be easy. In a survey of businesses undertaken in the British Chamber 'Net Zero' survey in March 2020, the availability or cost of low carbon alternatives was the main barrier to businesses reducing their carbon footprint. Council can play its part in raising awareness of how to reduce carbon and can retrofit our buildings to achieve maximum efficiency and use these as demonstrators of best practice.

Table 5.5 – Green Borough

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Green Borough	Circular Economy Leader	We continue to land fill too much of our waste, significant amounts of which have to be exported as considerable cost	Poor waste management is inefficient and environmentally unsound. Maximising the circular economy mitigates this.	Support the growth of a circular economy across the borough.
	Retrofitted efficiency	Our buildings are some of the most inefficient in Europe	Addressing the environmental inefficiency of existing buildings is a significant step towards net carbon neutrality and creates employment opportunity.	Retrofit inefficient buildings across the borough.
	Smart and green grid	The smart control of grids with capacity to handle and store renewable sources of energy is highly efficient	Smart and green grids are a key element of a move towards better climate change management	Develop a regional climate strategy to capture a comprehensive approach to delivering net carbon neutrality.

Renewed Place

Footfall is declining across global high streets as internet shopping changes how consumers shop. This has led to ‘death of the high street’ worries to emerge. To counter that scenario, a ‘reimagining the high street’ theme has emerged across initiatives such as Main Street America and the Institute for Place Management. These initiatives aim to **reinvent, reposition, restructure and rebrand** the high street.

This is particularly pertinent for Causeway Coast and Glens, where our towns and villages are crucial to our economic wellbeing, especially tourism. Further, the move to more working from home offers our borough a chance to offer employees in major employers the opportunity to live in the borough but work anywhere. Being able to provide a fantastic quality of life and ensuring that the borough is an area in which people want to work, live and visit becomes even more important in this context.

Table 5.6 – Renewed Place

Theme	Sub theme	Issue	Implication	Causeway Coast and Glens Call to Action
Renewed Place	Town village renewal that places vibrancy at the core	Our towns and villages have to reinvent themselves to ensure they remain vibrant, accessible and safe	Losing the vibrancy of our towns and villages will have deeply damaging long-term economic and social costs	Develop a town and village renewal strategy to ensure the continued viability of towns and villages across the borough.



6 Answering our call to action

6. Answering our call to action

6.1 Meeting the growth challenges

The Economic Development ambition for Causeway Coast and Glens is that we build a green, connected and fairer economy in the Borough. We will link this ambition to contributing to achieving the outcomes in our Community Plan, namely:

- A thriving economy
- A healthy safe community
- A sustainable accessible environment

Council cannot deliver economic development alone. Causeway Coast and Glens Council is one of many stakeholders who have a role to play in delivering on the economic ambition for our borough. Only where council can add value will we be involved. Our partners across NI government, education, the private, voluntary and social economy all have a partnership role in driving the Causeway Coast and Glens Council area forward. The activities and initiatives the Council will undertake have been guided by detailed analysis and engagement.

Several projects will overlap between the current and new economic development strategy due to funding commitments, as well as their continued relevance to the themes. These include:

- Business Start, Alchemy, Taste Causeway, Earn to Learn
- Council's work with Full Fibre Northern Ireland, the Girona Project, and the Workforce Development Group
- CC&G Gift Card, data gathering in town centres across the Borough, continued engagement with Chambers of Trade and Town Teams
- Continuing work with updating and realising town centre masterplans, with the next regeneration work focusing on Ballymoney (in conjunction and with the availability of funding from Department for Communities)

6.2 Proposed Actions

Based on the themes outlined above and drawing on consultations and best practice from elsewhere, our activities will include the following suggested actions.

Category	Sub Category	Proposed Activity
Labour Market Activation	Job search support and job matching	<ol style="list-style-type: none"> 1. Develop a programme of support (CV support, retraining etc.) to rapidly react to any shock closures of large scale employers. 2. Develop a community employment programme to help people who are unemployed to get back to work by offering part-time and temporary placements in jobs based within local communities. 3. Deliver a job matching service to help people, who are temporarily not working, find jobs in key roles where support is needed.
	Assured Skills	<ol style="list-style-type: none"> 1. Facilitate a skills forum to ensure the needs of business are understood. 2. Develop an assured skills programme for Non-Invest NI clients.
	Anchor institution social clauses	<ol style="list-style-type: none"> 1. Work with local anchor institutions to enhance adoption of social clauses in procurement/capital projects.
Business Start and Survival	Go For it + Deep business insights=tailored support	<ol style="list-style-type: none"> 1. Continue to support business creation through 'Go For It'. 2. Support a 'Know our entrepreneur' Client Relationship Service that builds a comprehensive picture of what support our entrepreneurs actually need 3. Consider (subject to need) supporting town/village based business incubators 4. Deliver a suite of tailored support (based on action 2) around: <ul style="list-style-type: none"> • Property • Sales Growth • Sustainability • Energy • Skills • Internationalisation and export • Suppliers/supply chain • Innovation • Finance • Sector specific support to our Rural businesses and our 'sectors of advantage'
	Localising the supply chain	<ol style="list-style-type: none"> 1. Work with local businesses to build their public procurement capability. 2. Work with local anchors around procurement opportunities. 3. Develop a portal for local procurement opportunities

