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1.0 BACKGROUND AND METHODOLOGY

1.1 BACKGROUND AND LOCAL CONTEXT

Lisburn City Council's Physical Development Strategies adopted in 1996 and 2002 both promoted the expansion and development of the Lisburn urban area to the South and West. The 2002 Physical Development Strategy underpinned the Council's position throughout the Belfast Metropolitan Area Plan (BMAP) process referring to the important strategic location of West Lisburn and highlighting the need for major infrastructure requirements such as the M1/Knockmore Link Road and the West Lisburn Rail Halt/Park n Ride.

The West Lisburn area is not only at the confluence of two of the main transport corridors in the northern part of the island of Ireland, but contains a number of key parcels of land, each of which are of at least sub-regional importance in their own right.

- Sprucefield Regional Shopping Centre has long been heralded as being an attractor of visitors to Lisburn and for the past decade has been the focus for more regionally significant retail investment.
- The Maze Long Kesh Development Corporation launched their vision for their 347 acre site, with headline figures such as the potential for £300m of investment and creation of 5000 jobs and the potential for the site to be a catalyst for wider development in the West Lisburn area.
- Knockmore and Lissue industrial estates have been the centre for indigenous industry and since 2007, the location for Coca Cola's bottling plant for Ireland.
- Between all these areas, the Blaris lands provide a natural expansion for Lisburn city and successive plans and strategies such as the Blaris Masterplan and BMAP have reaffirmed the lands as being an ideal location for a mix of land uses which would benefit from the location at the A1/M1 junction.

These sites and all the land in between, which effectively make up what has become known as the "1000 acre context" are major assets in the area which when working together are of clear strategic importance to the city and indeed the sub-region in terms of delivering economic, physical and social renewal.

Yet, there is no overall strategy in place that provides cohesion between the various plans or establishes a symbiotic relationship between the various parcels of land to ensure they are developed in a comprehensive and integrated manner. This lack of strategic overview or framework within which each of the individual masterplans can progress can be viewed as an obstacle to the West Lisburn area to fulfilling its potential as a regionally significant area for future investment.

It is within this context that Lisburn City Council was keen to develop a framework for West Lisburn which will present its major assets under one co-ordinated strategy in order to attract prospective investors through giving clear advice and guidance of the Council's intentions for the area and so as to help realise what is possible in terms of development in the locality.

1.2 THE BRIEF

Local Councils will take responsibility for planning from April 2015 and they will then be responsible for preparing local development plans. Many Councils are keen to commence planning work now and will be bringing forward what would, under current arrangements, be non-statutory plans, produced by Councils, into the statutory planning process.

Lisburn City Council is due to merge with Castlereagh Borough Council and the resultant authority will be responsible for producing a new local plan for what is now a large portion of the BMAP area.

Against this background and with the clear need to establish a coordinated approach to the planning of West Lisburn, Lisburn City Council wished to produce a Development Framework for the West Lisburn area by way of a first step in the production of a new local development plan for the new Lisburn/Castlereagh Council area.

The West Lisburn Development Framework is to be the overarching strategy document for a portion of the Local Plan area and will establish a vision and strategy and give direction and guidance for future planning and investment for the next 20 years.

Production of the development framework was to involve:

- Review of existing strategies, plans, research and emerging policy direction for the study area (to include, but not limited to, the areas of Maze Long Kesh, Lisburn City Centre, Blaris, Knockmore/Lissue and Sprucefield).
- A series of consultations with relevant stakeholders including council officers and elected members, representatives of Maze Long Kesh Development Corporation, landowners, government departments and agencies, relevant private sector, and other stakeholders
- The project should draw on relevant international best practice in the production of draft, final draft and final Development Framework Document for the study area for the next circa 20 years. The Development Framework must be grounded in practical considerations associated with current and projected market conditions in the context of deliverability.
- The final document will include:
 - Description of plan area
 - Planning context
 - Baseline analysis and key issues
 - Vision and Concept
 - Plan Strategy

- High level policies and proposals
- A high-level assessment of the potential economic benefits that may accrue through implementation of the development framework.
- Action Plan to include a phased approach to implementation, including the identification of short term priority actions; identification of funding sources; and identification of those parties responsible for implementing the various elements of the Development Framework.

The overall aim of the plan will be to facilitate a coordinated approach to economic development in the West Lisburn area to act as a catalyst for wider regeneration and growth in the city and the West Lisburn area through:

- Driving growth and demand by providing a highly competitive business location
- Enhanced visitor numbers and visitor spend
- Providing significant employment in the city that contributes to the wider city, stimulating employment in support services and GVA
- Stimulating productivity levels through higher value functions and sectors
- Accommodation of new start businesses as well as the potential for attracting Foreign Direct Investment to high knowledge intensity uses.
- Provision of new infrastructure, housing and services and associated employment during construction.
- Property value increases,
- Increases in the turnover of local businesses
- Increases in local incomes

1.3 REGIONAL CONTEXT

West Lisburn occupies a unique location in Northern Ireland, at the confluence of the main north-south and east-west transport corridors. The A1 is the main transport corridor linking Northern Ireland with the Republic and in turn provides a link to ports and airports via the M1 with connections to GB and on to Europe. There are few such strategically important locations on the island of Ireland and this in itself has ensured that the lands around the A1/ M1 junction to the west of Lisburn have long been recognised as being of regional significance and the subject of major investment.

Figures 1, 2 and 3 illustrate the important strategic location within the context of the island of Ireland, Northern Ireland and the greater Belfast area.

The regional importance of the subject lands are reflected in specific references in the Regional Development Strategy 2035 (RDS). Under policy SFG1, Sprucefield is recognised as a regional out-of-town shopping centre; West Lisburn/Blaris area is identified as a major employment/industrial location to facilitate regional economic growth and both Blaris and the Maze Long Kesh site are identified as regionally important development locations for flexible commercial accommodation and business park developments (p.52).

Considering this strategically important location, any future development in the West Lisburn area will also have the potential to be of regional importance. Such development not only has implications for the immediate locality and Lisburn City Centre, but also the greater Belfast area and the regional as a whole.

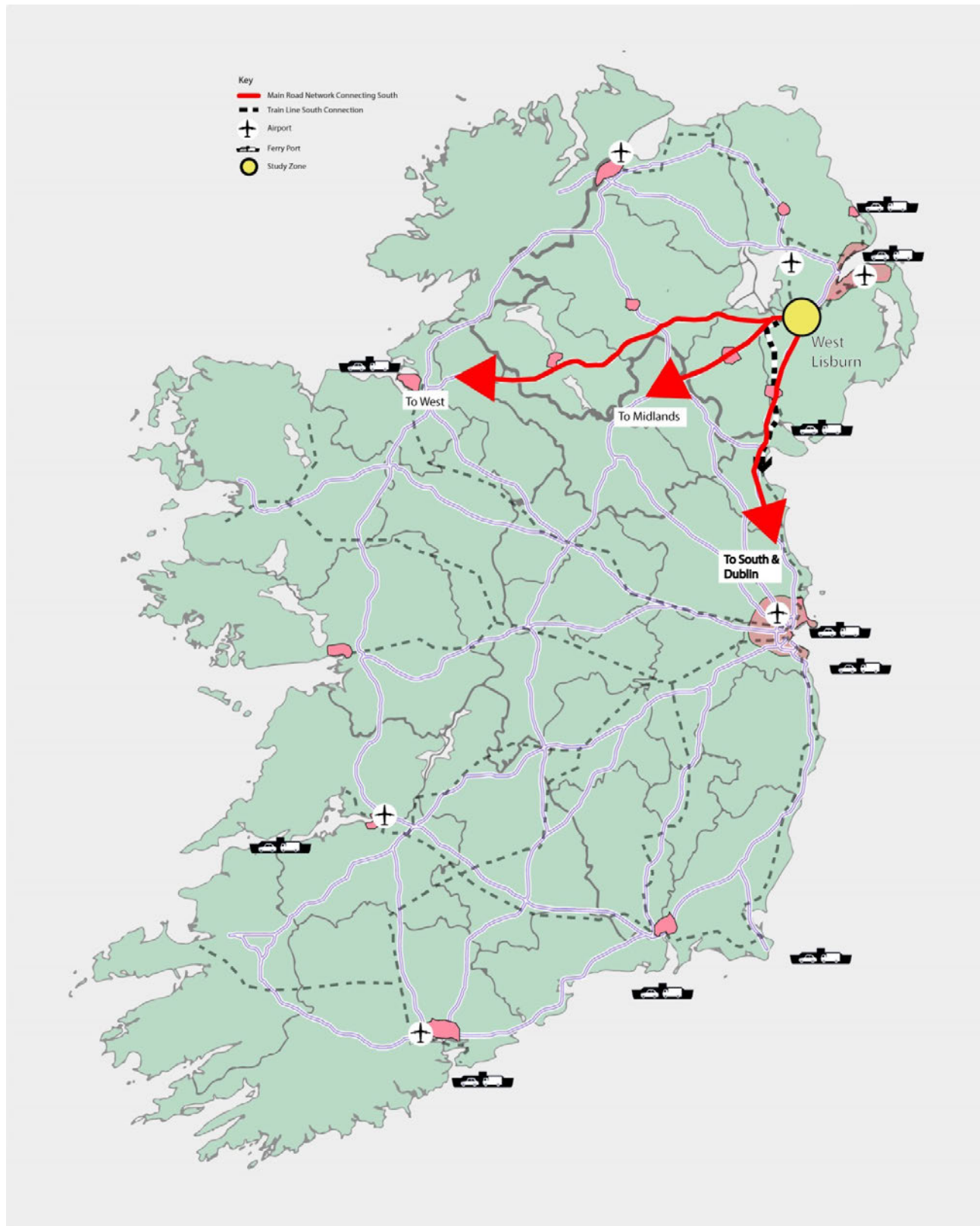


Figure 1 – Island of Ireland regional context of study area

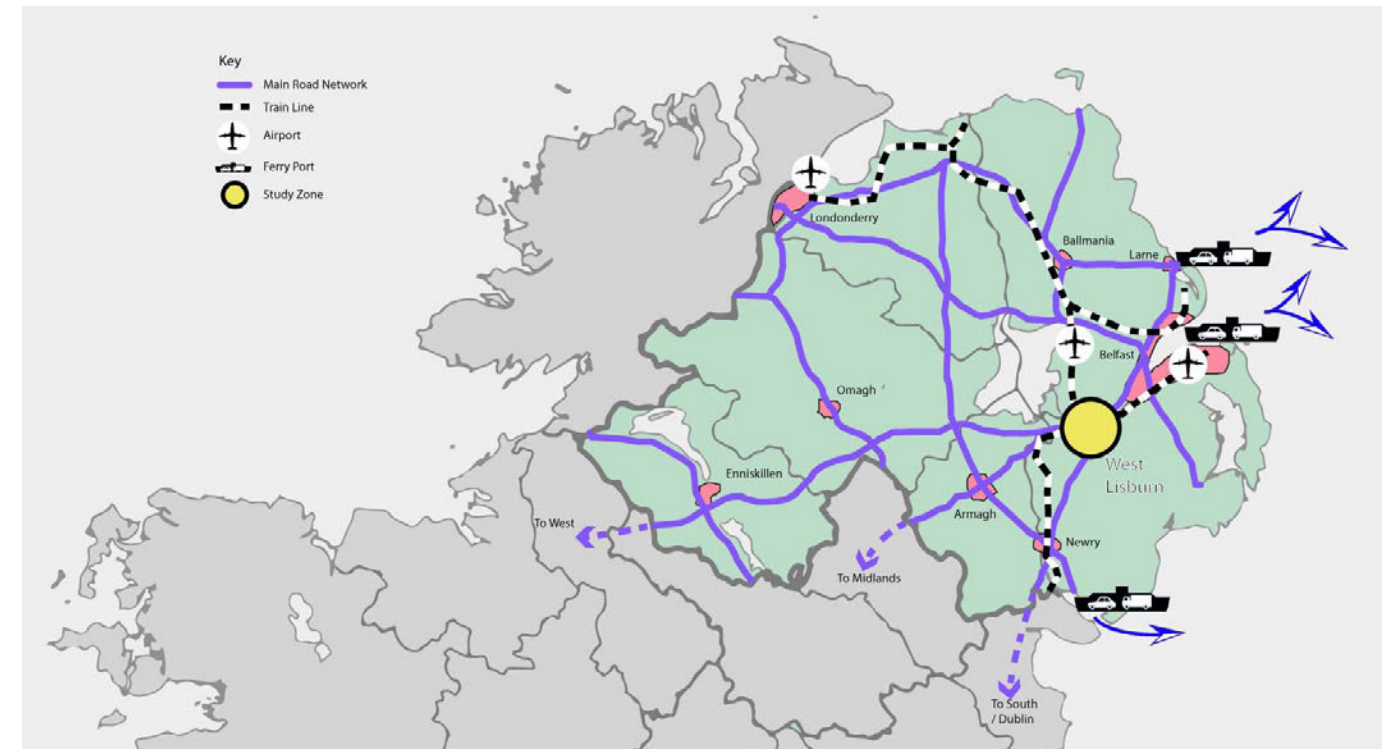


Figure 2 – Northern Ireland regional context of study area

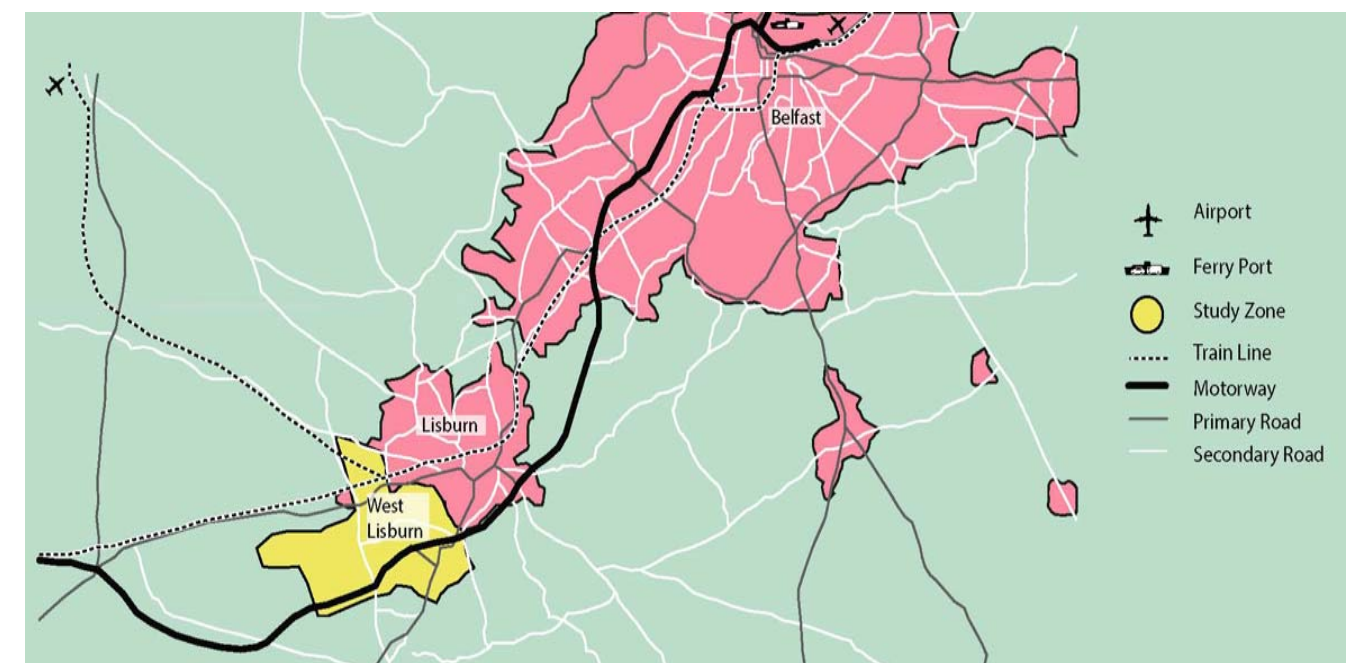


Figure 3 – Greater Belfast context

1.4 THE STUDY AREA

Figure 4 is a map showing the study area for the Development Framework covering an area which is now recognised by the Council as defining West Lisburn.

The northern boundary of the study area is defined by the Ballinderry Road to the north of the Knockmore Industrial Estate. Going in a clockwise direction the study area boundary follows the Knockmore Road south and then east along the River Lagan to Moores Bridge and the Ravarnet River.

The development limit around Sprucefield defines the eastern side of the boundary, which then follows the line of the A1 to the junction with Harrys Road. The southern boundary runs along Harrys Road and Aghnatrisk Road to the north of Culcavey.

The villages of Kesh Bridge and Long Kesh are included along the western side of the study area, as is Down Royal Racecourse and Lurganure village up to the edge of the Moira Road. The boundary crosses the Moira Road at Lurganure Road and follows Cross Lane, Lissue Lane and Lissue Road to where it meets up again with Ballinderry Road.

The lands within the boundary include Knockmore/ Lissue, Blaris, Sprucefield, Lisburn Golf Course, part of Culcavey, Halftown, Kesh Bridge, Long Kesh, Lurganure, Maze Long Kesh (MLK) and Down Royal Racecourse covering an area of approximately 3,500 acres.

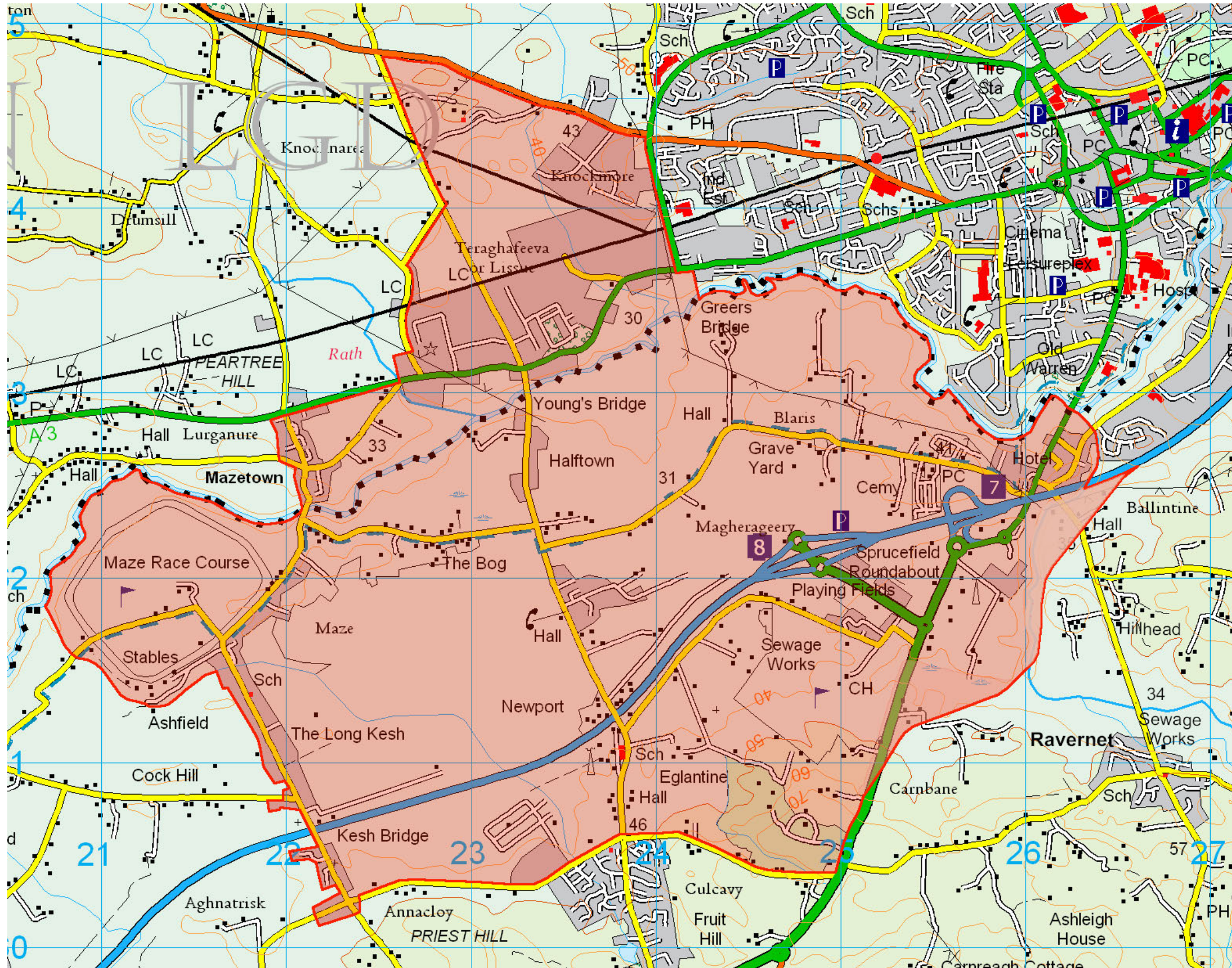


Figure 4 – Lands within the Study Area of the West Lisburn Development Framework

1.5 THE DEVELOPMENT FRAMEWORK TEAM

In April 2014, Lisburn City Council appointed a team led by Strategic Planning to prepare the Development Framework. Details of each member of the team and their area of expertise are listed below.

- Strategic Planning – planning consultants
- AECOM – urban design, landscape architects, transport and infrastructure engineers
- RSM McClure Watters – economic advisors

1.6 METHODOLOGY

The methodology and approach to developing the plan followed a number of stages, with various tasks undertaken at each stage.

Stage 1 - Data Gathering/Establishing Baseline

This initial stage was essentially an audit of the current situation within the study area and concluded by establishing the issues within which work on a development framework can proceed.

The first step was to review all existing plans that relate to the study area that have already been completed.

A visit of the study area was also undertaken to record and assess the physical environment. The identification of key physical and environmental issues and constraints/ opportunities help to set the parameters for the WLDF.

Consultation with identified stakeholders, statutory bodies and other interested parties was undertaken at this stage, in order to obtain views from those located in or with an interest in the subject lands. The responses provided another layer of knowledge in terms of the existing baseline of the study area and helped to inform potential opportunities and constraints for the WLDF.

Stage 2 - Analysis and Draft Proposals

The outputs from stage 1 were then analysed and translated into Draft Framework proposals during Stage 2.

These proposals were formulated to assist the delivery of the WLDF vision (as agreed with Lisburn City Council). An overall concept for the West Lisburn area was prepared to illustrate these proposals and policy objectives for the WLDF were prepared that are based on a zoning plan for the West Lisburn area.

The outcome of Stage 2 was a series of draft plan proposals and a written report that explained and supported them. A further round of consultation was undertaken at this stage, to gauge opinion and feedback from the previously identified stakeholder groups that provided feedback during stage 1.

Stage 3 – Final Development Framework and Delivery Plan

All comments received from stakeholders were reviewed and the plan was updated (where required) in response to these comments.

A final development framework was produced and a delivery plan was prepared that set out a number of actions to be completed, responsible authorities, partnering bodies and potential revenue streams. Each action was measured in terms of importance to the success of the framework and a phasing plan was also prepared that clarified the order in which actions should take place.

1.7 STATUS AND PURPOSE OF THE FRAMEWORK

Planning powers are due to transfer to the new local Councils in April 2015. In anticipation, Lisburn City Council wishes to establish a development framework for the lands to the west of Lisburn, which are considered to be one of the most strategically important areas of land within the new Council area.

The West Lisburn Development Framework (WLDF) has been produced taking account of the Regional Development Strategy 2035. However it has not been subject Examination in Public, Strategic Environmental Assessment or Habitats Regulation Assessment and as such is a non-statutory framework plan produced with the intention of being the overarching strategy document for the subject lands for the 20 year period to 2035.