Business Evolution	Re/upskilling for the future economy Innovation support	<ol style="list-style-type: none"> 1. Develop a model/interface between employers and training providers. 2. Deliver management and leadership training for CEO's 3. Work with University and FE to deliver 'future economy' training and knowledge transfer partnerships 4. Develop a 'robotic process automation' demonstrator to highlight gains from implementing automation into everyday working practices
	Priority sector support	<ol style="list-style-type: none"> 1. Deliver sector specific supports based on priority sectors (eg artisan food programme, social enterprise, circular economy)
Connected Borough	Digital revolution	<ol style="list-style-type: none"> 1. Invest in achieving world class broadband for business and residents across the borough
	Modern connections	<ol style="list-style-type: none"> 1. Deliver a capital expenditure programme that improves key infrastructure across the borough
Green Borough	Circular economy leader	<ol style="list-style-type: none"> 1. Develop regional energy strategy 2. Develop a circular economy plan
	Retrofitted efficiency	<ol style="list-style-type: none"> 1. Support the renovation, retrofit and refurbishment of existing building and homes, to upgrade the energy performance throughout the borough.
	Smart and green grid	<ol style="list-style-type: none"> 1. Develop and implement an electrical grid which includes a variety of operation and energy measures. 2. Promote the use of smart meters. 3. Pursue development and uptake and storage of renewable energy sources
Renewed Place	Town/Village renewal that places accessibility and vibrancy at the core	<ol style="list-style-type: none"> 1. Develop and implement a programme of town/village redevelopment. 2. Promote Business Improvement Districts in core retail and industrial locations. 3. Support town and village centres evolve through promoting town centre living above the shops initiatives and facilitating business/community hubs in town and village centres



7. Resourcing our strategy

7. Resourcing our strategy

7.1 Introduction

Economic development in Causeway Coast and Glens Council is delivered through the Prosperity & Place Directorate, specifically across four small teams:

- Business Development – manager and four project officers
- Regeneration – Head of Service and one project officer
- Strategic Projects – manager and one project officer (shared with Regeneration)
- Town and Village Management – manager and two project officers

7.2 A Partnership Approach

The Economic Advisory Group which comprises representatives from organisations across the Borough is a valuable channel for building an economic development partnership. The Economic Advisory Group will continue to play an important role during the lifecycle of this economic development strategy.

Council's Leisure & Development Committee is the key stakeholder in terms of legislative and directional leadership. The Committee will be a guiding light in overseeing the ongoing implementation of the strategy over the next ten years.

With the development of Town Teams and continued partnership with Enterprise Agencies, a ground up approach will be important in continuing to monitor and react to changing local circumstances.

7.3 Council resourcing

This economic strategy, and the city and growth deal projects that will be implemented over the coming years will require careful consideration of the appropriate levels of resourcing. While no immediate changes to resourcing are proposed, over the medium term, the following roles are proposed:

- Digital Officer – with specific technical skills – infrastructure, communications, connectivity – to support the work of the new Digital Strategy, and complete the rollout of the Full Fibre NI project, as well as ensuring uptake of broadband schemes and Project Stratum
- Employability Officer – to develop the activities of the Workforce Development Group, and help to develop new employability projects with local providers across the Borough
- Regeneration Officer – to work with the Head of Service and existing project officer to take forward consultation and design for projected interventions, and implement monitoring and evaluation at end-of-scheme

Next steps in terms of resourcing will include the development of the business plan for years 1-3. This will see the final engagement with EU funding under the European Regional Development Fund, the development of new business support programmes and funding streams for the Borough, and the engagement of new sectors such as the green economy, the circular economy and increased digital enablement for the Borough.

The following section outlines the key areas of engagement over the next twelve months, which will see the final spend of ERDF funding, with a concentration on small business recovery and development in response to COVID 19, and development of new key sectors such as Circular Economy and Active Economy actions.