It is a statement of Council's intentions and aspirations for the area and is produced with the purpose of establishing a vision and providing direction and guidance to prospective investors, landowners and public bodies.

The Framework identifies potential development opportunities and constraints, sets out potential land uses and identifies key assets and how best to realise their full potential in a cohesive and holistic manner. It is therefore an important tool in helping to inform the production of the forthcoming Lisburn Castlereagh Local Plan, which the Council will commence preparation of in 2015.

2.0 BASELINE ASSESSMENT

This Framework was informed by a baseline assessment which involved a mix of document review, consultation, desk review and on-site investigation.

a. Document Review

A number of reports, strategies and plans have been published in relation to the lands within the study area. These documents range from statutory instruments to spatial frameworks and action plans and relate to a variety of issues including land-use, physical development, transport and economic development. Such reports have been reviewed to ascertain what previous plans have been made for the area and the outputs of each document considered in terms of being integrated or included within the WLDF. The documents reviewed include:

- Northern Ireland Programme for Government (PfG)
- Economic Development Strategy for Northern Ireland (EDSNI)
- Draft Innovation Strategy
- Investment Strategy for Northern Ireland
- Regional Development Strategy 2035 (RDS)
- Lisburn Area Plan 2001 (LAP)
- Belfast Metropolitan Area Plan 2015 (BMAP)
- Physical Development Strategy for Lisburn Borough – March 2002 (PDS)
- Economic Development Action Plan 2012-2015 (EDAP)
- Blaris Development Framework Plan 2009 (BDFP)
- Spatial Framework for Maze Long Kesh 2013 (SFMLK)

There are a number of common themes running through the reviewed plans and programmes that help to inform this framework. These include:

- The promotion and expansion of a range of employment uses in the area;
- The need for multi model transport infrastructure to aid connectivity and facilitate growth;
- Expansion of retailing and a greater role for Sprucefield;
- The potential to increase tourism, recreation and leisure uses along the River Lagan; and
- The opportunity for major local development at Blaris;
- The potential for a range of uses of a regionally significant scale at MLK; and
- To promote social regeneration through access to community services, connectivity between local communities and linkages to Lisburn City Centre and the wider region.

A summary of the key issues identified in the listed documents is provided in appendix 1.

b. Consultation

As part of the information gathering process for the WLDF, views and opinions from a range of stakeholders were sought. This consultation exercise was undertaken to gather views from interested parties, in order to establish local issues, opportunities or constraints.

These stakeholders included statutory and regulatory agencies, land-owners, politicians, businesses, local community groups and other stakeholders located within or with an interest in the study area. This engagement was undertaken through a range of methods including meetings, written correspondence, emails and telephone discussions. A full list of those consulted and a summary table of responses is provided in appendix 2.

c. Desk Review and On-site investigation

The existing condition and key features of the subject site lands have been considered and divided into a number of 'themes':

- Housing and population
- Infrastructure
- Natural and Built Environment
- Retail
- Roads and Transport
- Socio-economic
- Sports/ Leisure and Tourism

An overview of desk-top and on-site findings is provided in appendix 3 and the above topics form the basis for the Framework proposals.

2.1 SUMMARY OF ISSUES

Issues arising from this information gathering and baseline assessment stage of the project are set out in table 1. The table provides a summary of key issues based on document review, existing site conditions, baseline information and comments received from consultees, according to each theme. These issues will then be used to provide a focus for the framework.

THEME	STAGE 1 FINDINGS	KEY ISSUES ARISING
Housing and Population	<ul style="list-style-type: none"> High rate of population growth expected in West Lisburn over next decade (based on previous decade figures). Sufficient housing development land available within study area (based on HGIs and Housing Monitor). Potential to expand existing small settlements (i.e. Halftown) within study area but important to protect rural character. Potential to create a village centre or node in small settlements (i.e. Long Kesh). 	<ul style="list-style-type: none"> Significant new housing development land needed. Slight expansion of existing small settlements possible. Need to provide community focus/node within settlements (i.e. Node at Long Kesh to link community to local resources such as racecourse, golf course etc.).
Utilities and Infrastructure	<ul style="list-style-type: none"> Existing provision adequate to service current demand within study area. Planned development will improve provision. Potential need to expand infrastructure for major development proposals. 	<ul style="list-style-type: none"> Infrastructure likely to be able to accommodate future development in area.
Natural and Built Environment	<ul style="list-style-type: none"> Large portions of land within study area affected by floodplain – affecting development potential. Good quality agricultural land contained within study area. High quality landscapes along river corridor and at various locations throughout area (i.e. LLPAs). Good quality ‘buffer’ landscape to southern section of study area. Limited built form within study area but listed buildings dotted throughout area. 	<ul style="list-style-type: none"> Need to protect river corridor. Avoidance of development on floodplains, except suitable leisure uses. Retain good quality agricultural land and buffer landscape.
Retail	<ul style="list-style-type: none"> Sprucefield development restricted due to policies on types of good for sale and floorspace areas. 	<ul style="list-style-type: none"> Need to promote Sprucefield and facilitate its development and growth.
Employment/Industry and Socio-economic	<ul style="list-style-type: none"> Existing sectors in area include light industrial and distribution. Existing lands zoned for industrial/employment (including Blaris lands) sufficient to meet potential future demand of indigenous sectors. There is no clustering of specific sectors, other than indigenous companies. West Lisburn benefits from locational advantage, i.e. on the north-south and east-west corridors. High levels of employment within study area and good levels of education. High level of new business start-ups within study area. 	<ul style="list-style-type: none"> Need to grow indigenous sectors (i.e. light engineering and retailing). Potential to facilitate development of new sectors with links to area (i.e. agri-food, advanced engineering and creative industries). Highlight excellent linkages to north-south and east-west corridors. Development of bespoke education facility within study area could encourage new business start-ups and new sectors to locate to West Lisburn
Roads and Transport	<ul style="list-style-type: none"> Existing rural roads are inadequate to service existing rural enterprises and major events within study area (i.e. race days at the Racecourse and events at MLK). Doubts around the delivery of the Knockmore Link road (developer funded). Need to consider public funding, as crucial to developing area. The A1/M1 will be delivered (currently at options stage) but currently not in DRD Roads Service programme. Potential to have a western on/off slip from the M1 into the MLK lands. New rail-halt at Knockmore to progress in 2016/17 – opportunity to develop new public transport links from here into and throughout study area. Walking and cycling routes are disconnected around and through the study area. Potential to improve walking/cycling routes along river. Potential to use river corridor for navigation/transport from MLK/Racecourse to City Centre. 	<ul style="list-style-type: none"> Need to improve existing rural road network within study area. Need to prioritise Knockmore Link as main route to facilitate new development. Potential to improve public transport links, following development of new train-halt. Potential for cohesive walking/cycling route along river corridor and throughout area.
Sports, Recreation and Leisure	<ul style="list-style-type: none"> River corridor currently underutilised in terms of recreation and leisure use. Lack of connectivity between sport/leisure features within study area (i.e. racecourse and river corridor). Sport/recreation facilities disjointed from local community. 	<ul style="list-style-type: none"> Potential to develop water sports centre, marinas and connected riverside walkways/cycleways. Closer ties between existing sports/recreation facilities and local community could result in creation of ‘community hub’.

Table 1: Key Issues Arising from Baseline Assessment

3.0 VISION, OBJECTIVES AND STRATEGY

In response to the issues identified following the baseline assessment, Lisburn City Council has formulated the following Framework Vision and Objectives and a Strategy that details how these objectives will be achieved.

3.1 FRAMEWORK VISION

The vision for the West Lisburn Area is:

“To realise the potential of the West Lisburn area by 2035 through setting a framework that recognises and promotes the regionally significant features contained therein and connects these features in a sustainable manner that will promote social and economic growth and prosperity for the entire region.”

The framework vision is based upon the desire to utilise and promote resources currently contained in the West Lisburn area, for the benefit of all for the period 2015-2035.

The area includes major regionally significant and strategically important sites such as the Maze Long Kesh lands, Sprucefield Regional Shopping Centre and Retail Park, Knockmore/Lissue, Blaris lands and Down Royal Racecourse.

West Lisburn also includes natural resources such as the River Lagan, valuable landscapes and high quality agricultural land.

The framework vision is to set out how best to develop, promote and protect these key assets in a co-ordinated fashion, within a logical and robust framework that will unlock their potential for the benefit of not only the greater Lisburn area, but also the wider region.

3.2 STRATEGIC OBJECTIVES

This vision will be realised through the implementation of the following Strategic Objectives. They address key growth themes and are all inter-related and, as such, they should be considered holistically in order to achieve the plan vision.

- Objective 1** *Prioritise the development of the Knockmore Link Road as the key piece of infrastructure required to unlock the development potential of West Lisburn*
- Objective 2** *Improve existing and develop new integrated multi-mode transport infrastructure into and throughout West Lisburn*
- Objective 3** *Promote new and expand existing employment uses in the West Lisburn area*
- Objective 4** *Promote and encourage appropriate development at the Maze Long Kesh site to reflect its status as a ‘Strategic Land Reserve of Regional Importance’*
- Objective 5** *Encourage the development of new residential development to support growth in the area, whilst respecting existing settlements*
- Objective 6** *Protect and enhance significant and valuable landscape areas and waterways*
- Objective 7** *Protect and enhance the ‘Regional Significance’ of Sprucefield and expand its retailing role*
- Objective 8** *Increase sport, recreation and leisure activity in the West Lisburn area, with a particular focus on the River Lagan corridor*

3.3 FRAMEWORK STRATEGY

The Framework Strategy is to grow Lisburn city in a south-westerly direction in order to take advantage of the unique locational setting of these lands at the junction of Northern Ireland’s two main transport corridors, the M1 and A1. The plan will capitalise upon the potential of the significant features of West Lisburn, including the Maze Long Kesh lands, Blaris lands, Sprucefield, Knockmore/Lissue, Down Royal Racecourse and the River Lagan.

The plan will facilitate sustainable economic growth at key locations such as Maze Long Kesh, Knockmore and Blaris; enhance the ‘regional significance’ of Sprucefield Shopping Centre and increase tourism, recreation and leisure uses in the West Lisburn area. It is important to support this growth through the creation of a critical mass of population by encouraging new residential development in West Lisburn, which will ensure growth in the area is sustainable. Significant natural assets, such as the River Lagan corridor and associated floodplains, will be utilised for appropriate uses but also protected from inappropriate development.

It is clear that in order to realise the potential of key assets within the study area, major investment is required for road, cycle and rail improvements. The development of new routes and connections throughout the site will unlock certain areas for appropriate development and act as a catalyst for social

and economic development in the area. The vital component of new transport infrastructure is the Knockmore Link road, which will provide direct access into the study lands from the M1 and act as the main distributor road for the entire West Lisburn area.

The improvement of connectivity to and throughout the study area will facilitate the expansion of existing and promotion of new areas of employment. The improved transport network and ease of connection to major transport corridors will be a key incentive to indigenous companies for expansion and growth and it will also encourage inward investment. The existing industrial area at Knockmore/Lissue provides the ideal location for expansion of indigenous companies.

The improved connectivity of the West Lisburn area will also act as an attractor to potential foreign investors and/or new employment sectors to the area. Maze Long Kesh is designated as a 'Strategic Land Reserve of Regional Importance', which creates the potential to attract regionally significant employment and other uses.

The Knockmore Link road will also create a transport 'hub' close to the Blaris lands, which would then be suitable for a new distribution/logistics centre. Such uses currently exist near Culcavy, which is predominantly residential in character and the warehouse/ distribution uses at this location are not conducive to the amenity of a small settlement. The opportunity exists to relocate the Culcavy storage and distribution uses to a new location closer to the M1/A1 transport corridors.

Sprucefield Regional Shopping Centre is a well-established asset within West Lisburn. It is currently not fulfilling its role or realising its full potential as a 'regionally significant' retailing centre. This is due to a number of factors but primarily the current restrictive nature of permissible retail offering and floorspace sizes. In order to enhance Sprucefield and take advantage of its strategically important location, the encouragement and promotion of a greater range of retailing offer is required.

West Lisburn has a number of recreational assets including Down Royal Racecourse and Down Royal Golf Course, Lisburn Golf Course and Lisburn Rugby Club; all of which are major attractions that would benefit from greater connectivity and protection. The River Lagan is a major natural asset running through the area and provides the opportunity to develop new tourism, leisure and recreation facilities, as well as acting as a physical link to some of these existing attractors. The Maze Long Kesh lands also have great potential in terms of cultural and historical tourism, given its history. The plan will encourage greater access to these key tourism and recreation assets.

Considering the potential growth of the West Lisburn area, there is the need to ensure that there is an associated growth in the local population to sustain and support this growth. Whilst there are identified lands in and around North-West Lisburn for residential development, there is likely to be additional demand for the expansion of residential areas in West Lisburn to support growth in the area. The development of residential areas close to employment, retail and recreation areas in West Lisburn will be sustainable, as living places will be close to working, shopping and recreational places.

It is important to ensure that the growth envisaged for the West Lisburn area does not compromise existing valuable landscapes. The most notable area is the river corridor that supports a wide variety of flora and fauna. Whilst this natural resource can be used for tourism, leisure and recreational uses, it

should also be protected from inappropriate development. In addition, certain lands close to the river act as floodplains and it is not feasible to develop these lands (except for related recreational uses). The plan will seek to guard against settlement coalescence and protect those areas of landscape that provide visual relief and enclosure.

The Strategic Objectives and key aspects of the Framework Strategy are illustrated in the 'Spatial Strategy' map in figure 5.

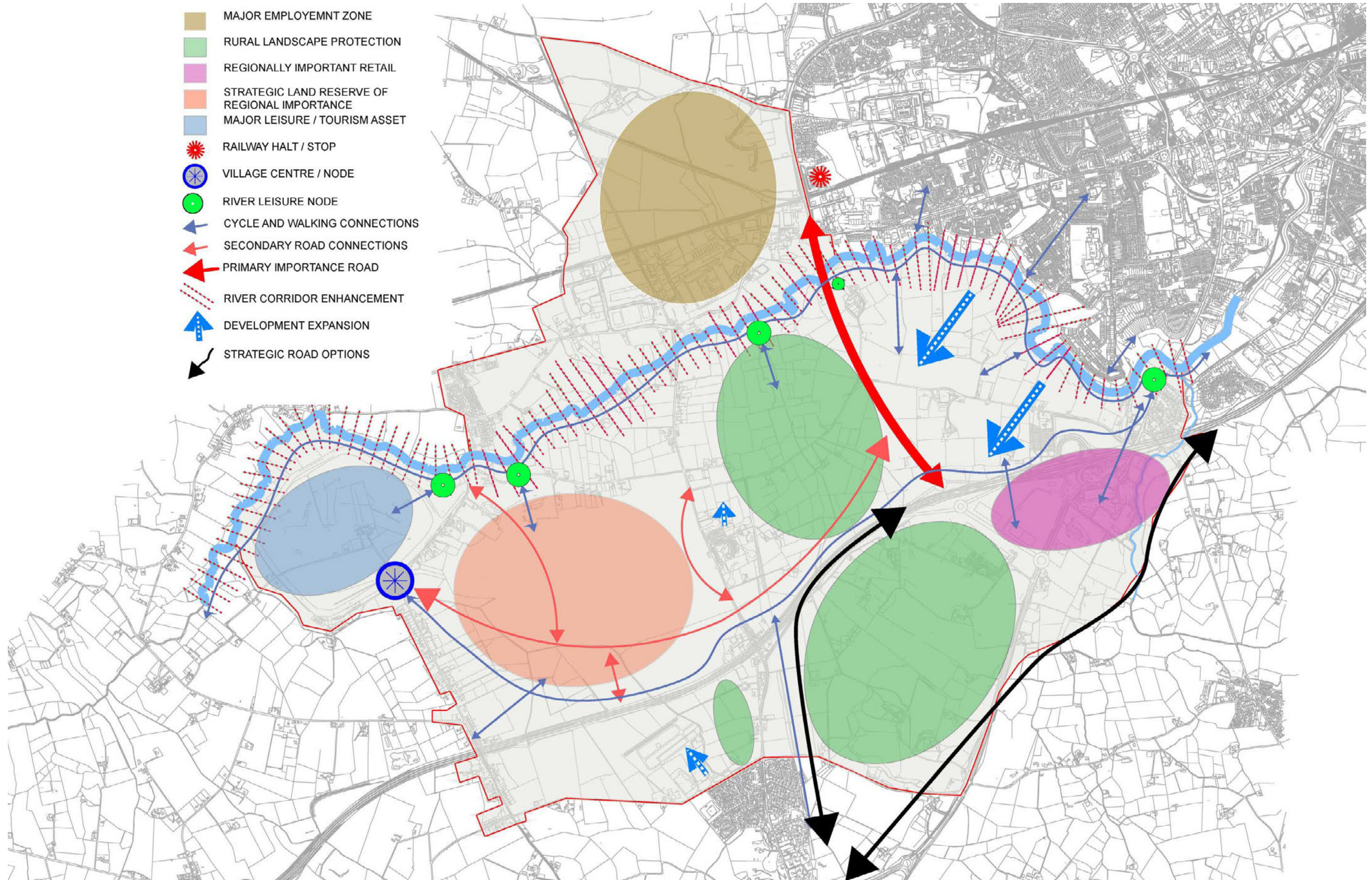


Figure 5 – Spatial strateg

4.0 PLAN POLICIES

Figure 6 is a Zoning Plan which adds an extra layer of detail onto the above Strategy. It indicates the land uses which the plan proposes for the period 2015-2035. The sections which follow are written under the headings of each of the Strategic Objectives and set out how the policies and proposals will ultimately achieve those objectives and in turn the Plan Strategy and Vision.

The stakeholders identified during the information gathering exercise for the WLDF, were consulted again on a draft version of the Zoning Plan. A summary of comments received and how these comments were considered and/or influenced the final Zoning Plan and wider WLDF is provided in appendix 4.

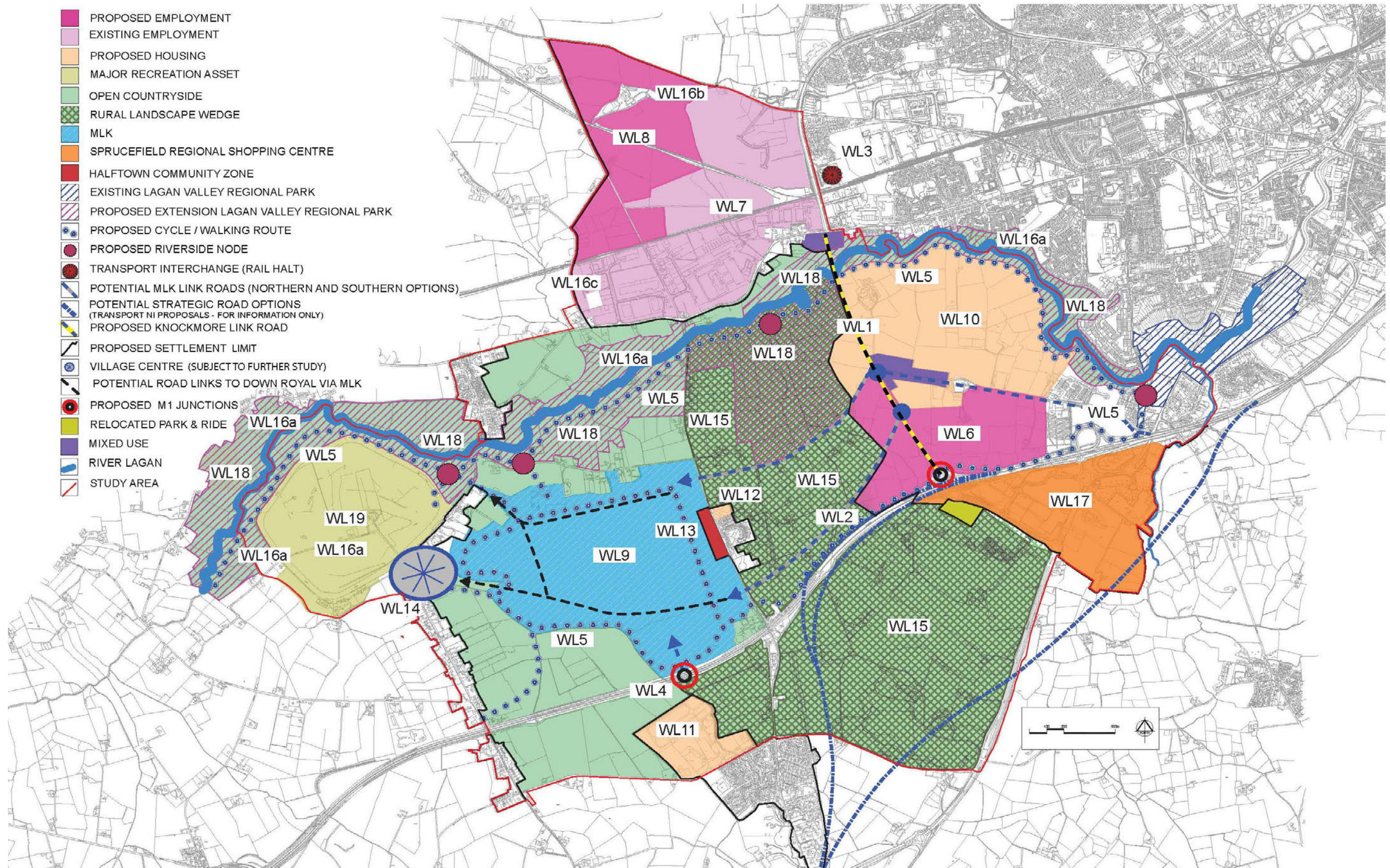


Figure 6 – Zoning Plan

4.1 KNOCKMORE LINK ROAD

Objective 1 – Prioritise the development of the Knockmore Link Road as the key piece of infrastructure required to unlock the development potential of West Lisburn

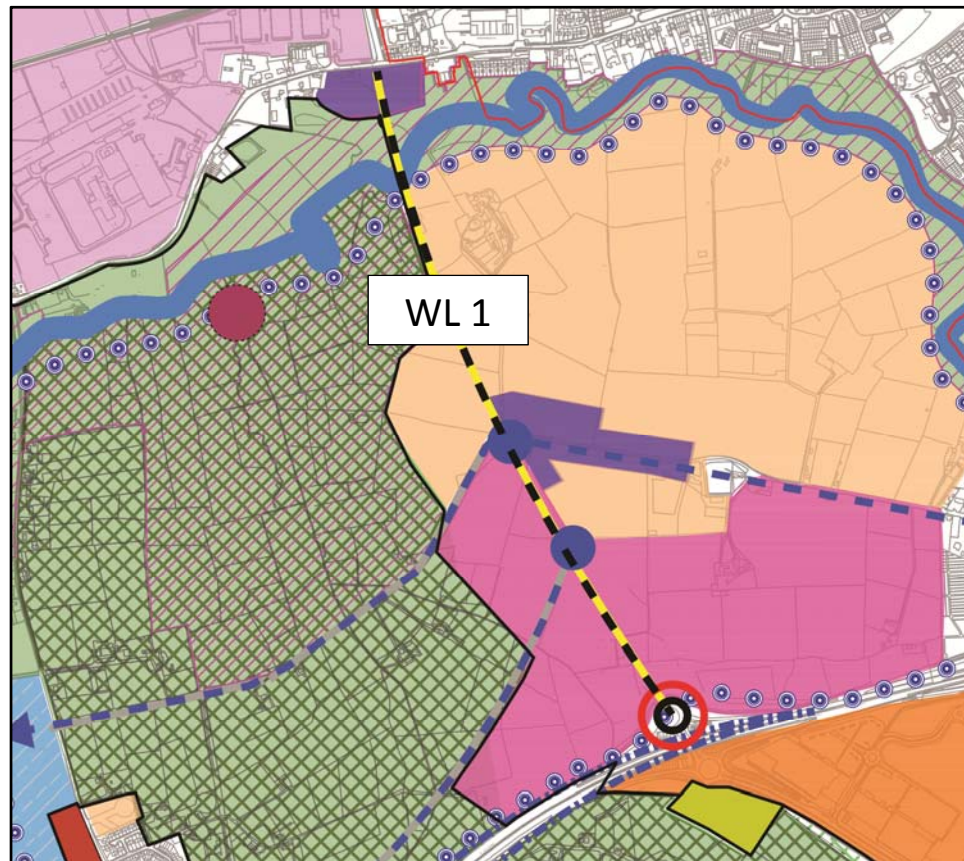
Given the current rural environment that dominates West Lisburn, primacy must be given to developing a suitable road infrastructure network in order to realise the development potential of the area.

The Knockmore Link Road is a vital piece of infrastructure that must be delivered as soon as possible in order to unlock large areas of development land in the West Lisburn area.

The Link Road is an important element of the overall development framework as there is a significant link between infrastructure investment and economic growth and other public policy goals. For example, Knockmore Link could reduce congestion into the centre of Lisburn. It will also provide a more direct connection to the M1 motorway and A1 dual carriageway for those employment zones within this framework plan and the Maze Long Kesh site. In addition, the connectivity for the greater West Lisburn area is increased especially for those employment zones and the Knockmore Link will help this by providing more competitive access to markets. In terms of the residential zonings, the link will also help the accessibility for communities, both existing and proposed. It will also facilitate good public transport accessibility to the site, particularly helping general and 'event' demand to Maze Long Kesh.

Designation WL1 - Knockmore Link (link road of strategic importance)

This road is required to unlock the development potential of West Lisburn and should be considered as being of 'strategic importance' to the region. The Knockmore Link would act as a district distributor but is also of strategic importance being the main access off the M1 Motorway. This proposal is key to the delivery of the overall development framework. However, it is unlikely that this road will be delivered by a private developer, instead, the success of the implementation of the plan is dependent on the public sector building this road in order to facilitate development throughout the plan area. It will therefore continue to be the policy of Lisburn City Council to lobby government to secure funds sufficient to build this road and the connecting bridge across the River Lagan to the Moira Road.

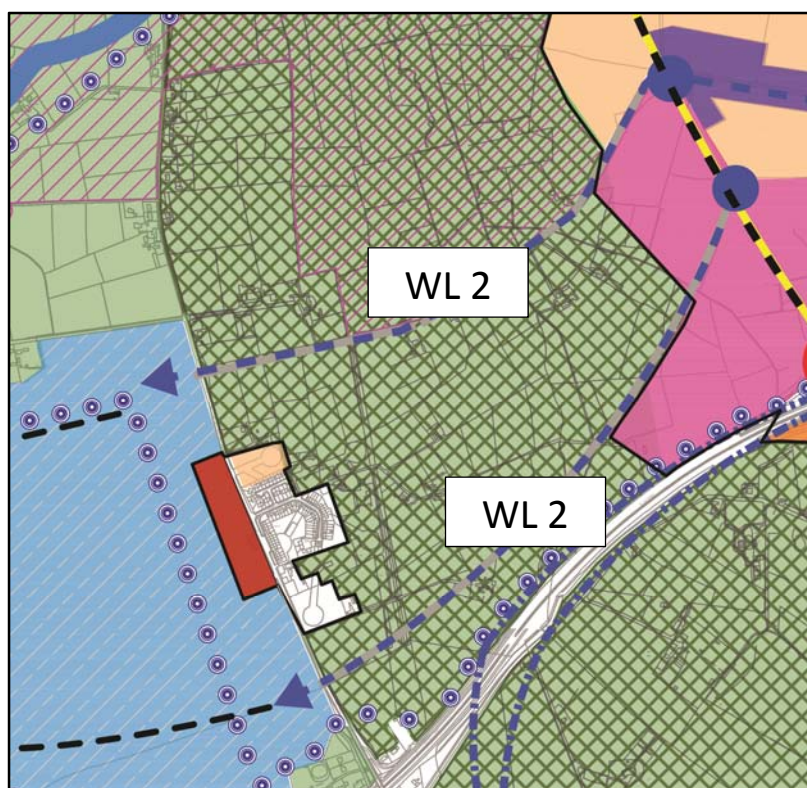


4.2 INFRASTRUCTURE AND TRANSPORT

Objective 2 – To improve existing and develop new integrated multi-mode transport infrastructure into and throughout West Lisburn

Transport plays an important role in land use planning, and integrating transport with land use is an essential criterion for the development of any plan. In this context, transport contributes to the level of accessibility of the plan with the opportunity to ‘unlock’ development lands, as demonstrated by the importance of the Knockmore Link Road. The approach to accessing development lands should be balanced with a range of transport measures (including roads, public transport, pedestrian and cycle facilities) included.

Specific access arrangements for each development zone will be required to be developed at detailed design stage and internal highway network and access arrangements will be required to be designed to an appropriate standard. In addition, any necessary improvements to the highway network outside the immediate zone will also be required to be considered in order to facilitate the development. Other transportation measures, such as walking, cycling and public transport should also be considered where appropriate. These considerations should be included in a Transport Assessment for part or all of the development zones where appropriate and/or required.

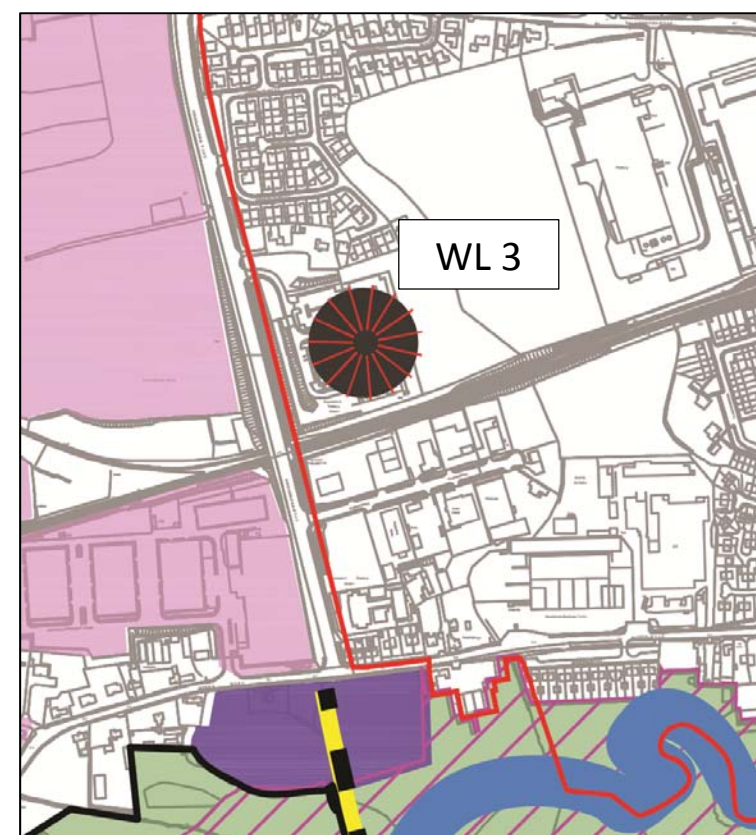


Designation WL2 - Local Distributor Roads

These roads are proposed to be taken off the Knockmore Link road and provide the main access into and service of the Blaris and Maze Long Kesh lands. There are currently two options for a local distributor road into the Maze Long Kesh lands, with the final decision to be determined by Lisburn City Council in association with the Maze Long Kesh Development Corporation.

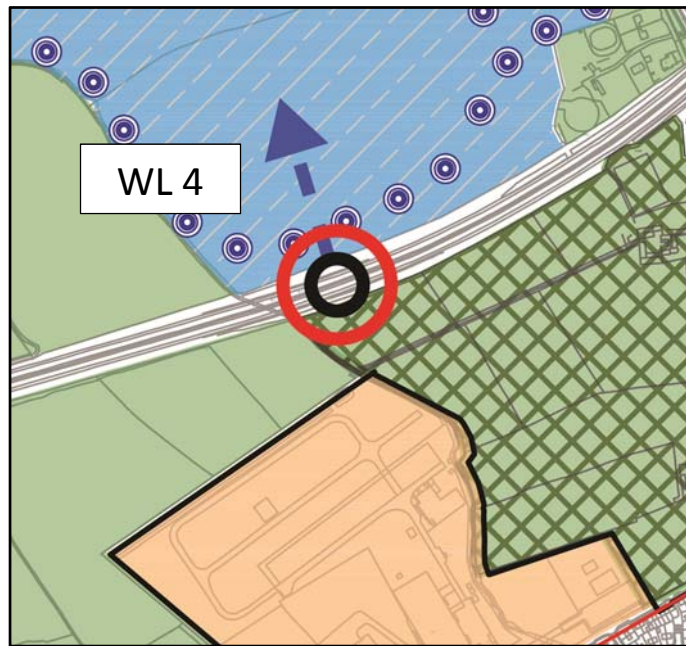
In addition, Transport NI has plans to construct a new motorway link between the M1 (between junctions 6 and 8) and the A1 (south of Hillsborough Roundabout). Two route corridors are under consideration. A central route runs to the east of the existing A1 around the rear of the Sprucefield Shopping Centre ‘landing’ to the south of the A1/Hillsborough Roundabout. The Culcavy East Route runs from the M1/A101 junction to the same location south of the A1/Hillsborough Roundabout.

The Culcavy East Route would result in an additional link onto the M1 at or close to Junction 8 and could make the design of the vital Knockmore Link Road geometrically difficult to achieve. Given the importance of this road to the success of delivering this plan, the Culcavy East Route option would not be welcomed by Lisburn City Council. Therefore, for the purposes of facilitating the development of the West Lisburn lands, Lisburn City Council’s preferred route is the Central Route Option, which runs to the east of the Sprucefield Shopping centre.



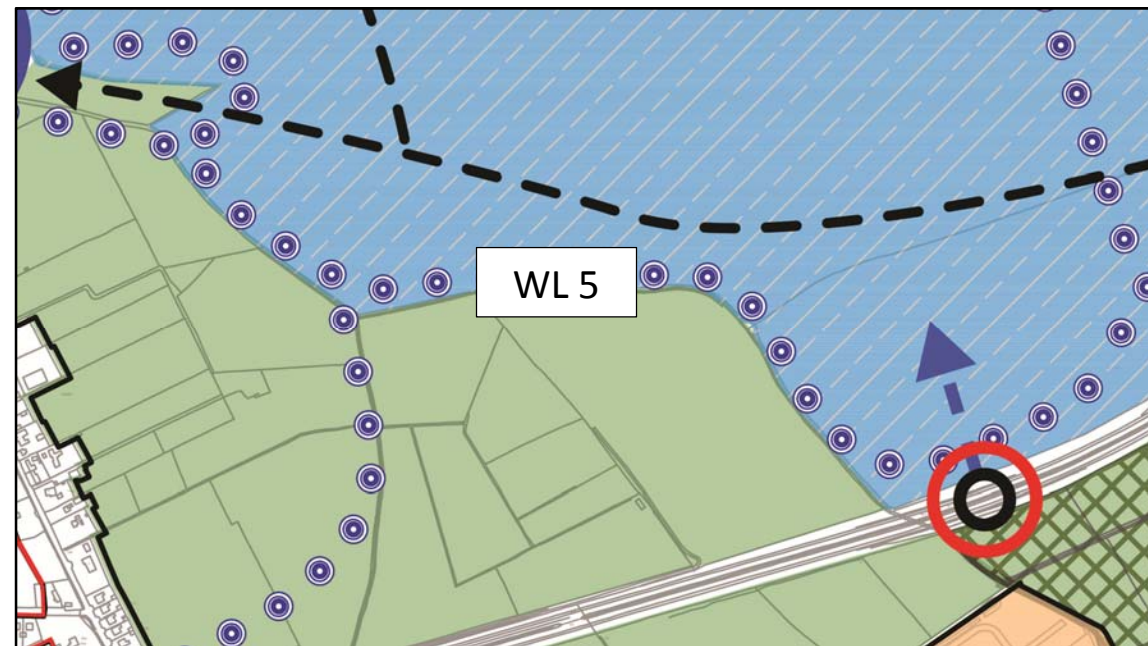
Designation WL3 – West Lisburn train halt & Park & Ride facility

The location of a new rail halt/station to West Lisburn will facilitate employment/industry/leisure opportunities in the area. This new halt/station will also require feeder bus connections that serve the West Lisburn area, the Maze Long Kesh site and wider area, thus creating a transport interchange between bus and rail. The Park and Ride site adjacent to the proposed West Lisburn rail halt/station will encourage travel by train.



Designation WL4 – Direct access into Maze Long Kesh/West Lisburn from M1 (west-bound on/off slip).

This secondary access off the M1 Motorway for West Lisburn is part of the plans by Maze Long Kesh Development Corporation with the primary purpose to access and facilitate the development of the Maze Long Kesh lands. It is envisaged that traffic will eventually be able to access West Lisburn via the Maze Long Kesh site.



Designation WL5 – Development of an integrated network of Pedestrian and Cycling Routes

A series of walking/cycling infrastructure will be developed through a range of routes connecting into other facilities around the site, including sections on the National Cycle Network (NCN) (The NCN 9 runs through the study area (east-west) connecting Lisburn to Moira). The route of this walkway/cycleway should include a section along the riverside, which can link existing and proposed recreational facilities in the area.

In terms of future utility infrastructure requirements in the West Lisburn area, the following table provides an overview of potential demand, based on the various land-use types envisaged for the area. All future significant development proposals should ensure that sufficient infrastructure is available to service the proposal or include necessary infrastructure improvements as part of the development proposal.

Land Use	Industrial/ Employment	Leisure	Housing	Maze Long Kesh	Retail	Totals
Area	1200672m ²	771453 m ²	910000 m ²	1343794 m ²	97234m ²	4323153m ²
Electricity Demand	4100	17400	15500	41900	2200	81100kW
Cooling Demand	1300	15500	18000	40000	700	75500kW
Heating Demand	1300	7800	15500	17900	700	43200kW
Comms Demand	100	100	100	100	100	100Mb/s
Potable Water Demand	48100	257200	1541200	1076600	24800	2947900l/day
Water Demand	9700	0	231200	193800	5000	439700l/day

Table 2: Potential infrastructure demand based on future development needs.

4.3 EMPLOYMENT

Objective 3 – To promote new and expansion of existing employment uses in the West Lisburn area

Sustainable economic growth underpins Strategic Objective 4 and this plan seeks to promote the growth and expansion of existing and indigenous employment uses whilst also encouraging the creation of new, appropriate employment sectors.

Sectoral Growth

Economic growth forecasts have been carried out for the West Lisburn area, based on current economic and employment sectors within the area and also potential new and/or emerging sectors that are likely to favour the unique strategic location of West Lisburn. An initial 4-year period was used to calculate potential job growth and land requirements to support such growth. This timeframe was used as it resulted in a more accurate and realistic growth projection. The Socio-Economic report in Appendix 2 provides further detail and tabled results.

Long Term Growth Scenarios

As Government, academic and commercial forecasting bodies are reticent to develop forecasts which extend over five years, the WLDF has utilised the existing four year forecast and tested them against the following three scenarios: Certain assumptions were made to extend growth projections over the 20-year plan period and figures for 20-year growth will be subject to review at regular intervals, when the WLDF is reviewed and updated.

- Scenario 1: Under this scenario, the relevant sectoral growth rate is held constant over the entire 20 year period;
- Scenario 2: Under this scenario, the relevant sectoral growth rate is held constant up to year 4, thereafter each sectoral growth rate reduces by 50% and is subsequently held constant for the remainder of the 20 year period; and
- Scenario 3: Under this scenario, the relevant sectoral growth rate is held constant up to year 4, thereafter each sectoral growth rate increases by 50% and is subsequently held constant for the remainder of the 20 year period.

This Framework promotes the development of three distinct major employment zones in the West Lisburn area:

- Maze Long Kesh
- Blaris Lands
- Knockmore/Lissue Lands

This section deals with Employment zonings at Blaris and Knockmore/ Lissue. Maze Long Kesh is subject of a specific Strategic Objective and is detailed in Section 4.4.

a. Blaris Lands

The principal economic activity within this zone is anticipated to be within the transport and distribution sector. The development of the Knockmore Link and the close proximity of the southern section of the Blaris lands to the M1 (and A1 beyond), makes this an ideal location for a new distribution and logistics centre. Anticipated demand for property within this zone will be informed by three variables:

- Relocation of existing S&D businesses from Aghnatrisk Rd, Culcavy (approximately 3 miles away);
- General growth within the transport and distribution sector; and
- The specific impact of the co-location of new sectors at Maze Long Kesh, requiring supporting storage/distribution uses.

Table 3 identifies the number of transport and distribution businesses at Culcavy and their existing property needs:

Number of Companies	Average Number of Employees	Total number of Existing Employees	Existing Property Needs
8	50	400	46,000 sq metres or 18ha

Table 3: Calculation of Existing Property Needs

Table 4 sets out a forecast growth rate for the sector, based on each of the 3 scenarios described above, to confirm future employment growth (including the impact of the co-location of new sectors within West Lisburn) and how this will be translated into future property need over the 20-year plan period.

Scenario 1		Scenario 2		Scenario 3	
Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)
606 (created or sustained)	27.6ha	513 (created or sustained)	23.2ha	713 (created or sustained)	32.7ha

Table 4: Projected 20 year job creation and property need (Blaris)

An analysis of inward investment has taken place. Comparisons have been made between Lisburn and similar sized towns/cities in the UK (such as Lincoln, Bath and Irvine), in relation to the level of inward investment. Lincoln and Bath were considered as they have similar population and population growth forecasts as Lisburn. Irvine was selected due to its similar level of zoned employment lands to Lisburn (see Socio-Economic report in Appendix 3).

Based on this exercise, it can be concluded that Lisburn does not presently have a suitable land bank for inward investment over the plan period and it is therefore, considered prudent to allocate a provisional figure of 10 ha of reserve land for inward investment in this plan for future economic development in the Blaris area. An area of 10ha has the potential to attract up to 720 jobs (not including construction jobs).

In total, the Blaris lands has the potential to create or sustain 1433 jobs over the 20 year plan period (based on growth Scenario 3), which would require 32.7ha. An additional land reserve of 10ha is provided in the plan, bringing the total of land required for economic development at Blaris to 42.7ha.

b. Knockmore/Lissue Lands

This area is well-established with existing and indigenous employment/industrial companies. As such, projected growth in this area is based primarily on company expansion. The socio economic review of the Knockmore/Lissue area has identified a range of Small/Medium Enterprises (SMEs) across, but not limited to, the following sectors:

- General and Light engineering;
- Digital media/ICT;
- Chemicals;
- Advanced engineering; and
- Warehouse and Distribution.

54 existing businesses across these 5 sectors have been identified within the Knockmore/Lissue area. Table 5 provides an estimate of the number of employees per company, and an approved sectoral growth rate is used to forecast future employment growth for each of the 5 sectors over the next 4 years. Finally, employment density analysis is used to translate employment growth into emerging property need.

Sector	No. of Companies in sector	Average No. of employees	Average Growth Rate in employees over 4 year period	Future No. of Employees	Additional Staff	Property Needs over the next Four Years
General & Light Engineering	22	55	3% per annum	1,361	151	9,060 sq m
Digital Media/ICT	6	50	2% per annum	325	25	1,175sq m
Chemicals	2	50	3.1% per annum	113	13	780 sq m
Advanced Engineering	2	225	3.1% per annum	508	58	2,726 sq m
Warehouse and Distribution	22	50	2.1% per annum	1,195	95	10,735 sq m
Total	54	n/a	n/a	3,502	342	24,476 sq m or 4.8ha

Table 5: Existing sectors, average growth, future employees and future property requirements.

In summary, the total number of new jobs from existing/indigenous companies is anticipated to be 342 within four years. This translates into a demand for 4.8ha of additional business space in the Knockmore/Lissue Zone over this timeframe.

On the basis of the 3 scenarios described previously, table 6 provides an overview of projected job creation and property need over the full plan period (i.e. 20 years).

Scenario 1		Scenario 2		Scenario 3	
Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)
2148 (created or sustained)	28.8ha	1267 (created or sustained)	16.8ha	3766 (created or sustained)	50.4ha

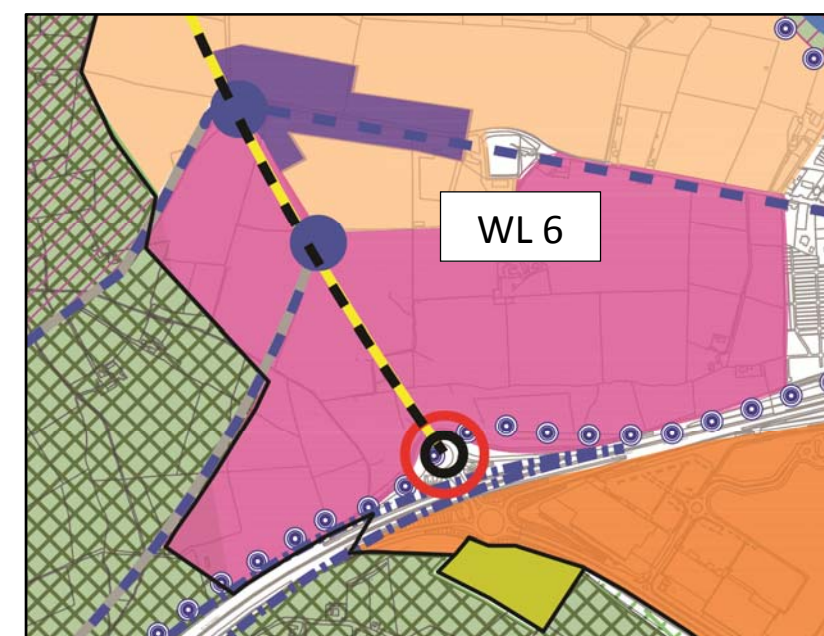
Table 6: Projected 20 year job creation and property need (Knockmore/Lissue)

In total, the Knockmore/Lissue lands has the potential to create or sustain 3,766 jobs over the 20 year plan period (based on growth Scenario 3), which would require 50.4ha of land.

In addition to the above, a further 15ha has been included at Knockmore/Lissue for inward investment. The potential job creation through inward investment over the 20-year plan period is estimated to be an additional 1,155. The overall land requirement for future employment development is 65.4ha with an overall job creation potential at Knockmore/Lissue of 4,921.

Zoning WL6 – Employment Land at Blaris

The Blaris Masterplan identified 58 hectares of land to the south of Blaris Road for industrial and commercial development. This provision has been replicated in this Development Framework and will include the relocation of existing S&D businesses from Culcavy, general growth within the transport and distribution sector and a 10ha land reserve.