'Theme	RECOVERY			
Work Stream: Business Development	Operational Actions	Link to Community Plan 2017-30	Operational KPI:	Notes on Timescale
Services				
Business Start/Business Survival - Engagement and Communications	Provision of information through Ezine, Facebook, Twitter, Website. Running and supporting Business Events.	ACTION 23 - Provide a post Covid-19 recovery programme in key business sectors through existing programmes and Government interventions	Engagement with 1000 businesses on a weekly basis. 10 business events managed or supported (or webinars provided) each year. Marketing support provided for all programmes in the Prosperity and Place department. Events are both proactive and reactive, depending on need. The budget also supports a range of online promotions of the service.	This is an important ongoing function of the Unit. During Lockdown, over 500 enquiries were signposted to internal and external partners. Core service - continues throughout the year
Information and Research	Ulster University Economic Policy Centre reports and updates. Business Plan monitoring. Responses to internal and external queries	No link	1 Policy Centre Report for Council annually; 2-3 investigative works throughout the year allied to current priorities in workforce development or other trends Prosperity & Place six month review and full year evaluation reports for Council.	It is proposed that the partnership with Ulster University's Policy Centre continues. The information provided is made public and circulated both internally and externally. The monitoring function extends across the service and to programmes which are implemented on behalf of central government funders Continues throughout the year

Business Start – Go For It Programme	To stimulate and support business start-ups. This is the region’s entry level business programme, and is currently managed on a joint basis by all councils, with Lisburn and Castlereagh as lead partner.	ACTION 23 - Provide a post Covid-19 recovery programme in key business sectors through existing programmes and Government interventions	125 jobs created via Business Plan Approvals – the majority of this programme is funded by Invest Northern Ireland and the European Regional Development Fund. Additional funding for Start up Programme raising awareness is also provided.	Ongoing throughout the year, and will continue until 2023
Business Start - Encouraging Entrepreneurship	To increase the interest in starting a business. Increasing the longevity and quality of start-ups. Learn to Earn	ACTION 31 - Increase the level of entrepreneurship and indigenous business growth in the Causeway Coast and Glens area	It is proposed that the Digital Youth Programme delivered across schools in the Borough over the past two years should continue. Matching funding for Exploring Enterprise Programme Matching funding for this employability programme.	Due to Covid restrictions, planning is commencing now for the 2021/2 year. Local participation usually includes 10 schools and 400 pupils to participate. Programme continues until 2022, but is reviewed on an annual basis Funding continues for two more years; however, early engagement is beginning on a locally-based job activation programme in conjunction with local providers
Business Survival - Alchemy	To deliver the Alchemy Programme which will be the Council’s main business growth support provision offered to businesses (including social enterprises) based in the Council area.	ACTION 23 - Provide a post Covid-19 recovery programme in key business sectors through	3½ year programme targets: 400 businesses registered and supported. In year target includes: Alchemy GROWTH (EU funded) – 100 Alchemy LITE (Council funded) - 50 Additional workshops and group networking are also included.	This is Council’s main engagement programme with developed businesses. Funding has been achieved to sustain it until 2023

		<p>existing programmes and Government interventions</p> <p>ACTION 31 - Increase the level of entrepreneurship and indigenous business growth in the Causeway Coast and Glens area</p>		
External Support to Partner Organisations	Working with local economic development stakeholders to support their activities for local businesses.	No direct link	Sponsorship/support for 4 events/conferences/awards.	
Business Start - Enterprise Fund	Grant funding for businesses trading less than 2 years and in key local sectors.	ACTION 31 - Increase the level of entrepreneurship and indigenous business growth in the Causeway Coast and Glens area	Full allocation of budget. Positive indicators in respect of jobs and sales increases will be measured in the 21/22 financial period	To continue into 2021/22, with consideration for increased funding in line with NI 100 proposals.

Business Survival - Digital Causeway Programme	Matching funding for the successful application for the European Union's Investment for Growth and Jobs Programme	ACTION 23 - Provide a post Covid-19 recovery programme in key business sectors through existing programmes and Government interventions	Programme target of 350 participants by December 2022. In year target of 120 participants + delivery of specialised workshops.	To continue to 2022
Business Survival – Digital Transformation Programme	Match funding will be included for a new EU/INI funded programme which will enhance the offer of Digital Causeway	ACTION 23 - Provide a post Covid-19 recovery programme in key business sectors through existing programmes and Government interventions	No targets set as yet – this is an NI-wide programme run across the 11 councils	Expected confirmation to come in 2021, with roll out for 2021-23
Business Survival - Agrifood Support	Support local food producers and increase awareness and uptake of Causeway Coast and Glens Food Network branding.	ACTION 31 - Increase the level of entrepreneurship and indigenous business growth in the Causeway Coast and Glens area	Working in support of the Taste Causeway Network, which has attracted significant funding through Invest NI's Collaborative Network funding	To continue in line with the funding available from Invest NI, until 2022