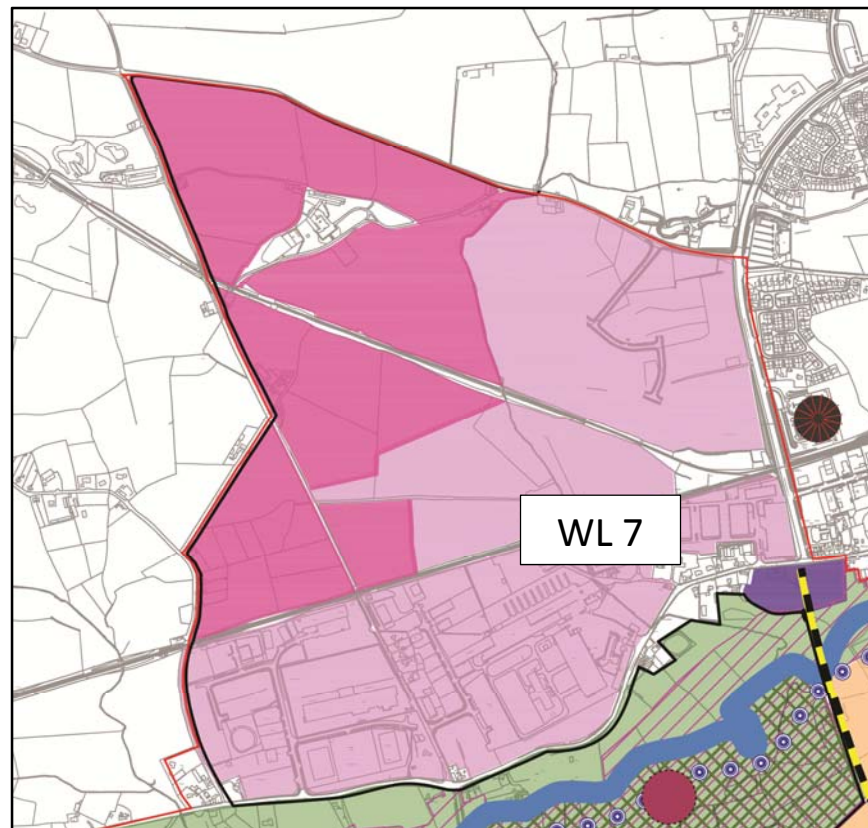
The following summarises the development principles are in addition to the detailed design and layout guidance for the employment zoning as set out in the Blaris Masterplan.

Development Principles

- Suitable land uses will include classes B1a, b and c (i.e. office, call centre, R&D), B2 (light industry) and B4 (storage and distribution) and car showrooms;
- Development consisting of use classes B1a, b and c will be located to the portion of the zoning to the west of the Knockmore Link Road, with use classes B2 and B4 located to lands to the east of the Knockmore Link Road;
- The portion to the south of the zone along the M1 is to have a high profile frontage with gateway buildings at the M1-Knockmore Link Road junction;
- Small footprint uses (i.e. office scale) are to be located on the edges of the zone and adjacent to the housing.
- The cumulative effect of development of this zoning along with WL10 should be considered at an early stage.
- Pedestrian and Cycle routes should be incorporated into all new road infrastructure and complemented by extensive amenity routes through the public open spaces;
- High quality bus corridors with regular services into and around Lisburn should be provided, linking to the City Centre and the bus and rail stations;
- Blaris Road is required to be widened to accommodate a single lane in each direction with right hand turn lanes.

Zoning WL7 – Existing employment Land at Knockmore/Lissue

A total of 117ha was zoned for employment uses in BMAP, of which 103ha has been developed, leaving 14ha still available for development. The development of this 14ha will help, in part, to meet the 20-year demand for employment land at Knockmore/Lissue (i.e. a requirement for 65.4ha).

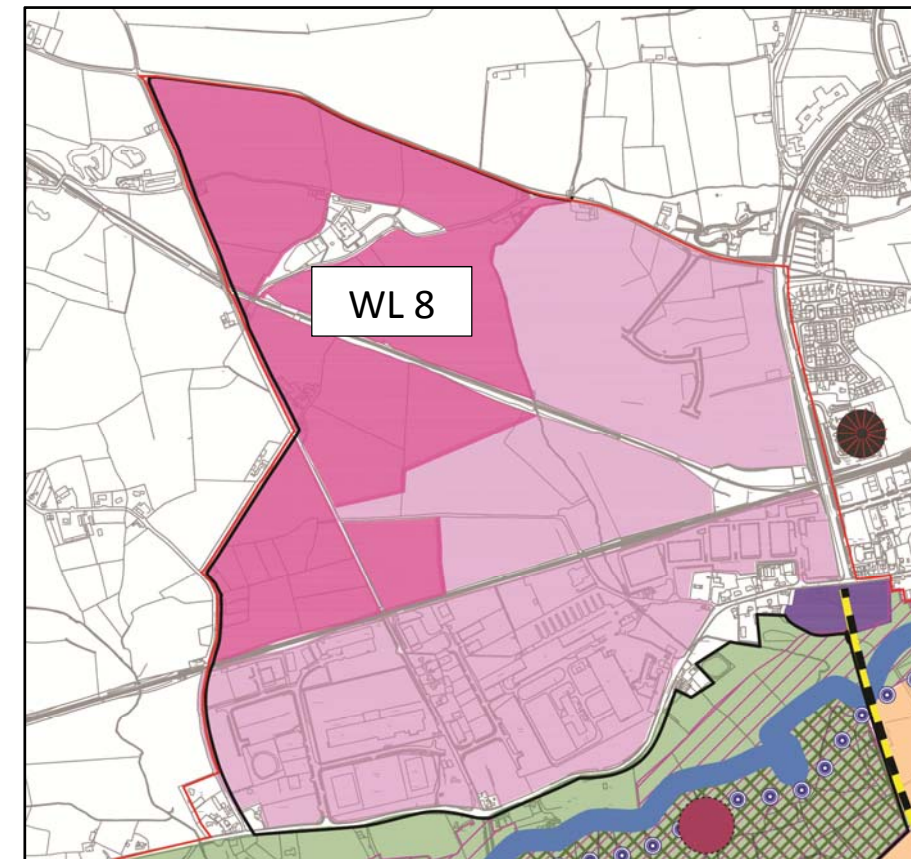


Development Principles

- Development proposals in this zoning should consist of complementary and/or similar uses to those businesses currently operating at Knockmore/Lissue; such as light industrial (use class B2) and general industrial (use class B3) ;
- The potential impact upon existing road networks, infrastructure and nearby road junctions should be carefully considered as part of any future development proposals. A Transport Impact Assessment may be required to consider whether infrastructure improvements are required;
- The development of this zoning should precede any new development in zoning WL8, in order to ensure the orderly development of land in this area and to take advance of the existing infrastructure and business clusters in the zoning.

Zoning WL8 – Future employment Land at Knockmore/Lissue

This designation will allow for the expansion of existing, indigenous employment sectors uses and also associated business growth. It makes up the additional 51.4ha of required lands to meet the 20-year projected demand in the Knockmore/Lissue area.



Development Principles

- Any development in this zoning should only be considered once all the existing zoned employment land has been exhausted in zoning WL7;
- It is envisaged that development-types in this zoning will to respond to the prevailing market demands at the time of development. However, as an indication, potential uses could include those uses as detailed in WL7 and also Research & Development uses;

- *Potential impacts upon the road network and associated improvements (if required) should be considered as part of any future development proposal in this zoning;*
- *Development proposals close to the retained Lissue House should be carefully designed, with strong landscape buffers provided to common boundaries to reduce any visual impact upon Lissue House;*
- *Smaller scale developments will be more appropriate on sites directly abutting this listed building (i.e. no more than 2 storeys in height) and only sympathetic uses (such as Light Industrial or Research & Development uses) will be acceptable on sites that directly abut Lissue House.*
- *A Transport Assessment will need to be undertaken and agreed with Transport NI. This shall agree any necessary improvements to the road and public transport network and any other transportation measures required to facilitate the development such as walking and cycling;*
- *Specific access arrangements for this zone will be required to be developed at a later stage, as well as an internal highway network. However, access arrangements will be required to be designed to an appropriate standard;*
- *Any necessary improvements to the highway network outside the immediate zone will also be required to be considered in order to facilitate the development;*
- *An initial assessment of the possible zone specific improvements that may be required are as follows:*
 - *Improvements to Ballymacash Road : and*
 - *Improvements to Ballymacash Road/Prince William Road junction*

It is envisaged that development at this zoning will not proceed until the first phase of the Knockmore Link road has been completed.

4.4 MAZE LONG KESH

Objective 4 – Promote and encourage appropriate development at the Maze Long Kesh site to reflect its status as a ‘Strategic Land Reserve of Regional Importance’

a. Economic/Employment Development

The Royal Ulster Agricultural Society (RUAS) has already established its new showgrounds and headquarters at Maze Long Kesh and there is the potential to attract new and associated economic and employment uses to the site to create a ‘cluster’ of complementary uses. For example, this could include a food & drink sector and/or an agri-food sector. The College of Agriculture, Food & Rural Enterprise (CAFRE) is presently undertaking a review of incubation/wider property support for the agri-food sector in Northern Ireland with the possible implication of developing a new agri-food park in an, as yet, unspecified location. The Agri-food and Biosciences Institute (AFBI) are also considering a new facility for Northern Ireland. The Maze Long Kesh site provides an opportunity to develop post incubation property supports for the agri-food sector and designation of at least part of the site as an Enterprise Zone could be the suitable vehicle to deliver such a use.

Enterprise Zones are beneficial for the following reasons:

- they can include business rates relief over a specified timeframe
- development proposals go through a simplified planning process
- they encourage the clustering of related businesses, thus boosting the local supply chain
- they usually include improved business infrastructure (e.g. super-fast broadband/road network etc.), which are attractors to major employers.

Considering the size of Maze Long Kesh, the opportunity exists to have a number of Enterprise Zones that could relate to a range of employment sectors and as such it is the policy of Lisburn City Council to encourage and support the designation of Enterprise Zones on the site.

Any Enterprise Zones should be sectoral focused and of a targeted size to ensure functionality. Based on comparisons with UK Enterprise Zones (such as Perth Food & Drink Enterprise Zone), the following example sets parameters for potential future Enterprise Zones at Maze Long Kesh, using agri-food as an example sector:

- Optimum operational area of 6.5 ha;
- Within the zones, there is usually c. 1,400 sqm of advanced industrial floor space finished and fitted for processing and preparation uses, which will be aimed at those companies coming out of the incubator stage; and
- There will be up to 10 serviced development plots ranging from 0.4ha to 1.2ha for developments in support of the sector.

Based on this model, the total employment at a Food and Drink Enterprise Zone would be expected to be 1,900 when complete (excluding construction jobs).

It is important to note that the above is one example of sector which could benefit from Enterprise Zone status at Maze Long Kesh and there will be no restrictions on the sectors that could be accommodated thereon. Enterprise Zones for a range of other sectors will be based on a range of factors, such as historic employment sectors in Lisburn, the specific and/or unique location of Maze Long Kesh and the potential to ‘cluster’ similar sectors. Identified potential sectors suitable for location at Maze Long Kesh include (but are not limited to):

- Life sciences (i.e. biotechnology, medical and pharmaceutical companies);
- High Technology;
- Aerospace and defence; and
- Creative Industries.

Table 7 sets out the projected plan period job creation and associated property need for Maze Long Kesh. The three growth scenarios as detailed in section 3.3 have been used.

Scenario 1		Scenario 2		Scenario 3	
Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)	Add. jobs created (20 yrs.)	Projected Property need (20 yrs.)
2608 (created)	34.8ha	2227 (created)	29.6ha	3408 (created)	45.6ha

Table 7: Projected 20 year job creation and property need (Maze Long Kesh)

Whilst not all of the site will be used for employment uses, it is envisaged that major new business and employment uses can locate at Maze Long Kesh and will be encouraged through the use of (sectoral specific) Enterprise Zones. In total, economic development within the Maze Long Kesh lands has the potential to create 3,408 jobs over the 20 year plan period (based on growth scenario 3), which would require 45.6ha. The Socio-Economic report in Appendix 3 provides further detail and tabled results.

b. Other development types

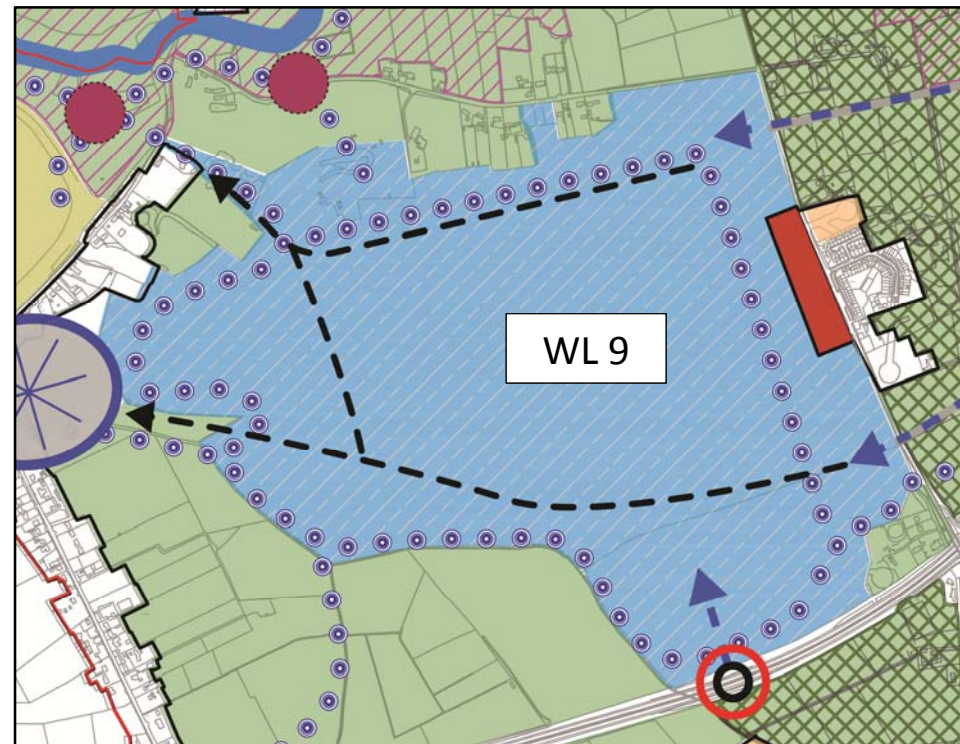
The relocation of the Royal Ulster Agricultural Society onto the Maze Long Kesh lands and the annual Balmoral Show being held at Maze Long Kesh demonstrates the potential for use of part of the Maze Long Kesh lands for large-scale recreation/tourism uses. As such, any proposal that includes leisure and/or tourism development related to existing assets on site will be favourably considered. Such proposals should not adversely affect the existing historical assets on site.

Other potential development types on site could include ancillary or supporting developments for the main economic/employment uses and/or the leisure/tourism developments. These could include specialist educational and/or Research & Development facilities to support specific uses or activities in Enterprise Zones. The location of such facilities on the same site as the main centres of employment means that sectoral hubs can be created at Maze Long Kesh that caters for training through to full employment and economic activity.

In addition, significant leisure and/or tourism developments could require supporting development such as retailing, restaurants, hotel etc. Such mixed-uses could service the entire Maze Long Kesh site and be sited to facilitate ease of access by all site users.

Zoning WL9 – Maze Long Kesh is zoned as a ‘Strategic Land Reserve of Regional Importance’

The Maze Long Kesh site is approximately 138 hectares and has been previously zoned as a ‘Strategic Land Reserve of Regional Importance’. The WLDF will continue this zoning to help promote a range of regionally significant development types on the site appropriate to its unique location and existing assets. This zoning plays a key role in the future development of the West Lisburn area.



Development Principles

- A range of land uses will be acceptable on site, focused on unique economic/employment uses that could be delivered through the formation of Enterprise Zone(s);
- Tourism and leisure uses will be encouraged close to features of historic interest that are present on site; and
- Complementary and/or ancillary uses that support the key economic/employment and tourism/leisure uses will also be encouraged in appropriate locations.
- Internal circular route surrounding MLK site for walking and cycling will be encouraged, with external connections to the River Lagan, Halftown and the Knockmore Link Road;
- A high quality bus corridor should be considered to link the Maze Long Kesh site to the new park & ride and also the train halt; taking advantage of the Knockmore Link Road, M1 and A1 connections;
- A new direct access from the M1 (east-bound) directly into the Maze Long Kesh site should be delivered;
- A new direct access road from the Knockmore Link Road should be developed to facilitate better linkages with the wider Lisburn area.

4.5 HOUSING AND SETTLEMENTS

Objective 5 – Encourage the development of new residential development to support growth in the area, whilst respecting existing settlements

There are two factors to consider when projecting future housing need in the West Lisburn area over the plan period:

1. Demand for housing close to employment locations; and
2. Natural population increase.

Demand for housing close to employment locations

Opportunities for significant residential development are provided in this plan for potential future employees, in order to sustain the projected growth in employment uses over the 20-year plan period.

Whilst not all potential residents will be employed in existing or future businesses in the West Lisburn area, it is envisaged that c. 40% of new employees will reside within 5 miles of the identified employment designations¹. On this basis, there is the potential that the 3,617 new employees created due to economic growth over the 20 year plan period will seek to live in the West Lisburn area (based on scenario 3 growth).

Based on an average household size of 2.52 (as per the 2011 Census), there will be a need for 1,435 new dwellings in the West Lisburn area in the next 20 years solely as a result of job creation in the area.

Natural population increase

In addition to the above, there will be natural growth within each of the wards in West Lisburn and based on the current growth projections of 9.7% (Source – NISRA), each ward will grow as follows over the next 10 years:

- Blaris – additional 327 people;
- Knockmore – additional 416 people; and
- Maze – additional 369 people.

The above figures, that show an increase in population over the next 10 years, are based on an ‘above average’ growth rate following analysis from the 2011 Census. It is difficult to project population growth for the following decade, which is required for the 20-year plan period. As such, the Northern Ireland average growth rate of 5.7% has been used for each ward for the period 2025 to 2035. Therefore, the overall level of natural population growth over the 20-year plan period for each ward is as follows:

- Blaris – an additional 538 people;
- Knockmore – an additional 685 people; and
- Maze – an additional 607 people.

Overall, the natural growth within the study area over the next 20 years is projected to result in a further 1,830 residents. Based on an average household size of 2.52 (based on the 2011 Census), this results in the need for 726 dwellings.

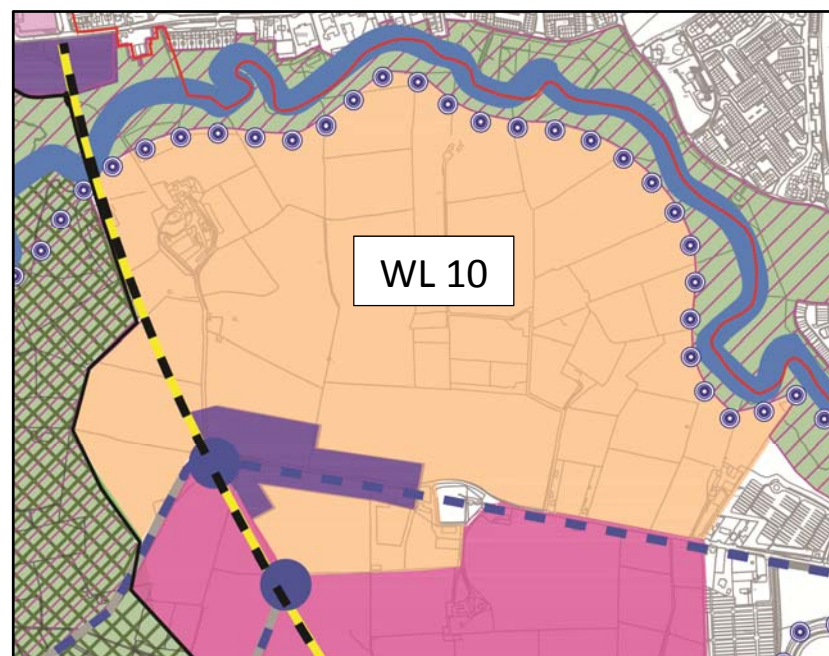
When combined with the demand for housing close to new centres of employment, the West Lisburn area could see the need for up to 2,161 additional dwellings.

Any new residential development will be accommodated in extensions to existing settlements within the study area. The majority of new housing in the area will be directed towards the Blaris lands, which will form a natural urban extension to Lisburn city. A generous supply of residential land has been identified here, to allow for adequate growth over the 20-year plan period. As such, any shortfall in housing land supply up to and beyond the plan period can be met at Blaris without the need for future development extending beyond the proposed settlement limit.

There is also scope to expand to the north of Culcavy, following the relocation of existing S&D uses to Blaris and to the north of Halftown for around 28 social housing units. In all cases the plan proposes adjustments to the existing settlement limits to accommodate this proposed growth.

Lurganure, Long Kesh and Kesh Bridge are all well-established residential areas with well-defined boundaries and limited opportunities for growth. As such, no expansion of existing settlement limits is planned for these settlements and future development should be located within the existing built up area while respecting established densities and character.

¹ Based on current methods of travel to work, as per 2011 Census. Walking, cycling and short-distance public transport accounts for c.40% of all travel to work modes.



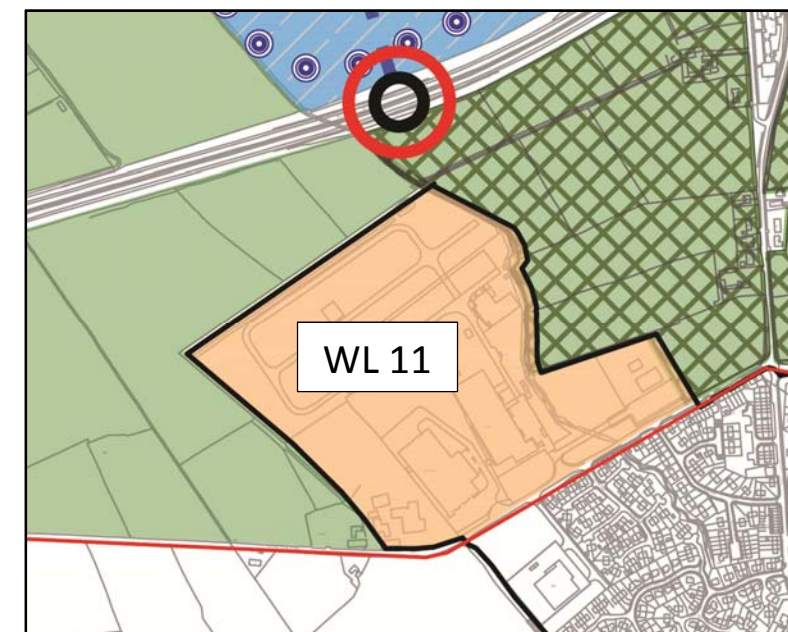
Zoning WL10 – Housing Land at Blaris

The Blaris Development Framework sets the context for this zoning, the vision for which was to “create a very high quality, sustainable and integrated expansion of Lisburn that will provide major benefits to the city as a whole”.

The Blaris Development Framework identified approximately 80 hectares of land to the north of Blaris Road as being suitable for residential development. The following development principles are provided in addition to the detailed account of densities, building heights, linkages, landscaping and open space found in that plan.

Development Principles

- Residential types in mixed use areas should include townhouses and apartments;
- Residential densities are generally medium/ high (30-40 units per hectare) close to the neighbourhood centre and decreasing to low in the eastern portion of the zone (medium density (25-30 units per hectare) in the middle of the zone and along Blaris Road and low density (15-20 units per hectare) in the eastern portion;
- Higher densities (40-50 units per hectare) are recommended within the neighbourhood centre and the mixed use areas;
- The neighbourhood centre should be the location for small scale convenience retailing only
- The masterplan estimates a potential residential yield of around 2200-2900 dwellings.
- The cumulative effect of development of this zoning along with WL6 should be considered at an early stage
- Pedestrian and Cycle routes should be incorporated into all new road infrastructure and complemented by extensive amenity routes through the public open spaces;
- high quality bus corridors with regular services into and around Lisburn should be provided, linking to the City Centre and the bus and rail stations;
- Blaris Road is required to be widened to accommodate a single lane in each direction with right hand turn lanes.

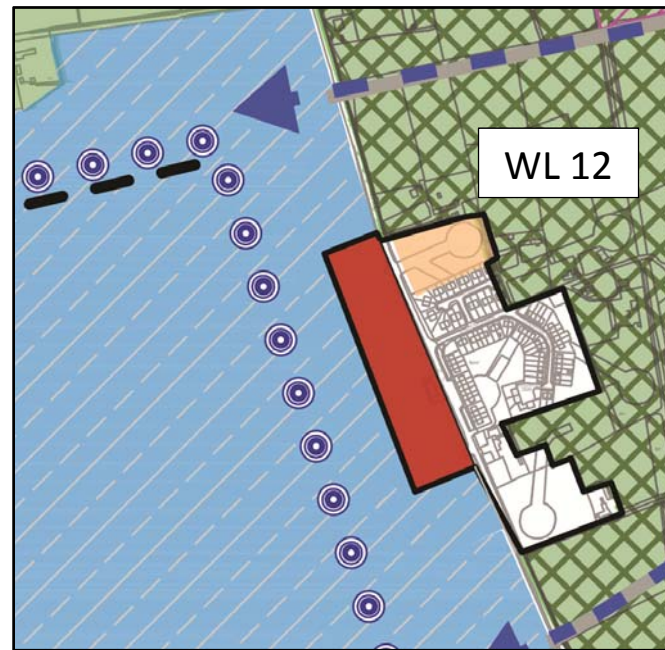


Zoning WL11 – Housing Land at Culcavy

A total of 18ha have been zoned for residential development on lands currently occupied by storage and distribution uses at Aghnatrisk Road. The WLDF proposes to relocate the existing uses on this land to zoning WL6. Based on an average density of 15 dwellings/hectare, which is widely recognised as a low housing density, this designation could deliver 270 housing units.

Development Principles

- Residential development should include typical ‘edge of settlement’ development, with a relatively low density (i.e. 15 units/hectare);
- The need for junction upgrades at Aghnatrisk Road, Culcavy Road and Harry’s Road should be considered as part of a comprehensive masterplan for the entire zoning;
- Buffer planting should be provided to the north, east and west boundaries of the site to effectively enclose development and protect the surrounding countryside landscape.
- A Transport Assessment will need to be undertaken and agreed with Transport NI. This shall include any necessary improvements to the road and public transport network and any other transportation measures required to facilitate the development such as walking and cycling;
- Specific access arrangement for this specific zone will be required to be developed at later stage, as well as an internal highway network. However, access arrangements will be required to be designed to an appropriate standard;
- Any necessary improvements to the highway network outside the immediate zone will also be required to be considered in order to facilitate the development;
- An initial assessment of the possible zone specific improvements that may be required are as follows:
 - Improvements to Aghnatrisk Road ; and
 - Improvements to Aghnatrisk Road/Culcavy Road junction



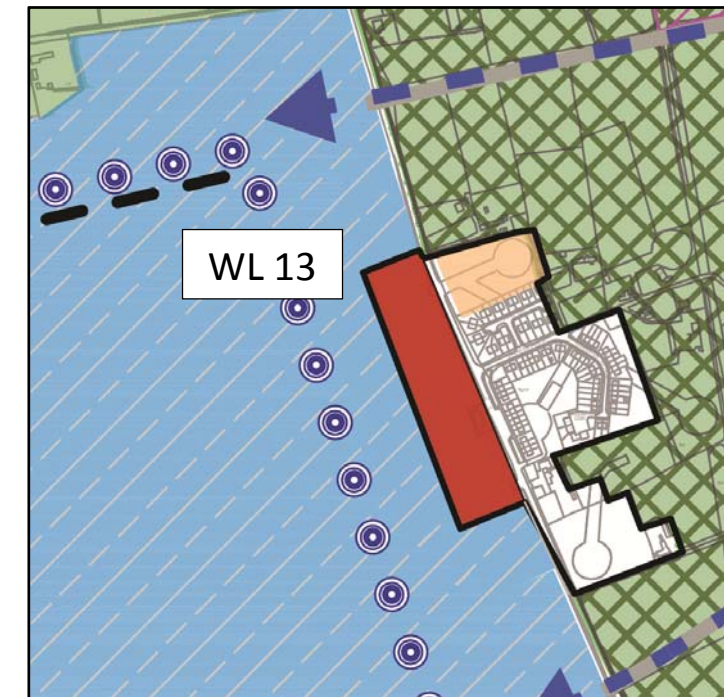
Zoning WL12 – Housing Land at Halftown

There is a locally identified requirement for additional residential land of c.0.8 hectare for social housing. Based on the existing density in the settlement (c.35 dwellings/hectare), this site has a yield of approximately 28 units.

Development Principles

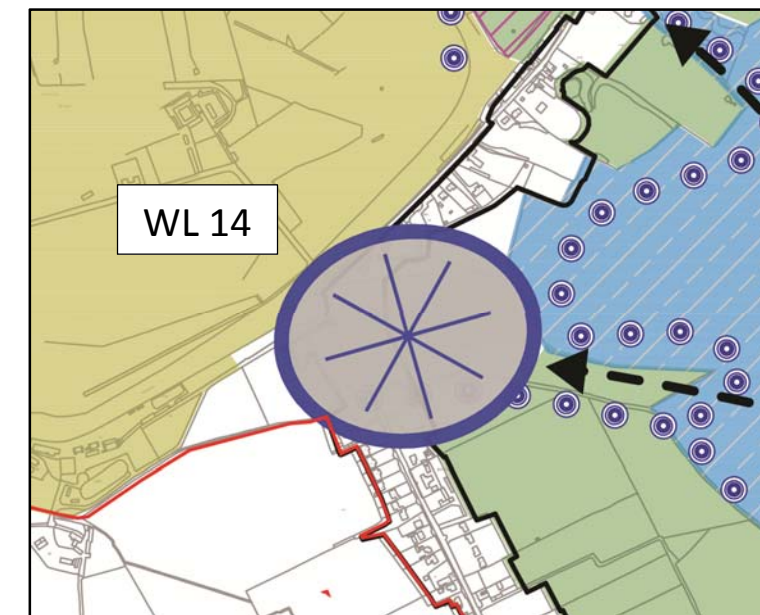
- Any new development should be appropriately enclosed with landscaping to the north and east boundaries in order to retain the rural character of Halftown and replicate existing density in Halftown.

The overall potential yield from the designated housing land is between 2,498 and 3,198 residential units. Based on the projected population growth scenarios, this represents a potential over-supply of housing land requirements for the plan period. However, some built-in flexibility is required to allow for greater than expected population growth and greater demand once centres of employment are development across the study area.



Zoning WL13 – Halftown Community Zone

The Maze Long Kesh Spatial Framework identified a community zone of around 4 hectares on the western side of Halftown Road for improved leisure/recreational uses to complement the existing Halftown community facilities, and potentially a small scale workshop space for local businesses. The Maze Long Kesh Spatial Framework states that the MLK Development Corporation will bring forward more detailed plans for this zone in consultation with the local community and key stakeholders.



Designation WL14 – Settlement Development Node

At the northern end of Long Kesh village the Kesh Road, Dunnygarton Road and Gravelhill Road converge at the entrance to Down Royal Race Course and the adjacent pub/ restaurant. In a linear settlement such

as Long Kesh which lacks a nucleus, this junction provides a very natural meeting point and has the potential to be a development node/ village centre.

In addition, it is at this point that Down Royal Race Course is at its closest to the Maze Long Kesh site and with the current poor access to the Race Course from the major road network, the development of Maze Long Kesh creates a potential opportunity for a vehicular and pedestrian/ cycle link to be created through the site and on to the Race Course.

The plan has designated this location as a Settlement Development Node in order to highlight its importance locally and the potential to not only further enhance it as a village centre, but also to help create better links for the Race Course as one of the most important leisure/ tourism assets in the sub-region.

It is not within the remit of the WLDF to consider the detail necessary that would allow this development to happen, it is simply highlighted for now with the recommendation that further detailed studies should be undertaken with a view to achieving the objectives of connecting the Race Course with Maze Long Kesh and the major road network and providing a village heart for Long Kesh.

4.6 NATURAL ENVIRONMENT

Objective 6 – To protect and enhance significant and valuable landscape areas and waterways

The vision for the Natural Environment within the study area is to promote its use, where appropriate, for recreational activities, while maintaining and protecting the existing high quality areas of countryside.

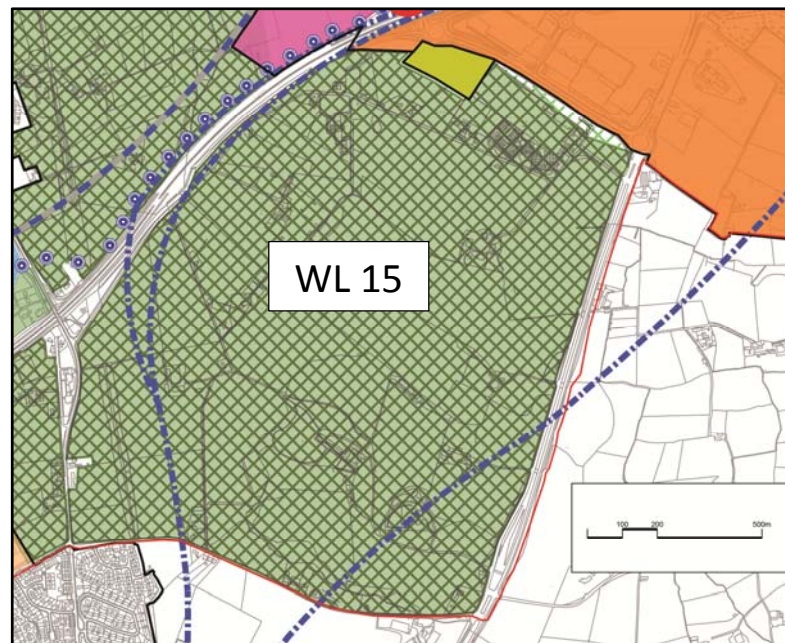
The plan therefore affords protection to the River Lagan Corridor and its floodplain from inappropriate development, while encouraging controlled access for recreational activities.

As well as its aesthetic appeal and practical use for recreational activities, the natural environment can also act as a buffer between built up or developed areas, providing some natural relief to settlements.

The good quality agricultural and natural environment land within the plan area can be retained in places to act as a natural barrier between existing and/or proposed development areas. It is important that any new areas of development do not coalesce and result in urban sprawl across what is currently a countryside location.

Designation WL15 – Rural Landscape Wedge

Rural landscape wedges consist of buffer landscapes and areas that distinguish and maintain the separate identities of settlements; prevent the merging of the component parts of the plan area; provide an important element in defining and protecting the setting of settlements and maintain the rural character of the countryside.



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

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

Planning permission will be granted for development proposals that are compliant with prevailing regional planning policy and which maintain the visual separation between settlements.

Designation WL16 – Local Landscape Policy Areas

The WLDF designates the following Local Landscape Policy Areas (LLPA). Small-scale, sympathetic development will only be permitted within these zones that respect the key features of each LLPA. Boundaries of these designations can be viewed on the map in figure 6. The key features of each LLPA are as follows:

- River Lagan and Down Royal LLPA**
 - Area of local nature conservation interest - River landscape and associated vegetation;
 - Deciduous tree groups;
 - Area of local amenity importance – The Down Royal Race Course and the Down Royal Golf Course.
- Lissie House LLPA**
 - Listed building and its surroundings – Lissie House and its setting;
 - Area of local nature conservation interest - belts of mature trees, which provide landscape edge definition to the western extension of the Lisburn urban area.
- Rathdown, Moira Road LLPA**
 - Archaeological sites and monuments and their surroundings – Rath & Burial Mounds;
 - Area of local nature conservation interest - Mature oak trees.

WEST LISBURN DEVELOPMENT FRAMEWORK LLPA MAP

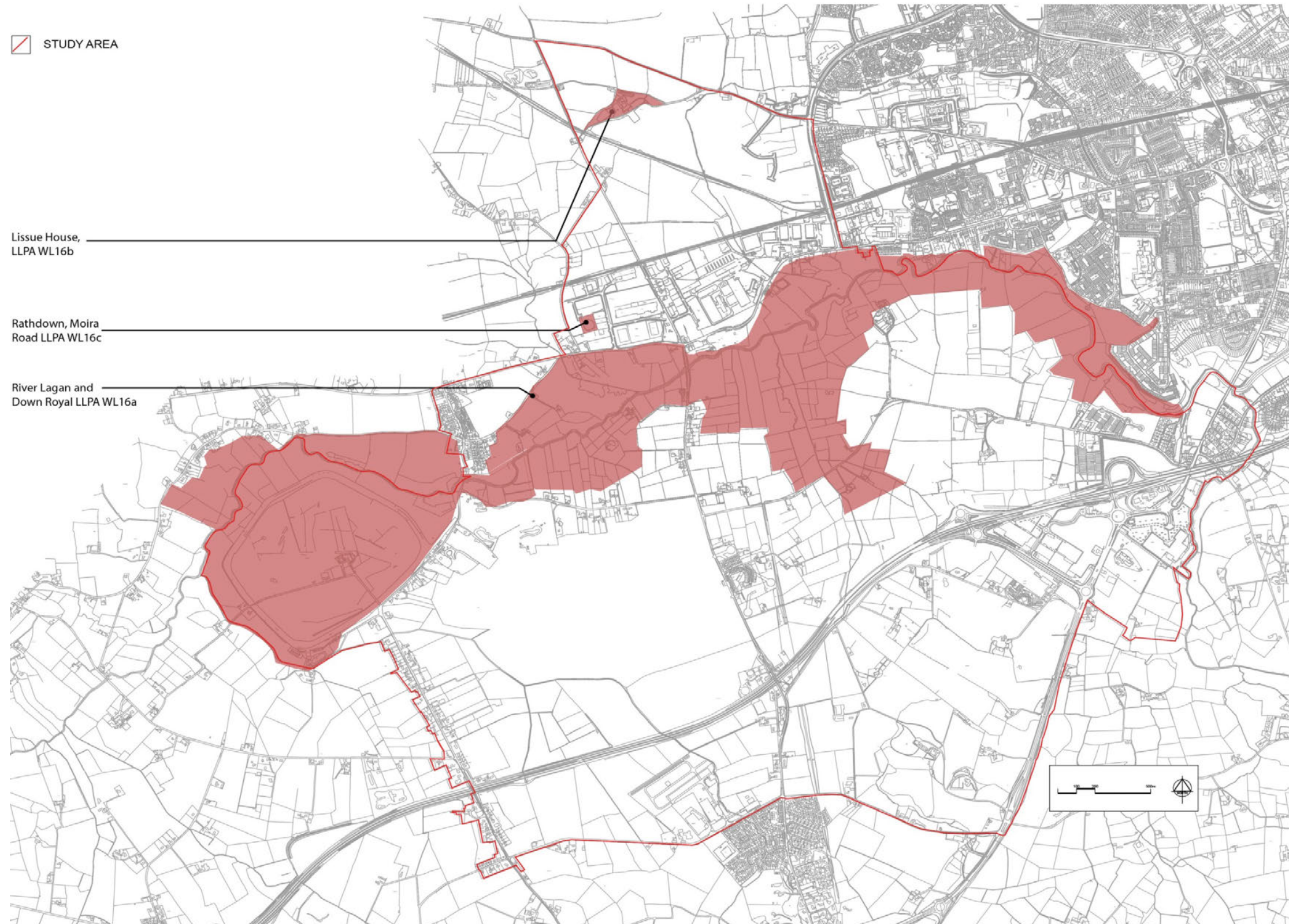


Figure 7 – LLPA designations within study area

4.7 RETAIL

Objective 7 – Enhance the ‘Regional Significance’ of Sprucefield and expand its retailing role

Sprucefield is the primary retail focus for West Lisburn with a current gross retail floorspace of around 47,800 m² supported by 1,500 free car parking spaces. A radio broadcast site of c. 5.5ha is also contained within the Sprucefield boundary, which may become available for redevelopment during the plan period.

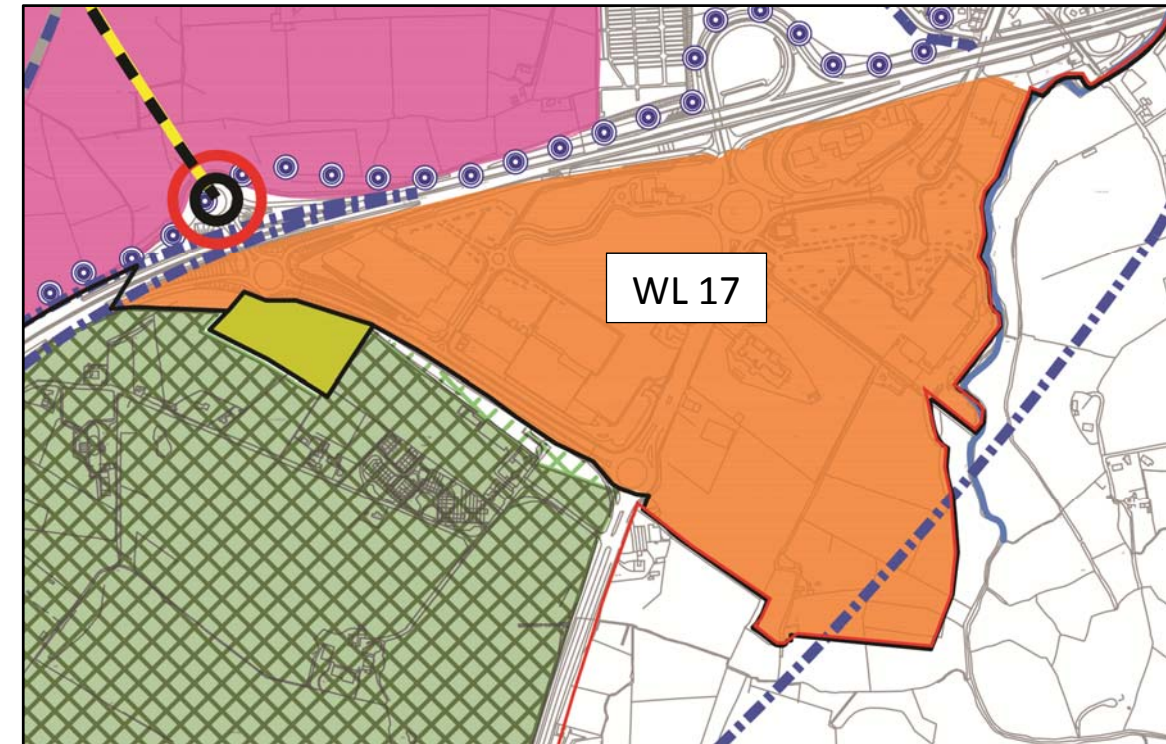
Sprucefield occupies a unique geographical location, at the centre of the main north-south and east-west transport corridors, and serves a wide catchment area. Indeed, the Regional Development Strategy 2035 identifies the location of Sprucefield as being within the cross-border Economic Corridor (Key Transport Corridor), as per the Regional Strategic Transport Network.

It is within this context that the RDS designates Sprucefield as one of three Regional Shopping Centres (RSCs) within Northern Ireland (the others being Belfast and Londonderry), stating:

“Sprucefield will continue to retain its status as a regional out-of-town shopping centre.”

While the role which each RCS plays in terms of retail provision is not defined anywhere in planning policy, it is widely recognised that all new regionally significant retail investment and development should be directed, in the first instance, to the RSCs.

Despite its designation as a RSC, the PAC report into Draft BMAP recognised that Sprucefield was not performing to its full potential as a RSC and was not benefiting from regionally significant retail developments. The PAC also noted that the development of more bulky goods or retail warehousing would not enhance Sprucefield as a regional centre. Given the unique location of Sprucefield and its current underperformance as a RSC, measures are required to improve its performance and expand the retail offer.



Zoning WL17 – Sprucefield Regional Shopping Centre

Regionally significant retail developments are encouraged at Sprucefield in support of its regional role as set out in the RDS 2035. A comprehensive masterplan should be prepared for new development schemes. Enhancement of transport infrastructure, including public transport improvements, will form part of any future development proposal.

The 5.5ha radio broadcast site and surrounding lands are recognised as a ‘development opportunity site’ within zoning WL17. This site should be developed for either retail and/or complementary uses (i.e. services, café, restaurant, leisure etc.).

4.8 SPORT, RECREATION AND LEISURE

Objective 8 – Increase sport, recreation and leisure activity in the West Lisburn area, with a focus on the River Lagan corridor

Leisure, recreation and sport are important social and economic activities for a city and can generate a wide range of opportunities for business and employment opportunities for residents. Attractions such as museums and visitor/information centres, in addition to leisure developments such as sport complexes, can draw significant numbers of people into an area.

The West Lisburn area has a great natural resource in the River Lagan corridor that could be utilised for a range of sport, recreation and leisure uses; especially those associated with water sports and outdoor recreation activities. At the same time, the quality of this resource must be protected to ensure it is a desirable place to spend recreational time.

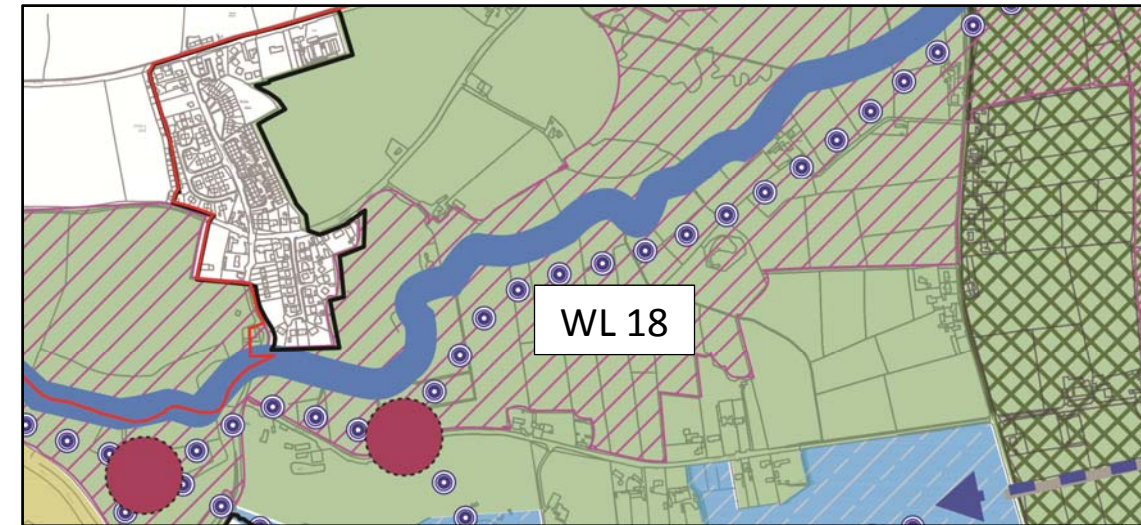
Currently, the river is relatively inaccessible to the existing local population and greater connectivity should be provided to and by this resource. The need for greater connectivity to and along the river corridor will be strengthened when growth in the area (both in terms of jobs and residential population) occurs. As such, it is proposed to develop pedestrian and cycle links from the river corridor to existing nearby residential areas whilst also ensuring that future development proposals also provide connections to the river corridor.

With this greater level of connectivity, the development of a walkway/cycleway along the river corridor will enhance the opportunity for recreation and leisure activities along the riverfront. This route will extend the current cycleway network in the city and surrounding area and link the city with the West Lisburn area and beyond.

The proposed riverside walkway/cycleway also provides an alternative link to existing leisure facilities in the West Lisburn area, such as the Down Royal Racecourse. This plan proposes to protect this important recreation facility and encourage its development to have a more integrated role with existing communities.