Business Survival - DAERA Small Business Grants Programme	The Tackling Rural Poverty and Social Isolation Programme's (TRPSI) Rural Business Development Grant Pilot Scheme aims to sustain and support the development of micro rural businesses across Northern Ireland by providing a small capital grant for the business.	ACTION 31 - Increase the level of entrepreneurship and indigenous business growth in the Causeway Coast and Glens area	£50,000 will yield grants of up to £5,000 each for small rural businesses in the Borough. (19/20 saw 19 businesses supported). No cost to Council as administration funding is provided by DAERA.	It is projected that this will continue in 2021/22
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Service Area: 4	STRATEGIC PROJECTS			
Work Stream: Strategic Projects	Operational Actions	Link to Community Plan	Operational KPI:	Notes on Timescale
Connected Borough - Digital Economy	Implementation of a new Digital Strategy for the Borough.	ACTION 28 - Develop a Digital Infrastructure Strategy for the Causeway Coast and Glens area to enhance and build upon the Digital Connectivity on offer to individuals and businesses	This will continue the work of the Full Fibre NI project, with a further 18 months to run until completion and continue to work with Project Stratum and any initiatives which fall out from Growth Deal Projects.	This will continue into the next two years, until completion of Full Fibre NI. This will also link to a variety of skills and infrastructure projects to be decided by Council on the basis of the strategy
A Green Borough – Clean and Alternative Energy Provision	To develop and support energy projects which address infrastructure, cost of connections, unit cost and certainty of cost	ACTION 30 - Develop a new Energy Strategy for the Causeway coast and Glens area	Providing ongoing support to the locally-based Girona Project, as well as investigating a Smart Energy Demonstrator Project Lobby, support and source funding for alternative renewable energy projects for the area.	Council will support a local Collaborative Network project with existing and new partners to implement Project Girona, and any other test projects which come forward.
Priority Sector Support - Foreign Direct Investment Material	Promote Causeway FDI proposition for the Borough; key elements include the Enterprise Zone, digital infrastructure development, the	ACTION 26 - Enhance the capability of businesses to enter and expand	Target market prospective inward investment opportunities in key sectors.	Ongoing throughout 2021-2023. This work is part of the ongoing programme of the Unit

	<p>environment and the talent pool of our university and local colleges</p> <p>Train new and existing businesses to improve their export potential</p> <p>Ongoing marketing and promotion of Atlantic Link Enterprise Campus to prospective tenants</p>	<p>outside markets separate to Northern Ireland</p>	<p>Engagement with Invest NI regards attracting FDIs to visit the area.</p> <p>Provide funding towards training new and existing businesses to undertake overseas export visits within the Invest NI framework</p> <p>Working with CBRE and undertaking at least three ALEC briefing events in 2020 Ongoing work with Department and HM Treasury Ongoing engagement with Economic Advisory Group regards Growth Deal opportunities for the site.</p>	<p>A new website – investcauseway.com has been developed, and it is proposed that this will be a key asset in promoting the Borough.</p>
<p>Re-skilling and Up-skilling for the future economy - Workforce Development Forum</p>	<p>Development of a new employability project in conjunction with local ESF and employability providers Focus on resource to help build and deliver schemes in conjunction with WDF in 2021/2022 against</p>	<p>ACTION 32 - Enhance and develop economic opportunities for individuals located within the Causeway Coast and Glens area</p> <p>ACTION 33 - Develop a co-ordinated plan to increase skills</p>		<p>Planning and development will take place in early 2021, with liaison with the Department for Economy to ensure early buy-in.</p>

		within the Causeway Coast and Glens area targeting actions to meet the local industry needs		
A Green Borough – The Circular Economy	New project – it is proposed that Prosperity and Place will work with partners in Environmental Services, Strategic Investment Board and other partners to help develop a Circular Economy Strategy over the next year. This will also overlap into reskilling and opportunities for the Social Economy. Projects may involve targeting a single sector to help address both waste and financial opportunities.	No immediate link	Develop a circular economy strategy, and identify a key sector and series of projects. A first stage will be to gauge levels of potential activity in the Borough and appetite for local businesses to join in.	Development throughout 2021