The opening up of the river corridor will also provide the opportunity for active water-based recreational uses. The Lagan Canal Trust are developing the potential to reopen the river as a navigational waterway and potential berthing nodes and slipways have been identified that could support river navigation. One such location is the Union Locks. Provision has been made in the plan to develop a water sports facility, at a suitable location along the river. Interest was expressed at the consultation stage for such a provision and could be developed as a major recreation attraction.

The Maze Long Kesh lands contain a rich resource of historical features that could be developed and promoted as tourism assets. The reuse of historical features such as the World War II runways and scheduled World War II hangars provide the opportunity to promote tourism activity on site.



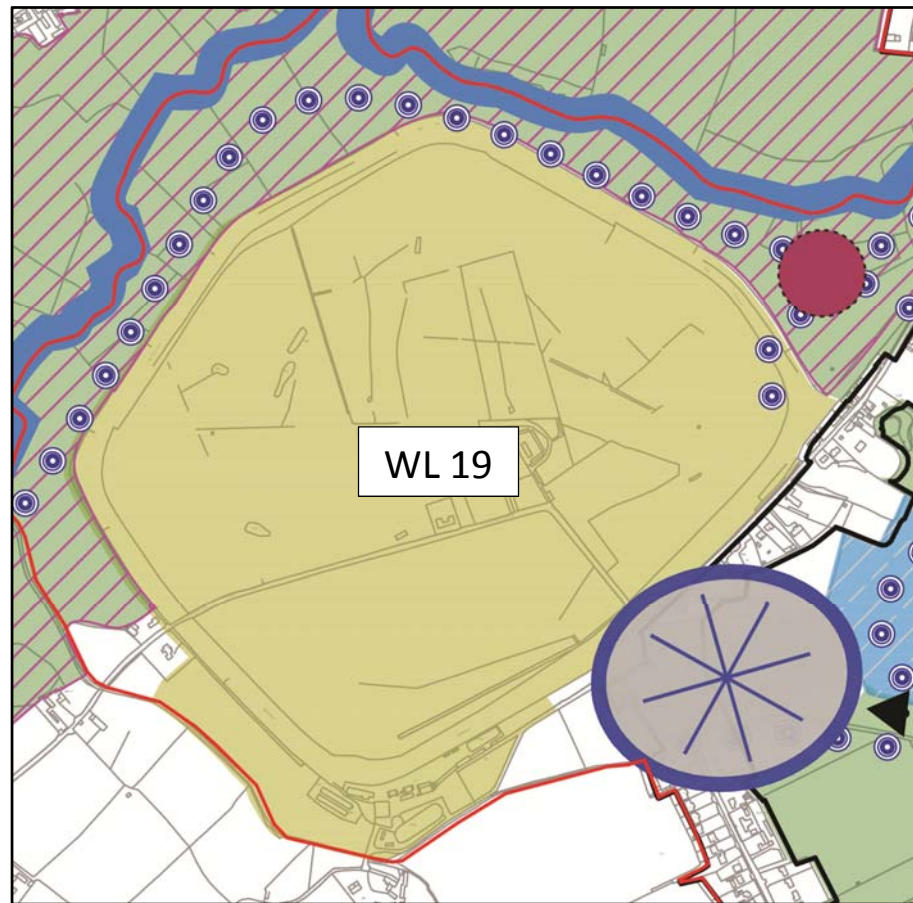
Zoning WL18 – The River Lagan Corridor will be designated as an extension to the Lagan Valley Regional Park.

The Lagan Valley Regional Park (LVRP) currently terminates at the edge of Lisburn development settlement limit. It is proposed that this designation extends the Lagan Valley regional Park along the river corridor.

Development within the LVRP will only be allowed where the proposal is for a use appropriate to the character of the LVRP. Development proposals should conserve or enhance the landscape quality or features. A series of potential development nodes along the river Lagan have been identified that could accommodate appropriate development for water-based activities, such as berthing provisions and slipways. A water sport centre could be developed at one of these development nodes, to take advantage of the floodplain area. Each node should be linked by the riverside walkway/cycleway.

All development proposals should be appropriate in scale and form for each location and will not adversely affect the natural value of that location and include the following:

- a. Recreation/tourism development around Union Lock;
- b. Water sports centre;
- c. Marina; and
- d. Potential alternative and/or additional marina/berthing point.



Zoning WL19 – Down Royal Racecourse recognised as a major recreational asset

Down Royal Racecourse and associated golf course will be protected as a major recreational asset for the area and region. Improved links to service this asset are to be explored and developed, along with the potential to integrate this asset better with the local communities and the nearby Maze Long Kesh site.

5.0 ACTION AND PHASING PLAN

5.1 ACTION PLAN

In order to deliver the objectives of the WLDF (as set out in section 2.0), a series of actions have been identified and formulated into an action plan. This plan details what actions are required to deliver the plan objectives, who the lead authority or body responsible for delivery of that action area and who the supporting or partnering bodies are likely to be. The action plan also identifies potential revenue streams to fund each action and the importance of each action in terms of delivering each objective.

Finally, an indicative timeframe for the completion of each action is also provided and divided into the following broad timeframes, based on the WLDF being a 20 year plan:

- Short-term: 1-7 years;
- Medium-term: 8-14 years; and
- Long-term: 15+ years.

Considering the strategic nature of the WLDF and the lifespan of it (i.e. 20 years); it is not possible at this stage to provide definitive detail in relation to the specific revenue streams for each of the actions as included in the action plan. Furthermore, the timeframes provided in the action plan are indicative only and some actions may take longer to complete and some could be completed within a lesser or greater timeframe.

In this regard, the action plan is considered an 'organic road-map' for the WLDF and it is envisaged that the action plan will be updated and reviewed on a regular basis as actions are undertaken, completed or adjusted as objectives of the plan are met or amended. This action plan can be found on page 29.





5.2 REVIEW PERIOD

Over time, as the Action Plan is implemented and other external factors develop during the lifetime of the WLDF, it will be necessary to review the WLDF to respond and react to such changes in context and progress. As a 20-year plan, it is proposed that the Action Plan is reviewed every three years so that the listed actions can respond to and be updated to reflect changing circumstances and be updated and/or removed once the relevant action is completed.

The entire WLDF should be reviewed every 7 years and the Framework Objectives and Strategy reviewed and updated to ensure the WLDF remains a relevant document for social and economic progress in the Lisburn area. It is not envisaged that the Framework Vision will be reviewed and this should only be reconsidered in exceptional circumstances.

FRAMEWORK PLAN OBJECTIVE	PLAN ACTIVITY	LEAD RESPONSIBLE BODY	LEAD PARTNERS	POTENTIAL FUNDING SOURCES	TIMESCALE			IMPORTANCE
					short	medium	long	
1. Prioritise the development of the Knockmore Link Road as the key piece of infrastructure required to unlock the development potential of West Lisburn	(a) Engagement with central government, regional Departments and other stakeholders to secure agreement on funding and delivery.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> NI Executive; DRD; 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	✓			★★★
	(b) Undertake necessary further and detailed studies regarding provision of Knockmore Link, assemble the required lands and progress the construction of the Knockmore Link Road between the M1 and Knockmore Road.	<ul style="list-style-type: none"> DRD; NI Executive; Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council; Maze Long Kesh Dev. Corp.; Land owners/developers. 	<ul style="list-style-type: none"> Main source: DRD/NI Executive capital projects fund. Maze Long Kesh Dev. Corp. 	✓			★★★
2. To improve existing and develop new integrated multi-mode transport infrastructure into and throughout West Lisburn	(a) Undertake necessary further and detailed studies regarding the provision and delivery of West Lisburn train halt/park and ride facilities. Commence construction of this halt.	<ul style="list-style-type: none"> DRD; Translink. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> DRD/Translink capital projects fund. 		✓		★★★
	(b) Provide local distributor roads to connect key areas (i.e. Maze Long Kesh and Blaris) into the Knockmore Link Road.	<ul style="list-style-type: none"> DRD; Developers. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council; Maze Long Kesh Dev. Corp.; 	<ul style="list-style-type: none"> DRD capital projects fund; Maze Long Kesh Dev. Corp.; Developer contributions. 	✓			★★★
	(c) Provide direct access into Maze Long Kesh/West Lisburn from M1 (west-bound on/off slip).	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> DRD. 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp.; Support from DRD. 		✓		★★
	(d) Develop a network of pedestrian and cycle routes throughout study area and linkage to areas beyond West Lisburn, including along the river. <i>(Timescale varies dependent upon site specific issues)</i>	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Sustrans; CycleNI; Maze Long Kesh Dev. Corp.; Lagan Canal Trust; NITB. 	<ul style="list-style-type: none"> EU funding; Lisburn & Castlereagh Council; NITB. 	✓	✓	✓	★
3. To promote new and expansion of existing employment uses in the West Lisburn area	(a) Zone existing and proposed employment lands in future statutory Local Development Plans.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	None.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 		✓		★★
	(b) Improve infrastructure and physical connections in and around Knockmore/Lissue to allow connection to Knockmore Link, in order to facilitate growth and expansion in this area.	<ul style="list-style-type: none"> DRD. 	<ul style="list-style-type: none"> Local land owners/developers; Invest NI; Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Invest NI; DRD capital projects fund. 		✓		★★
	(c) Relocate existing storage and distribution operations from Culcavy to new location at Blaris (utilising new Knockmore Link Road and M1 junction).	<ul style="list-style-type: none"> Land owners/developers. 	<ul style="list-style-type: none"> Affected business. 	<ul style="list-style-type: none"> Land owners/developers. 		✓		★★

4. Promote and encourage appropriate development at the Maze Long Kesh site to reflect its status as a 'Strategic Land Reserve of Regional Importance'	(a) Zone Maze Long Kesh in future statutory Local Development Plans as a 'Strategic Land Reserve of Regional Importance' to reflect its 'regionally significant' status; including the potential for Enterprise Zones.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council 		✓		★★
	(b) Undertake further study to establish appropriate sectors to help inform designation, location and operation of Enterprise Zones at Maze Long Kesh.	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council; Invest NI. 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	✓			★★
	(c) Ensure sufficient infrastructure is in place to accommodate identified sectors and engage with appropriate government agency to produce strategy to attract investment.	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. 	<ul style="list-style-type: none"> Invest NI. 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp. Invest NI. 		✓		★★
5. Encourage the development of new residential development to support growth in the area, whilst respecting existing settlements	(a) Zone lands for residential development in future statutory Local Development Plan.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	None.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 		✓		★★
	(b) Provide necessary infrastructure and development sites to accommodate new housing construction at Blaris lands.	<ul style="list-style-type: none"> Land owners/developers. 	None.	<ul style="list-style-type: none"> Developer funded. 		✓		★★
	(c) Provide necessary infrastructure and road improvements (if required) to facilitate housing development at Culcavy (former storage & distribution lands).	<ul style="list-style-type: none"> Land owners/developers. 	None.	<ul style="list-style-type: none"> Developer funded. 			✓	★★
	(d) Deliver additional social housing at Halftown settlement.	<ul style="list-style-type: none"> DSD/Social Housing provider. 	<ul style="list-style-type: none"> Halftown Community Group 	<ul style="list-style-type: none"> DSD/Social Housing provider. 	✓			★
	(e) Undertake a further study to consider potential and appropriate uses and development types that could be located at a new 'village centre' for Maze. To include how to link this community to the Maze Long Kesh site and Down Royal Racecourse.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Maze Long Kesh Dev. Corp.; Down Royal Racecourse; Community Groups. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 		✓		★
6. To protect and enhance significant and valuable landscape areas and waterways	(a) Undertake further studies to establish the key areas of landscape and waterway value and prepare a 'Landscape Strategy' for the study area that set out guidance for these areas in terms of protection and enhancement measures.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Lagan Canal Trust. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 			✓	★
7. Enhance the Regional Significance of Sprucefield and expand its retailing role.	(a) Zone Sprucefield lands as a 'Regional Shopping Centre' in future statutory Local Development Plan; reflecting its regional role as per the RDS 2035.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	None.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 		✓		★★
	(b) Prepare a detailed masterplan or strategy to identify suitable regionally significant retail and complementary uses at Sprucefield.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Land owners. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	✓			★★
	(c) Provide necessary infrastructure and road links required to facilitate future development at Sprucefield (if required).	<ul style="list-style-type: none"> Land owners/developers. 	<ul style="list-style-type: none"> DRD; Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Developer funded. 		✓		★★

8. Increase sport, recreation and leisure activities in the West Lisburn area, with a particular focus on the River Lagan corridor.	(a) Undertake further studies in relation to potential leisure activity and appropriate water-sports development along River Lagan and identify suitable sites and uses.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Lagan Canal Trust; NITB; Local interest groups. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council; EU funding; NITB funding. 				
	(b) Produce a sports, recreation and leisure activity strategy for the West Lisburn area to guide future appropriate development in the area.	<ul style="list-style-type: none"> Lisburn & Castlereagh Council. 	<ul style="list-style-type: none"> Lagan Canal Trust; NITB; Local interest groups. 	<ul style="list-style-type: none"> Lisburn & Castlereagh Council; EU funding; NITB funding. 				

Key:

Timescales: short – 1-7 years;
 medium – 8-14 years;
 long – 15+ years.

Importance:  - critical
 - necessary
 - required but not critical

5.3 PHASING PLAN

The action plan sets out an indicative timeframe for the completion of each action identified. Those actions identified as being required to be completed or delivered within a short timeframe reflect either their importance in relation to the delivery of that objective or the ease with which those actions can be undertaken and completed.

The phasing plan identifies the order in which certain actions need to be undertaken so that the objectives of the plan can be delivered in a logical and sustainable manner. Some actions will be required to be undertaken and/or completed before other actions can be fulfilled. The overall phasing plan is provided on the next page. The following section provides an overview for the phasing rationale as it relates to each Framework theme and each strategic objective, as identified in sections 2.0 and 3.0 of this document.

Infrastructure, Roads and Transport (strategic objectives 1 and 2)

It is anticipated that infrastructure and roads/transport development will align and be delivered on a 'side-by-side' basis.

The delivery of the Knockmore Link Road is the most important action to undertake during the first phase of the WLDF implementation. **Action 1a** will secure agreement on funding and delivery for this major piece of infrastructure and **action 1b** will identify the preferred route, assemble the necessary lands and secure the relevant permissions to allow its construction.

Once the Knockmore Link Road has been secured, local distributor roads that will serve Maze Long Kesh and Blaris can be constructed as part of phase 2 (as per **action 2b**). The Knockmore Link Road will also allow improved infrastructure and road connections to Knockmore/Lissue industrial/employment lands (**action 3b**) as well as providing infrastructure within the Blaris lands that will facilitate development there (**action 5b**). The proposed West Lisburn train halt (**action 2a**) can be developed once the Knockmore Link Road is in place and utilise the improved links that the road will provide.

Once the main arterial roads and the local road networks are in place following phase 2, the cycle and pedestrian linkages can be completed during phase 3 of the Framework (**action 2d**). It is acknowledged that the development of cycle and pedestrian linkages can be developed either in advance of or alongside the road network development undertaken during phase 2, however it is expected that cycle and pedestrian linkages throughout the study area will be completed during phase 3.

Socio-economic (strategic objectives 3 and 4)

The first required action for this element is the production of a Local Development Plan (LDP) that zones land for employment use, based on the recommendations of this Framework (**action 3a**). The LDP will also identify Key Site Requirements (if appropriate) and these can be based on the 'development principles' set out for each employment zoning in this Framework. The LDP will also identify the Maze Long Kesh site as a 'Strategic Land Reserve of regional importance' (**action 4a**) and either as part of the LDP or through a separate study, identify potential business sectors that could avail of an Enterprise Zone designation (**action 4b**). The Knockmore Link Road will also be delivered during phase 1 of the

Framework (**action 1a & 1b**), which has implications for future economic development within the study area.

Infrastructure and road access improvements to the zoned employment lands at Knockmore/Lissue will take place during phase 2 of the Framework (**action 3b**), which will encourage and allow economic growth in this area. A direct link into the Maze Long Kesh site from the M1 can also be delivered during phase 2 of the Framework (**action 2c**).

Following delivery of the Knockmore Link Road and local distributor roads at phase 1 and 2, the relocation of storage and distribution uses from Culcavy to Blaris can occur during phase 3 of the Framework (**action 3c**). The development of on-site infrastructure and road links at the Maze Long Kesh site will also take place during phase 3 (**action 4c**), in anticipation of economic development in line with LDP zonings.

Housing and Population (strategic objective 5)

The first required action for this element is the production of a Local Development Plan (LDP) that zones land for residential use, based on the recommendations of this Framework (**action 5a**). The LDP will also identify Key Site Requirements (if appropriate) and these can be based on the 'development principles' set out for each residential zoning in this Framework. Either as part of this LDP or as a separate study, appropriate uses and types of development can be identified for a new 'village centre' at Maze (**action 5e**).

The zoning of land for residential development via a Local Development Plan in phase 1 will allow development to proceed for more social housing at Halftown (**action 5d**) during phase 2 of the Framework. The delivery of local distributor roads (**action 2b**) and improved infrastructure provision at the Blaris lands (**action 5b**) will also be delivered at phase 2, in anticipation for housing development at this site.

Once the local road network and linkages have been developed in phase 2, the storage and distribution uses at Culcavy can relocate to the southern portion of the Blaris lands in phase 3 (**action 3c**). Following this relocation, any necessary infrastructure and/or road improvements will be carried out at the zoned residential lands in Culcavy during phase 4 (**action 5c**), to allow future residential development to occur.

Natural and Built Environment (strategic objective 6)

The delivery of this strategic objective is not dependent upon incremental phases of action. As part of the LDP or as a separate study, the identification of key areas of landscape and waterway value can be undertaken during phase 1 of the Framework and a 'landscape strategy' prepared to guide future protection and enhancement measures (**action 6a**).

Retail (strategic objective 7)

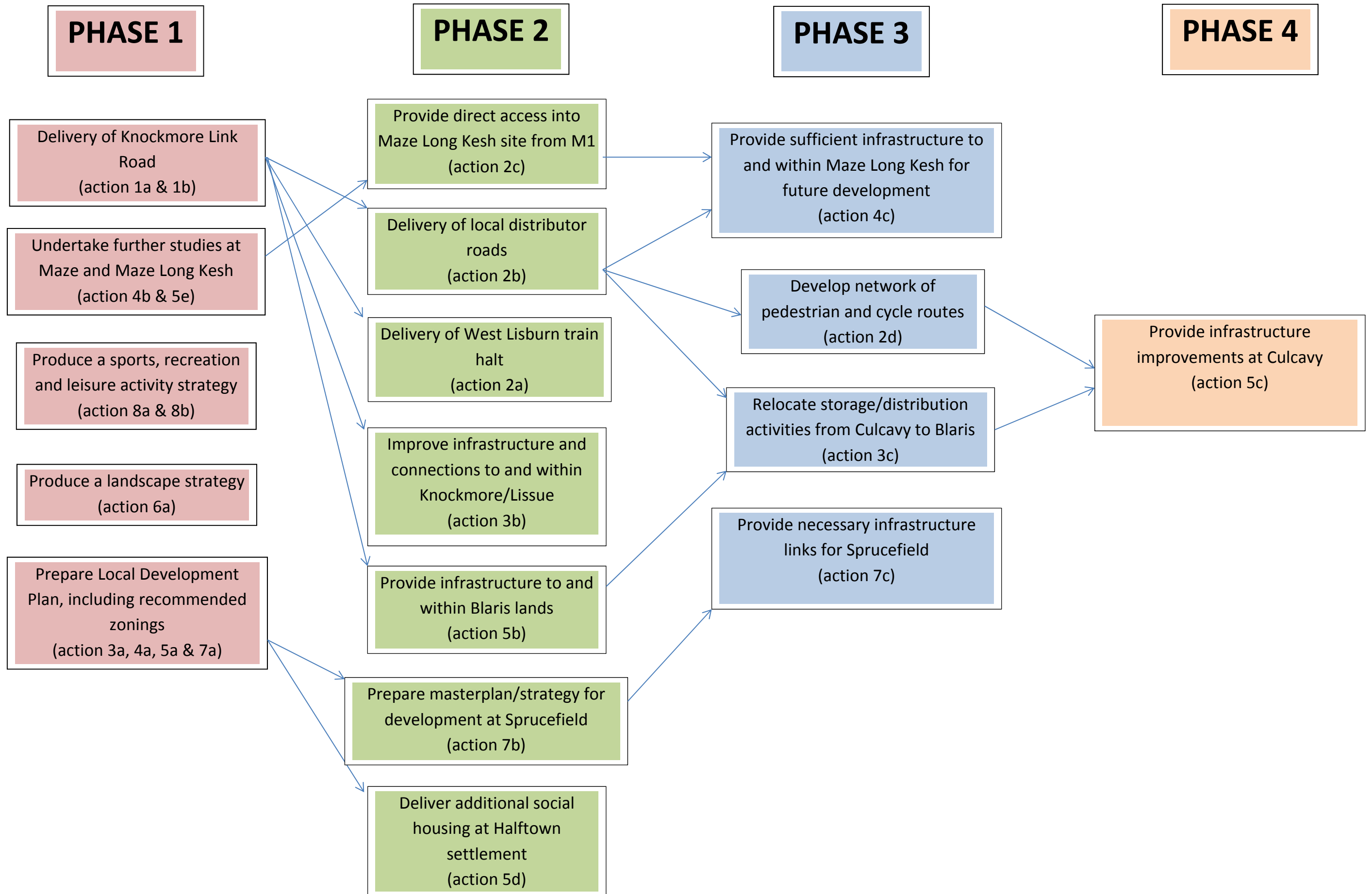
The preparation of the LDP will be undertaken during phase 1 of the Framework and identify Sprucefield as a 'Regional Shopping Centre', in line with the RDS (**action 7a**). The development of the Knockmore Link Road during phase 1 will also have implications for future development at Sprucefield (**action 1a & 1b**).

As a separate exercise, during phase 2 of the Framework, a masterplan or strategy for future development at Sprucefield should be developed (**action 7b**). This masterplan/strategy should be in line with both the RDS and LDP.

Once a masterplan has been agreed, the necessary infrastructure and road improvements required to realise the masterplan should be undertaken during phase 3 of the Framework (**action 7c**).

Sports/Leisure and Tourism (strategic objective 8)

The delivery of this strategic objective is not dependent upon incremental phases of action. As part of the LDP or as a separate study, the identification of potential leisure activities for the area (including watersports) can be undertaken during phase 1 of the Framework and a 'sports, recreation and leisure activity strategy' prepared to guide future potential development. (**actions 8a & 8b**).



APPENDIX 1 - Summary of document review

A number of reports, strategies and plans have been published in relation to the lands within the study area. These documents range from statutory instruments to spatial frameworks and action plans and relate to a variety of issues including land-use, physical development, transport and economic development. Such reports have been reviewed to ascertain what previous plans have been made for the study and the outputs of each document considered in terms of being integrated or included within the WLFP.

Northern Ireland Programme for Government (PfG)

The Northern Ireland Executive’s priorities for the current PfG are as follows:

- Growing a Sustainable Economy and Investing in the Future;
- Creating Opportunities, Tackling Disadvantage and Improving Health and Wellbeing;
- Protecting Our People, the Environment and Creating Safer Communities;
- Building a Strong and Shared Community; and
- Delivering High Quality and Efficient Public Services.

Of particular significance is growing a Sustainable Economy and Investing in the Future, which states:

“The primary purpose of this Priority is to achieve long term economic growth by improving competitiveness and building a larger and more export driven private sector.”

This means:

- More jobs/people in work;
- A better educated and more highly skilled workforce;
- A healthier population and a competent and confident well educated and more highly skilled workforce;
- Enhanced economic infrastructure;
- Encouraging innovation and research and development; and
- Developing the green economy.