Service Area: 3	RENEWAL			
Work Stream: Regeneration and Town & Village Management	Operational Actions	Link to Community Plan	Operational KPI:	Notes on Timetable
Services				
A Renewed Place - Village Regeneration Grant Programme	Exploration of a potential Council-funded programme of Village Regeneration. Potential programme to address the underfunding of village public realms through a series of small scale grants through Community Associations	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	If agreed by Members, planning and application rollout in 2021, with roll out of first scheme in 2022	If agreed by Members, planning and application rollout in 2021, with roll out of first scheme in 2022
A Renewed Place – funding from Department for Communities	Department for Communities provides large scale funding for town centre regeneration in the six main towns in the Borough.	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	Design and build for Ballymoney in 2021 ReVitalise Programme as agreed by the Department for 2021 Review of Town Centre Strategy for Ballycastle	Ongoing through 2021
A Renewed Place - Bushmills T&T Hub project	Funding has been requested to advance concepts around the development of solutions to the parking issues around Dundarave	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	Commission new visuals and engagement with local community – no funding has been identified yet for the full project, however this project will be used to gain local agreement with solutions. There is no current end-date	First visuals are complete, and consultation will begin in early 2021. Funding remains in doubt given the focus by Department for Communities on larger towns.

			for implementation due to funding.	
A Renewed Place – Consultation Network for towns centres and similar grouping for rural network	In response to requests, P&P will establish specific stakeholder networks for regular contact between Council and these centres	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	Initial work will establish KPIs for these centres, as well as conducting regular perception surveys. Baseline data will be used from our existing footfall counters where relevant. As comprehensive as it can be, given the nature of the work, a database will established for vacancy and use	Ongoing throughout 2021 and beyond
A Renewed Place – continuation of small scale interventions for Place Management	Matching funding for initiatives to provide clean, safe, green and vibrant town centres <ul style="list-style-type: none"> • calendar of events for meanwhile spaces • calendar of banner installations • travelling art installations – operational costs <p>Continuation/develop of Covid19 RRP project ideas & outcomes from Masterplan reviews</p> <ul style="list-style-type: none"> • digital communication 	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	‘Mapping’ of town centres. Continue community banner projects across all current towns and develop calendar Investigate Management process of events spaces within town centres Emergency clean up available prior to events, or assist in graffiti removal, depending on need	Ongoing throughout 2021 and beyond

	<ul style="list-style-type: none"> scoping for masterplan review actions 			
A Renewed Place – Public Spaces sub-strategy	<p>There is a range of activity which will continue on as per “usual business” – including Causeway Market, BID, the current DfC Covid Recovery work and so on.</p> <p>However, given feedback from consultation and subsequent reflection on the service needs, it is proposed to develop a short sub-strategy for further and future interventions</p>	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	<p>Completion of sub-strategy</p> <p>Identification of the key projects which address the issues raised by local stakeholders</p> <p>Regular stakeholder group feedback on key issues</p> <p>Note: this is a multi-disciplinary piece of work, which will encompass several areas of Council’s work</p>	To be completed by mid-2021
A Renewed Place – Developing the Active Economy	<p>An active economy drives significant economic and social benefit to an area including direct benefits related to economic growth and employment, and indirect ones such as those related to social relationships. Indirect benefits include the development of skills essential to innovation and economic diversification.</p>	ACTION 17 - Create opportunities to explore, develop and maintain public spaces throughout the Causeway Coast and Glens area	<p>Engagement with Ulster University and a range of partners to explore potential for the development of the Active Economy within the Borough</p> <p>Explore funding options for the creation of a working plan or sub-strategy for Active Economy, involving economic development, regeneration,</p>	To be developed throughout 2021 in conjunction with Ulster University

			<p>sport and well being, tourism and other dependent sectors</p> <p>First steps will be to map those stakeholders, assets and resources required to identify and implement some quick win projects</p>	
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Additional Theme	NI 100 Centenary Projects			
Work Stream: Aligned throughout all elements of Prosperity and Place	Operational Actions	Link to Community Plan	Operational KPI:	Notes on Timetable
Services				
To assist Community and	<ul style="list-style-type: none"> Business Expo 	No immediate link	Completion of operational actions as set out	Rolled out throughout 2021

<p>Culture in implementing a series of projects aligned to NI 100 commemorations</p>	<ul style="list-style-type: none"> • Working with external partners to celebrate local achievements over the past 100 years • Promotion of our local producers • Town centre dressing • Potential enhancement of the Enterprise Fund to develop a one-off Innovation Fund for the year 		<p>Links with Business Survival, A Renewed Place and other promotional opportunities</p>	
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