Economic Development Strategy for Northern Ireland (EDSNI)

The overarching goal of this Strategy is to improve the economic competitiveness of the Northern Ireland economy. In order to achieve this, the strategy aims to focus on export led economic growth. This means prioritising the need to deepen and diversify the export base in order to increase employment and wealth across Northern Ireland. The key drivers of this will be innovation, research and development and skills of the workforce. The Strategy outlines that there are certain sectors and markets which have the greatest potential to succeed. The science/industry MATRIX panel has identified the following as being key sectors for growth:

- Telecommunications and ICT;
- Life and Health Sciences;
- Agri-food;

- Advanced Materials; and
- Advanced Engineering.

The Strategy goes on to highlight the importance of the following sectors to the development of the Northern Ireland economy:

- Creative Industries;
- Tourism;
- Social Economy; and
- Rural Economy.

Draft Innovation Strategy

The proposed Innovation Strategy sets out the long term actions necessary to ensure that innovation plays the full part in realising the vision of the Economic Strategy, including:

‘Northern Ireland, by 2025, will be recognised as an innovation hub and will be one of the UK’s leading high growth, knowledge based regions which embraces creativity and innovation at all levels of society’

In tangible terms this sort of transformation by 2025 will mean:

- Many more of our companies engaging in innovation, collaboration and exporting;
- Doubling the number of knowledge economy businesses and increasing their employment by 15,000
- Expenditure of £1billion per annum on R&D; and
- Greater numbers of young people achieving graduate and post graduate qualifications in STEM.

The key barriers to innovation are discussed in table 1.

Table 1: Barriers to Innovation

Barrier	Description
Knowledge	Absorptive capacity, trust, intellectual property, lack of communication, lack of information
Access to Capital	Availability of finance and cost of finance
Incentives	Lack of competition, lack of inducements, lack of ambition
Markets	Identifying opportunities, understanding opportunities, regulation, standardisation, access to markets and language barriers
Skills	Leadership, technological R&D, creative thinking.
Cultural Changes	Risk aversion, entrepreneurship, understanding innovation, managing change.

Source: Draft Innovation Strategy: DETI 2014

The draft innovation strategy highlights the importance of embedding innovation across all sectors, not just the leading high tech sectors and the West Lisburn Development zone has a concentration of low tech light manufacturing firms which could benefit from enhanced investment in research, development and innovation. Although there is not an explicit spatial element to the draft Innovation Strategy, several of the barriers, particularly those related to absorptive capacity, skills and cultural change can be in part mitigated through the use of cluster/supply chain interventions. The provision of accommodation for co-location of clusters and/or the wider supply chain can lead to knowledge exchange of best practice and the economies of agglomeration.

Investment Strategy for Northern Ireland

The focus of this strategy is on protecting jobs, fostering economic recovery and protecting public services. The Strategy's priorities reflect the Northern Ireland Executive's priorities which are:

- Growing a sustainable economy and investing in the future;
- Creating opportunities, tackling disadvantage and improving health and wellbeing;
- Protecting our people, the environment and creating safer communities;
- Building a strong and shared community; and
- Delivering high quality and efficient public services.

Various investments have recently been made in the Lisburn area, such as the development of a new campus for the South East Regional College. Lisburn is however identified in the Strategy as one of five deprived areas in Northern Ireland which will undergo a public realm scheme in order to stimulate investment and economic activity. The public realm scheme aims to: *"maximise the potential of the City Centre to position Lisburn as a contemporary European City, bringing the best possible benefit to its people and their quality of life"* (Lisburn City Council).

Regional Development Strategy 2035 (RDS)

This regional strategic document provides an overarching framework to facilitate and guide development. The spatial location of Lisburn at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor is noted. The RDS states that potential exists to grow the retail offer and develop flexible commercial accommodation at development locations such as Blaris and MLK. It also identifies the MLK site as being of regional significance and that a mix of uses will enable a major physical, economic and social development package of regional significance to come forward. The RDS also states that Sprucefield will continue to retain its status as a regional out-of-town shopping centre.

Lisburn Area Plan 2001 (LAP)

This plan is the current statutory plan for the Lisburn area. The majority of the subject lands are zoned as Greenbelt, with some industrial zonings to north (i.e. Knockmore/Ballinderry Road zoning – LD13 and Lissue zoning – LD14).

The Sprucefield complex is identified as a Regional Shopping Centre. Development limits are identified for small settlements within the study area, including Long Kesh and Lurganure but no development limit is identified for the Halftown settlement.

Belfast Metropolitan Area Plan 2015 (BMAP)

The 'Blaris Lands' are proposed to be brought within the Lisburn settlement and are zoned for employment/industry use (zoning LC07). It is identified as a major employment location, for which a number of key site requirements are listed for different development zones within the wider designation. It should be noted that a residential component to the northern section of the site was introduced at the Public Inquiry for BMAP (reference should be made to the Blaris Framework Plan 2009). Whilst DoE Planning accepted the introduction of residential uses onto these lands, the Planning Appeals Commission (PAC) in their report following the Public Inquiry recommended that zoning LC07 be retained for wholly employment use. However, the final decision will lie with DoE Planning in relation to the zoning for these lands and as DoE Planning were in agreement with the Blaris Framework Plan; it is likely that these zones will be included in the adopted area plan.

The existing Employment/Industry zoned lands at Knockmore and Lissue are carried through from the LAP (zonings LC9 and LC15 respectively). Key Site Requirements are set out for future development within the Knockmore zoning.

The Sprucefield complex is designated as a Regional Shopping Centre (designation LC16) and relevant policy sets out criteria for future development at this location. The PAC recommended that restrictions in relation to the range of goods to be sold at Sprucefield be deleted from the adopted plan, in order to allow Sprucefield to operate as a Regional Shopping Centre. In January 2013, the DoE Minister announced his decision in relation to retailing matters in BMAP. DoE Planning confirmed that they intend to retain the restriction on the types of goods to be sold at Sprucefield (i.e. limited to 'bulky' goods). However, the NI Executive will make the final decision in relation to Sprucefield and any associated policies before BMAP is adopted.

The Maze/Long Kesh lands are designated as a Strategic Land Reserve of Regional Importance (designation LN09). These lands are safeguarded from any development that would prejudice their potential as a reserve for future major developments of regional significance. Figure 3 illustrates the proposed zonings in BMAP.

The villages within the study area have all been defined with a settlement limit; Halftown, Long Kesh and Lurganure. There are also a number of environmental designations across the study area, including Local Landscape Policy Areas (LLPAs) and Sites of Local Nature Conservation Interest (SLNCIs), which are discussed further in section 3.3:

- Hillsborough LLPA (designation HH11);
- Kesh Bridge LLPAs (designations KE02 and KE03);
- Knockmore LLPA (designation LC12);
- Lissue LLPA (designation LC23);

- Lissue Children’s Hospital SLNCI (designation LC20/10);
- Long Kesh LLPAs (designations LH02, LH03, LH05 & LH06);
- Lurganure LLPA (designation LH02);
- Rathdown (Moira Road) LLPA (designation LC27);
- Ravernet LLPA (designation LC28); and
- Ravernet River SLNCI (designation LC20/15).

There is a strategic road scheme proposed that includes the widening of the M1 between Blacks Road and Sprucefield and a new link road between the M1 and A1 (proposal PA03). A non-strategic road scheme has also been identified – the Knockmore/M1 link road (proposal LC17), which will provide access to the major employment location at West Lisburn (i.e. the zoned Blaris Lands). Both these proposals are discussed in further detail in the ‘Roads and Transport’ section of this report.

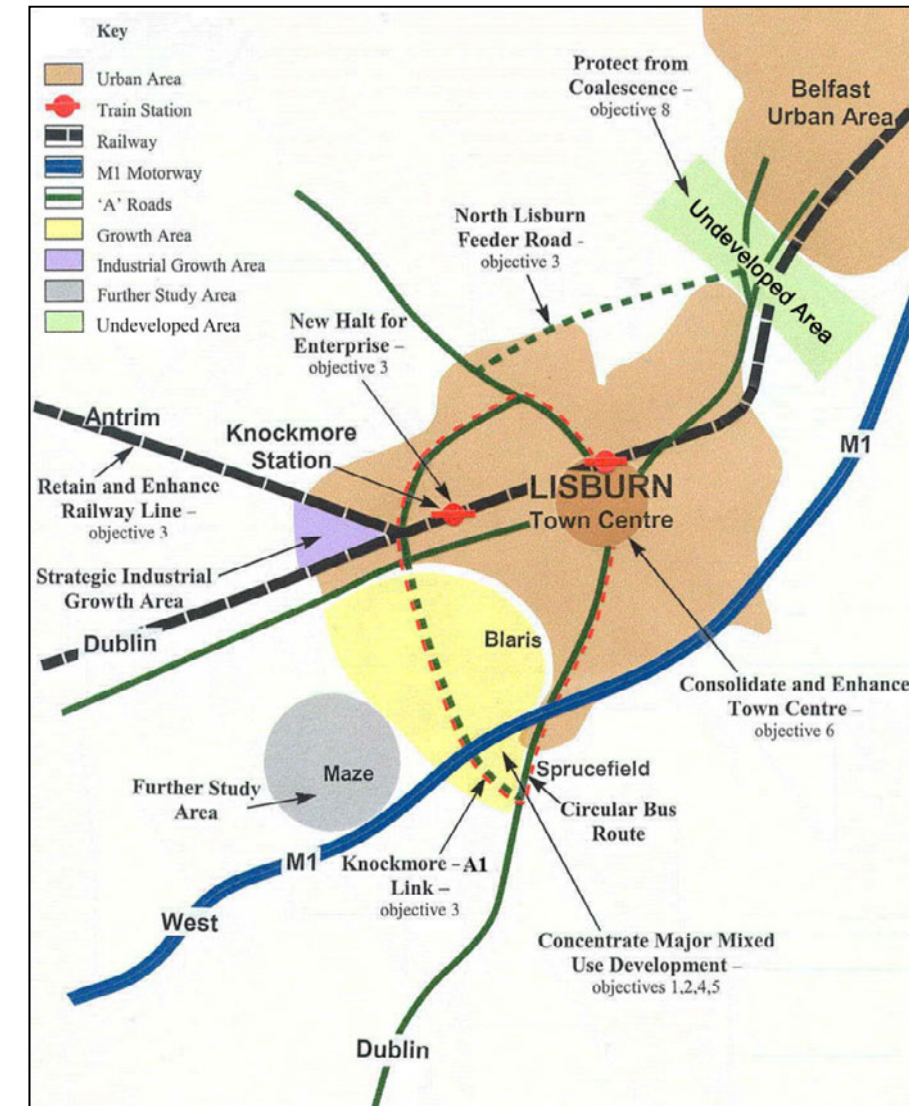
It is important to note that future area plans for Lisburn will be prepared by the new council and the council will be free to designate zones that could differ from those included in BMAP.

Physical Development Strategy for Lisburn Borough – March 2002 (PDS)

The PDS sets out the strategic intentions of the Council for the growth of the Borough over the next 10-15 years from its adoption in March 2002. The document is strategic in nature and does not comment upon site specific issues. However, it does provide clear objectives to realise the Council’s visions for the Borough which is “to maintain a sustainable and consistent approach to the short and long term growth and physical development of the Borough and its settlements.”

The PDS sets out a number of objectives that are mapped in figure 4, including:

- Concentrate new development within/at the edges of the existing main settlements of the Borough but particularly at Lisburn; Appropriate mixed-use development should be encouraged at the Sprucefield/west Lisburn location to, and including, the Maze;
- Completion of the transportation infrastructure, notably the provision of the Knockmore to M1 link road through the allocation of land for development;
- Encourage the provision of employment land in association with existing and proposed housing provision;
- Recognition of Sprucefield’s regional significance and encouragement of suitable development at this location.
- The distinctive settlements of Lisburn and Belfast should be retained and coalescence should be avoided.



Mapping of key objectives from PDS

Economic Development Action Plan 2012-2015 (EDAP)

The aim of the EDAP is to maximise opportunities for wealth creation across the City. EDAP sets out how to deliver an integrated programme of business development, regeneration, investment, city centre management, tourism and rural development initiatives designed to contribute to the Council’s vision of making Lisburn City the outstanding location in Northern Ireland to live, work, invest and visit. It focuses on four key areas: Business Competitiveness, Tourism Development, City Regeneration, and Rural Development and action plans have been prepared for each area.

The Tourism Action Plan aims to develop new and exciting quality tourism product offerings for visitors and locals (including destinations linked with cycling and walking). It encourages the development of new hotel(s), the creation of new jobs, an increase in Lisburn’s international profile, attraction of new visitors and new private sector investment in the sector.

The Regeneration Action Plan identifies the Lagan Corridor as having the potential to link into the Maze/Long Kesh site and back to Lisburn City Centre. It also identifies the re-opening of the River Lagan Navigation

system and Union Locks, which could feed into the Tourism Action Plan. The Maze/Long Kesh site itself is identified as a major regeneration opportunity site. The Regeneration Action Plan also sets out the potential for strategic projects that could be delivered in selected rural villages including environmental improvement works, rural heritage works and sports/community facilities. These potential projects also feed into the Rural Development Action Plan, which has the overall aim of creating and developing rural businesses and tourism projects.

Blaris Development Framework Plan 2009 (BDFP)

The BDFP collates and consolidates a number of studies and design concept exercises carried out for these lands, including a masterplan that was produced in 2006 to support a planning application (subsequently withdrawn). The Blaris Lands have the potential to be an urban expansion of Lisburn on a 363 acre site, which could provide a strategic ‘rounding off’ of the City and improved connections between north and west Lisburn and to Sprucefield at the junction of the M1/A1 corridor.

The BDFP provides a robust context within which a first phase and future developments can proceed. It also provides supplementary planning and design guidance for future developers on the principle issues of land uses, community facilities and physical and social infrastructure that are required to make a legible, cohesive and sustainable urban expansion.

The vision for the Blaris lands is to create a high quality, sustainable and integrated expansion of Lisburn City that will provide major benefits to the city as a whole, whilst creating a distinctive character and sense of place. It recognises that a project of this magnitude is likely to develop over some 15-20 years and identifies a broadly indicative phasing of how the area is anticipated to come forward. In broad terms, the northern section of the lands will be residential and riverside parkland, with commercial development on the southern section.

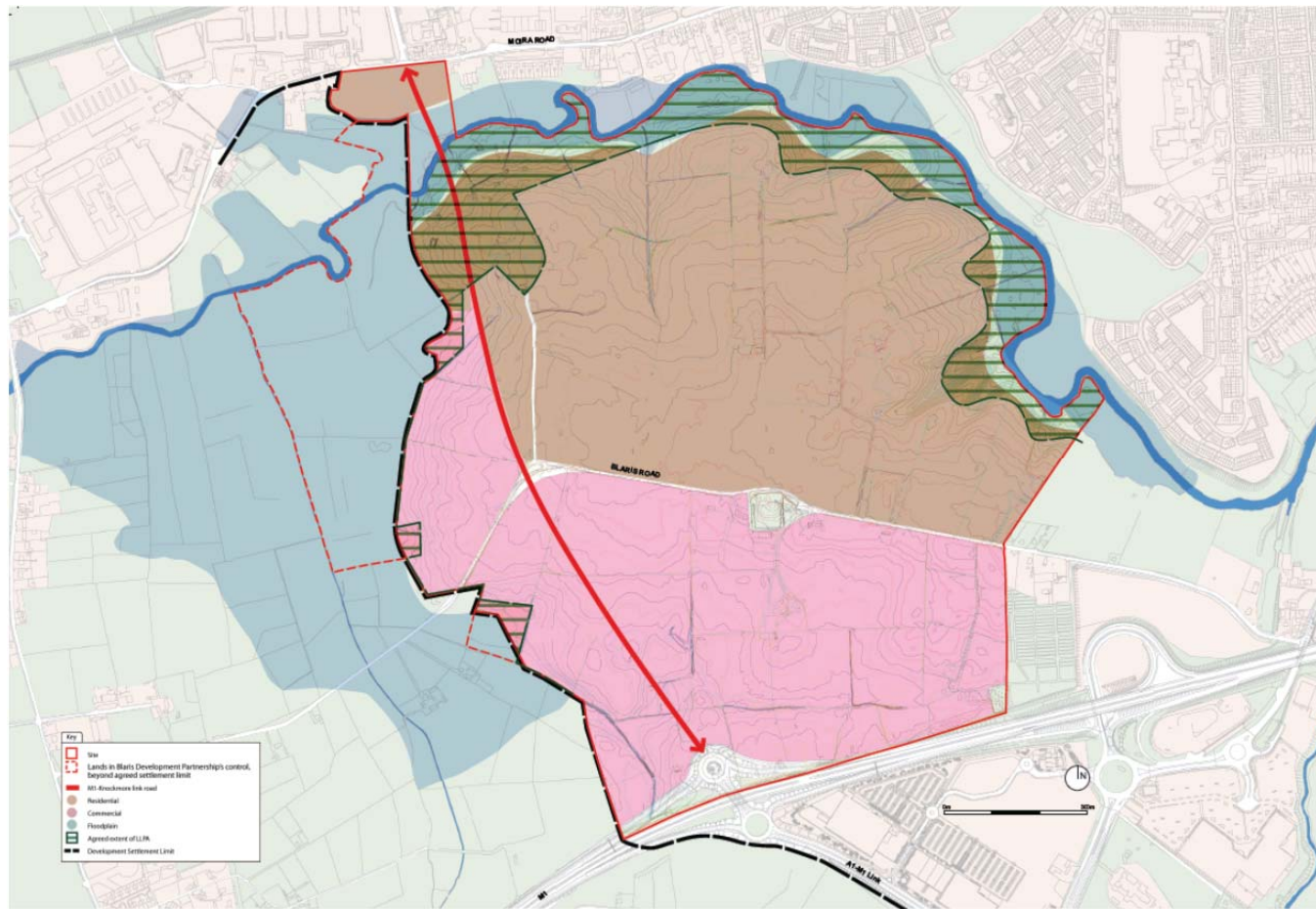
The BDFP comprises the following land uses and principles:

- *Business uses* – i.e. Research & Development, offices, high technology based companies, call centres and light industrial units. Specifically, BDFP aims to provide a high quality business campus to attract large, medium and small business users whose needs and space requirements extend beyond the traditional offer of city centres;
- *Residential neighbourhood* – delivering traditional and more innovative forms of dwelling types within a landscaped setting that includes walkable routes between and around the housing and community infrastructure;
- *Commercial Leisure* – including potential cinema complex, cafes, bars, restaurants and health and fitness uses, around the central core of the site;
- *Hotel & Conferencing facilities* – an event venue located centrally, to facilitate business uses on site;
- *Linear Riverside Park* – a highly attractive landscaped setting within the residential and business environments

- *Boulevard Access* – to deliver the strategically important M1-Knockmore link road that will run through the site connecting north and west Lisburn to Blaris and Sprucefield, and to the A1 Belfast to Dublin Corridor and the M1 Motorway;
- *Localised retail and other commercial uses* – the service both residential and business uses;
- *Potential new secondary school campus* – subject to negotiation with local Education & Library Board;
- *An open space network* – to embrace and extend the biodiversity character of the site; and
- *A legible network of routes through the site* – including a ‘park and ride’ transport hub located centrally, encouraging regular and interconnected public transport services linking to Lisburn City Centre, the M1 and the wider region.

Advanced infrastructure will be necessary in the early establishment of the Blaris Lands development. The M1-Knockmore link road and initial advanced landscaping works to deliver Phase one of the riverside park and the business “campus” should be included in early “enabling” works.

DoE Planning has confirmed that the BDFP provides an acceptable basis for the future development of the lands as a mixed use zoning. However, at the Public Enquiry into BMAP, the Planning Appeals Commission recommended that the lands should principally be for employment use.



Overall design concept plan from BDFP

Spatial Framework for Maze/Long Kesh 2013 (SFMLK)

The strategic vision for these 347 acres lands is for MLK to be recognised universally as a global exemplar of transformation from conflict to peace and from peace to prosperity. The SFMLK aims to guide the transformation and regeneration of MLK, establish a framework for early decisions on investment in infrastructure and to provide a context for planning decisions in relation to the initial phases of development.

The site offers the opportunity to deliver a mixed use development which seeks to create a vibrant, sustainable and flexible development.

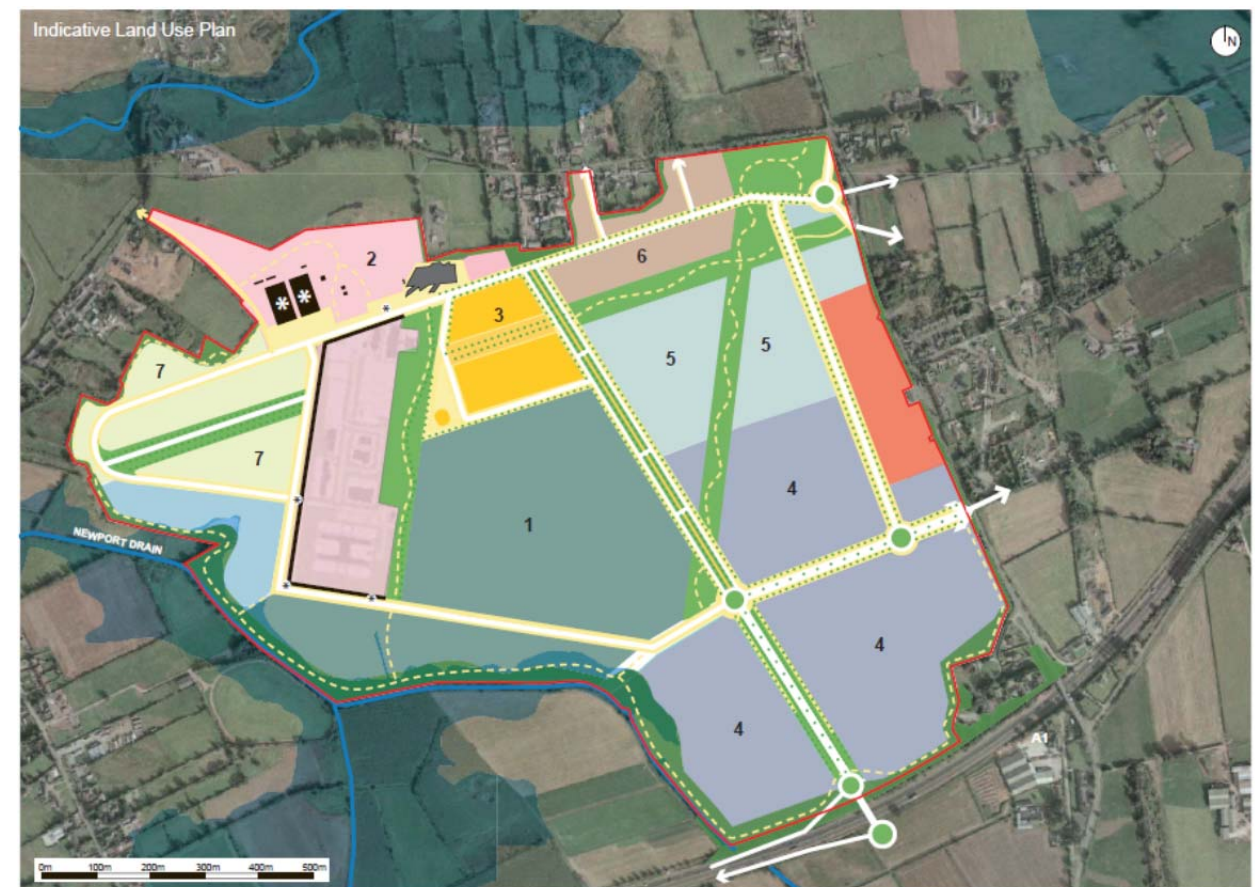
The key objectives in the document are:

- to maximise the economic development potential of the site;
- to prepare the site for development through the provision of necessary infrastructure;
- to facilitate development and activities that are appropriate and inclusive and will realise the site’s historic and reconciliation potential; and
- to engage with all stakeholders to encourage participation.

The SFMLK provides 5 interlinked strategies for the subject lands:

- Landscape and Heritage Strategy;
- Movement Strategy;
- Land Use Strategy and Development Zones;
- Built Form Strategy; and
- Energy and Utilities Strategy.

Paramount to this Spatial Framework is its ability not to be so definitive in zoning so as to close out or prejudice opportunities. It is robust yet flexible to accommodate current demands and provide for future uses that will undoubtedly manifest.



1	RUAS
2	Proposed P&CR
3	Cultural Focus
4	Community Zone
5	Mixed Use Hub
6	Business / Employment
7	Education / Research & Development / Recreation
8	Exemplar Residential
9	Scheduled Aircraft Hangars
10	Reserve Lands
11	Waste Water Treatment Plant

Numbers refer to Economic Development Zones

Indicative Land-use plan for MLK lands

Summary

There are a number of common themes running through the reviewed plans and programmes that help to inform this framework plan. These include:

- The promotion and expansion of a range of employment uses in the area;
- The need for multi modal transport infrastructure to aid connectivity and facilitate growth;
- Expansion of retailing and a greater role for Sprucefield;
- The potential to increase tourism, recreation and leisure uses along the River Lagan; and
- The opportunity for major local development at Blaris;
- The potential for a range of uses of a regionally significant scale at MLK; and
- To promote social regeneration through access to community services, connectivity between local communities and linkages to Lisburn City Centre and the wider region.

The WLFP will seek to consolidate the positive aspects of the reviewed plans and programmes and incorporate the above key themes into a strategy for the entire study area.

APPENDIX 2 List of stakeholders and summary table of consultation responses (baseline assessment)

Adrian Bird (Resurgam)
 AM Services
 Brenda Turnbull (Lagan Canal Trust)
 Breezemount
 BUFAB Ireland Ltd
 Coca Cola Hellenic BC
 Community Care Appliances
 Davonne House Bakes Ltd
 DECOR Ireland
 Desmond Eastwood Motors Ltd
 DF Ross
 DLRS Group
 DM Laser Fab
 Dunmurry Upholstery
 Eagle Overseas Transport
 Edina Power
 Eglantine Farm Products
 EOS Warehousing (subsidiary of Eagle Overseas Transport)
 Food Co.
 Gardiner Farm Equipment Ltd
 G.E. Energy
 Golden Glen Catering
 Gowdy's at the Racecourse
 House of Vic-Ryn
 Intu Properties plc
 Janet Gray (Water-skier)
 J & G Hamilton Ltd.
 John Thompson Mill (ABN)
 Johnston Contracts Kitchens
 JPN Logistics Ltd.
 JRC Auto
 Lagan Valley MP and MLAs
 Lagan Valley Steels
 Law Transport Services
 Lester Engineering
 Lindsay Cars
 Lisburn Golf Club
 Lisburn Proteins
 Lisburn Rugby Club
 Lowe Refrigeration
 McGrath Group
 MacNeice Auto & Plant Works
 MD Ireland
 Meadow Bakery

Mercury Security Management
 Mike Todd (Down Royal)
 MLK Development Corporation
 Modern Machinery Supplies Ltd
 Moores Caravan Sales
 Morrow Tanker Services
 Mulgrew Haulage
 Nelson Hydraulics
 NM Forktrucks Ltd.
 Noonan Security Services
 Northern Excavators
 Olympic Lifts
 Outdoor Recreation NI
 Paperman Products
 Paul Dick Tyres
 Performance Tyre Services
 Phillip McCallen Motorcycles
 Plumb Rite Supplies
 Powerhouse Sport- Onex Ltd
 Premier Inn, Lisburn
 PRM
 PVI Solar Energy Capture
 Reach E.P.S. Ltd
 ROMAL Rural Network
 Royal Society for the Protection of Birds
 Rural Development Council
 Safetykleen
 Safety Solutions NI
 Sebden Steel
 Sembarc Ltd.
 SERE Ltd.
 Shore Distribution Ltd.
 Sprucefield Retailers:

- Currys
- Frankie and Benny's
- Next
- Boots
- Pets at Home
- Marks and Spencer
- McDonalds
- Sainsburys
- Argos
- PC World
- B&Q

- Toys r us

Sustrans Northern Ireland
 TAL
 Tata Steel
 The Paint Centre
 The Storage Centre
 Trade Team Ltd
 United Biscuits
 Ulster Angling Federation
 Ulster Farmers Union
 Ulster Wildlife Trust
 Warmflow Engineering Ltd
 Wildfowl and Wetlands Trust
 Woodland Trust
 WWF Northern Ireland
 4 Corners Sign and Display

Statutory Agencies/Government Departments

Council for Nature Conservation & the Countryside (CNN)
 DARD - Countryside Management Branch
 DARD - Quality Assurance
 DARD – Rivers Agency
 DARD - Veterinary Service
 DOE Planning & Natural Resource Division
 DOE Planning & Environmental Policy Group
 DRD – Roads Service
 Invest NI
 NIEA – Built Heritage Unit
 NIEA – Historic Monuments Unit
 NIEA – Land and Resource Management Unit
 NIEA – Natural Heritage
 NIEA – Water Management Unit
 Translink

Consultee/Stakeholder	Engagement Date	Response/Meeting Summary	Key Issues
SIB (Roads - Kevin McShane)	16.4.2014 (meeting)	<ul style="list-style-type: none"> - Blaris lands: Knockmore Link was developer led (Snoddens/ Killultagh proposal - 10 years ago) - Dual carriageway link from Knockmore link to MLK site running parallel to the motorway - has been through feasibility stage - M1 will have western on-off slip only at the MLK site - Halftown Road to be looped round the back of the community centre which will make the existing portion of Halftown Road in front of the community centre an access road into the housing. - Park and ride planned for corner of Moira Road and Knockmore Road adjacent to a new rail halt - Consideration is also being given to another rail halt further west at Maze (Moira Road) 	<ul style="list-style-type: none"> - Delivery of Knockmore Link. - Link into MLK site from Knockmore Link. - Direct access from M1 into MLK also. - Protection of Halftown from new infrastructure. - Planned park & ride and public transport developments.
Resurgam Trust	29.4.2014 (meeting)	<ul style="list-style-type: none"> - Road infrastructure is a big issue, in particular, lorries from local S&D warehousing in Culcavy. Road network needs to be upgraded. - Despite above, Resurgam was originally opposed to the link road from Knockmore to MLK due to the impact it would have on Halftown. - Expansion of Halftown: they are keen to contain Halftown as a settlement in its own right and ensure that it is not subsumed into surrounding development, including the MLK site - want to maintain and reinforce that buffer. - Scope for small areas of expansion within the existing envelope of Halftown for allotments and housing for the elderly - in the south east corner. They are also keen to expand beyond the existing envelope and consider that lands to the north of the settlement would be the appropriate direction to expand - sufficient space for 20 or so houses. - Improvement of appearance of the settlement that fronts Halftown Road is necessary and should be part of the MLK plan for the area - the entrances into MLK on both sides have been improved but not Halftown. - Their priority is to get the road realigned and the landscaping and workshop units built. In association with this is the walkway around the MLK site which links in with the landscape proposals for Halftown. Both of these issues need to be addressed asap in order to give confidence to the local people that something is going to happen. - In general, the local residents are keen to remain in a rural setting - they would not like to see development encroach from the Blaris land and subsume the settlement - need for a strong buffer on all sides. 	<ul style="list-style-type: none"> - Investment in road infrastructure required. - Protection of Halftown from new infrastructure. - Potential expansion of Halftown. - Retain rural buffer around Halftown.
INTU	30.4.2014 (email)	<ul style="list-style-type: none"> - Intu Properties have acquired Sprucefield from Westfield - The historic planning situation at Sprucefield has caused significant uncertainty and resulted in Sprucefield not delivering upon its Regional Centre status - matter must be addressed both at regional and local level to ensure investors have certainty going forward and are therefore able to invest in the centre and wider area, requested opportunity to discuss the role they see Sprucefield playing in attracting investment and a catalyst for regeneration and growth. - Their SPPS submission seeks clarity in strategic policy relating to town centres and retailing, particularly with the regard to regional level facilities, namely: <ul style="list-style-type: none"> a) Confirm the status of Sprucefield as a Regional Shopping Centre (RSC) consistent with its definition in the RDS and with the need for clearly defined retail hierarchy; b) Establish a policy that supports the Regional Role of Sprucefield; whilst at the same time recognising its complementary relationship with other centres; c) Ensure that policy tests including the sequential approach properly reflects ongoing need for regional level facilities; d) Reconsider the current approach to transitional arrangements; and e) Prioritise sustainable economic growth (or development) in Northern Ireland. 	<ul style="list-style-type: none"> - Promotion of Sprucefield as a regional centre. - Investor certainty for future development required - Sprucefield to act as a potential catalyst for other developments in area.

Consultee/Stakeholder	Engagement Date	Response/Meeting Summary	Key Issues
PSNI	30.4.2014 (email)	- PSNI intend to retain site at Sprucefield as a long term asset, it is currently utilised for office and storage; envisage further development on site over time but at present have no firm plans in place	- Retain PSNI lands.
Janet Grey (water skier)	1.5.2014 (email)	<ul style="list-style-type: none"> - wishes to set up a Janet Gray Water Ski Centre for NI, to give others, especially young people, the opportunity to enjoy and experience water sports - Cable Water Skiing is a very affordable way to open up the sport of Water Skiing to everyone. A Two Tower Cable Ski System is an extremely efficient and inexpensive way to get started and is very ecologically friendly, as the system runs on electricity and a boat is not required, 1m deep water - plan would be to start with 1-2 Straight Line Cables and then develop the Centre to include traditional water skiing and also other water sports and perhaps through time, a Water Sports Centre of Excellence - would like to locate the Centre at a suitable and accessible site within the Borough of Lisburn and/or Castlereagh. 	<ul style="list-style-type: none"> - Potential for Water Ski Centre on River Lagan. - Potential expansion into Water Sports Centre of Excellence.
Mike Todd (Down Royal Race Course)	1.5.2014 (meeting)	<ul style="list-style-type: none"> - Race course operator currently renting (owned by Mike Rodden). Any future development of race course subject to securing long-term lease or buying site outright. - Future development would include redeveloping grandstands and providing improved infrastructure (parking and access). - Direct link to M1/A1 would greatly benefit race course - currently logjam during race meetings (up to 12 per year) and surrounding roads do not have capacity for attendances (c.7,000 per meeting). - No focus to Maze village. Potential to use race course for community events and potential for community hub at race course/Gowdys junction. 	<ul style="list-style-type: none"> - Improved road linkages required. - Potential expansion of race-course facilities. - Potential for greater community link. - Need for focal point to Maze settlement.
Brenda Turnbull (Lagan Canal Trust)	2.5.14 (meeting)	<ul style="list-style-type: none"> - The aim of the Trust is to connect Lough Neagh with Belfast via a restored canal (known as Lagan Navigation) - The navigation through Lisburn is on the River Lagan – parts of which need to be straightened in order to be navigable - They have a 15 year £100m plan in 2 phases – phase 1 is from Belfast to Union Lock (9 years); phase 2 is from Union Lock to Lough Neagh (6 years); - 5 new visitor nodes to be created, one of which is Union Lock, another is the MLK site and Down Royal; - While the plans should be implemented in sequence, there are opportunities for development of small projects along the route – e.g. cycle network to MLK along the riverside (Alan Clarke at MLK has an interest in this and should be consulted directly). Where it is not currently possible to provide cycle paths along the south side of the river due to private land ownership, LCT are trying to obtain NIHE land on the northern side of the river (Old Warren estate) for a cycle path which could then connect back across the river via a bridge; - Another potential project is a marina development (16 berth) at Bog Road (closest connection point to MLK) – an alternative siting is beside Down Royal on the other side of Gravelhill Road. - The straightening of bends in the river provides opportunities for water sports, fishing etc.; - Janet Gray proposals for a water sports centre could be accommodated in areas currently subject to flooding (e.g. Blaris or near Down Royal at Gravelhill Road) – this is regarded as flood storage and is necessary in any case for use in navigation during drier spells; - Brenda is to supply: Route Plan; MLK marina plan; briefing note of work planned; Glasgow paddlers project (example of water sports). 	<ul style="list-style-type: none"> - Greater connectivity via restored canal. - Potential for visitor nodes along canal. - Potential to link into other networks (cycling/walking). - Potential marina development at Bog Road. - Tie in with water sports centre.

Consultee/Stakeholder	Engagement Date	Summary of Response/Comments	Key Issues
<p>Sarah Noble (Outdoor Recreation NI)</p>	<p>2.5.14 (meeting)</p>	<ul style="list-style-type: none"> - Provided an overview of a study they have done in the area. - Suggested a traffic-free connection to the Maze / Long Kesh site from Lisburn City. There is currently an informal path running along the Northern edge of the M1 which was created to provide access to land cut off by the creation of the Motorway. This runs from Union Locks all the way to the Halftown Road which borders the Maze / Long Kesh site. - There is the potential for boats to operate shuttle services to Down Royal Racecourse from Union Lock, when races are on. - Suggested a link from the current footbridge at Union Locks along the North of the River connecting to the Moira Road would open up the entire towpath and river to this - MLK Development Corporation is proposing to develop a shared walking /cycling path from Union Locks to its site which opens up the potential to create a 10km multi-use circular route from Union Locks along the motorway through the site and returning along the Lagan. - The proposed loop highlighted for Union Locks above would also provide easy pedestrian and cyclist access from Old Warren to the facilities which will be provided at the MLK site. - A high quality shared use connection to Hillsborough should also be considered. - The Lagan Canal Trust proposals at this site include a new marina facility with boat trailer park, slip way and services building. - A multi-use trail network has already been designed for the MLK site and includes a link to the Towpath which would enable users to pass through the site to and from Lisburn; creating an additional route option on the long distance trail. In order to accommodate the Towpath users, the facilities on the site should include a cycle and equestrian accessible two way trail. 	<ul style="list-style-type: none"> - Traffic-free connection from Lisburn to MLK. - Connection along river corridor. - Potential for shuttle boats linking Racecourse to Lisburn. - Opening up of Towpath to cyclists, pedestrians and horses. - Potential circular route from Lisburn, along river corridor and back again via existing pathways adjacent to M1. - Potential for marina facilities and slipways.
<p>Invest NI</p>	<p>6.5.2014 (meeting)</p>	<ul style="list-style-type: none"> - Invest NI have c.8.2 acres of land at Knockmore Hill Industrial Estate. Other ownership relates to serviced/already developed sites. - Tenancy is near full and popular location for a range of users (predominantly traditional 'light industrial'/manufacturing - use class B2). - Any growth by existing companies in the area and existing industrial estates would be accommodated on site rather than any requirement for relocation or new, purpose built accommodation within study area. - In general, sufficient lands have been zoned in BMAP (both existing and proposed zonings) to meet future expected industrial/employment need in the area, for the next 15+ years. It is not expected that any new or significant FDI will locate to within the study area. - Invest NI would oppose the loss or alternative use of zoned industrial/employment lands, including Blaris lands. However, if developed as a mixed-use site, there is potential for remaining zoned lands to meet future needs also. Any mixed-use scheme at Blaris should have a separate access for industrial rather than a combined access with residential element. - There should be no conflict between potential industrial/employment uses at MLK and the zoned lands at Blaris. Any industrial/employment/business uses should complement rather than compete. 	<ul style="list-style-type: none"> - Existing industrial accommodation well occupied. - Traditional light industrial/manufacturing in area. - Sufficient lands allocated for employment. - No major FDI expected in area. - Recommend protection of employment/industrial lands.
<p>Steven and Andrew Thornton (via Eastwoods Estate Agents)</p>	<p>7.5.14 (email)</p>	<ul style="list-style-type: none"> - Ownership interest in Blaris Lands (c.96 hectares). - Fully support the Framework Plan which DoE Minister agreed for Blaris Lands. 	<ul style="list-style-type: none"> - Support for development on Blaris Lands.
<p>Desmond Eastwood Motors (lands at 197 Moira Road)</p>	<p>7.5.14 (email)</p>	<ul style="list-style-type: none"> - Although the BMAP has shown these lands as White Land, they feel that the land along the road frontage would benefit favourably by being zoned for commercial use with the remaining land to the rear which extends to the Lagan River Park being more suitable for residential development. 	<ul style="list-style-type: none"> - Support for more commercial and residential lands at Moira Road.

Consultee/Stakeholder	Engagement Date	Summary of Response/Comments	Key Issues
Arqiva	7.5.14 (email)	<ul style="list-style-type: none"> - Radio broadcast site which Arqiva owns and operates at Hillsborough Road (approximately 13.5 acres), is a major land holding and falls within the BMAP Sprucefield Regional Retail Centre. - Although the site operates MF radio services, it is highly likely that the land will become available for other uses in the lifetime of the Development Framework. - Have engaged quite recently with the DoE Planning on 'strategically significant' reuse of the site, although opportunities at the site span back nearly 20 years, with outline planning permission granted in 1998 for redevelopment of the site as an extension to the adjacent M & S retail store (not implemented). - Wishes to be fully engaged in preparation of WLDF. 	- Development opportunity site within Sprucefield zoning.
DRD Roads Service	8.5.14 (meeting)	<ul style="list-style-type: none"> - Roads Service has two main road proposals in this area. - Strategic Road Scheme includes works to M1 between Blacks Road and Sprucefield. - The existing route corridors are only options at this stage and a final proposal may not use the corridor currently protected. - Non-Strategic Road Scheme is the Knockmore Link, which is to provide a suitable road link to the major development sites in the area. It is a developer led scheme and is not within Roads Service programme for delivery. It is unlikely that this will now be progressed under the current economic climate. 	<ul style="list-style-type: none"> - Road works to M1 between Blacks Road and Sprucefield. - Konckmore Link to be developer led, not within Roads Service programme for delivery.
Eglantine Farm	9.5.2014 (letter)	<ul style="list-style-type: none"> - Desire to see lands retained for agriculture, growing or produce; area considered as having fertile soils. 	- Retain fertile agriculture lands.
David Prentice Properties (lands at Hillsborough Road)	13.5.2014 (letter)	<ul style="list-style-type: none"> - Set out significant planning history for site in ownership: retail warehousing permissions dating back to 2006. - Supportive of removing restriction to bulky goods being sold at Sprucefield. - Supportive of greater emphasis being placed on Sprucefield as a regional shopping centre. 	<ul style="list-style-type: none"> - Promotion of Sprucefield as regional shopping centre. - Removal of restrictions of scale of retailing at Sprucefield.
DARDNI Quality Assurance Branch	14.5.14 (letter)	<ul style="list-style-type: none"> - Advised that area is subject of a Notice served relating to Potato Cyst Nematode (PCN), which prohibits the movement of soil or other material from these lands except under licence. 	- Restrictions on movement of soil.
DARDNI Rivers Agency	14.5.14 (letter)	<ul style="list-style-type: none"> - Further consultation required for specific development proposals in relation to land drainage, flooding and impact of works upon watercourses. 	- Future consultation re: specific development proposals required.
Ronnie Nesbitt (lands at 219 Moira Road)	16.5.14 (letter)	<ul style="list-style-type: none"> - Requested that lands be included in Framework and considered for future development. - Lands partially developed for commercial. 	- Requested lands identified as suitable for development.

APPENDIX 3 overview of desk-top and on-site findings

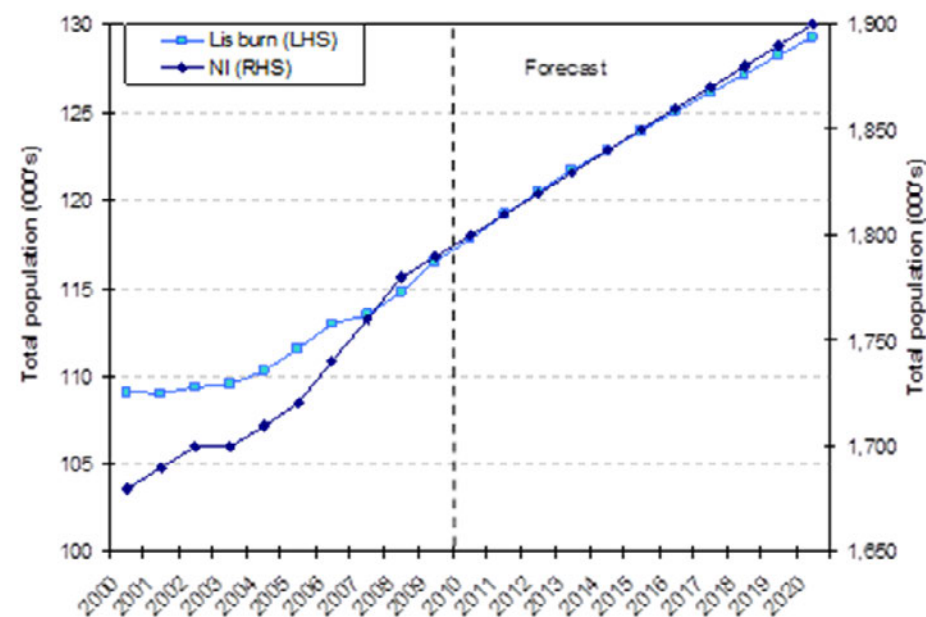
The existing physical condition and key features of the subject site lands have been considered and divided into a number of ‘themes’. The following sub-sections summarise the existing situation and also comments on known plans and programmes for each of the themes listed. This setting of the baseline for the subject lands will help to inform the outputs of the WLDF; as it establishes current or potential opportunities and also helps to identify where growth can take place and the type of growth/investment required for the area.

Housing and Population

According to the 2011 Census, Lisburn City council area had a projected 2012 population of 121,687; second only to Belfast in terms of total number of residents. This represents a c.12% increase in population since the 2001 Census figure of 108,694.

The West Lisburn area has a population of 18,680. The wider Lisburn City Council area enjoyed a stronger rate of population growth than the regional average between 2000 and 2010 (8% compared to 7.1%). The graph below provides a forecast of anticipated population growth between 2010 and 2020 for Lisburn and Northern Ireland.

Population Growth (NI and Lisburn)



Source: NISRA, Oxford Economics

The total population for the City of Lisburn is expected to rise from 117,840 in 2010 to 129,290 (9.7%) by the end of the decade. This increase represents a slightly higher rate of increase than the Northern Ireland average (9.7% compared to 5.7%).

The West Lisburn study area covers the following wards, made up as follows:

- Blaris (with a population of 3,375);
- Knockmore (with a population of 4,298); and
- Maze (with a population of 3,813).

Based on a growth rate of 9.7%, the population within each ward by the end of the decade would be:

- Blaris – 3,702;
- Knockmore – 4,714; and
- Maze – 4,182.

The original RDS document (RDS 2025) set Housing Growth Indicators (HGIs), which allocated regional housing need across Northern Ireland up to 2015. Lisburn made up part of the Belfast Metropolitan Area that was allocated a total of 51,000 dwellings to be delivered by 2015. The latest RDS document (RDS 2035) again included Lisburn within the wider Belfast Metropolitan Area and allocated 50,100 dwellings to be delivered by 2025 for the wider Belfast Metropolitan Area.

Based on the RDS HGI’s, the draft area plan (dBMAP) allocated a total of 246 hectares for housing in the Lisburn City region. According to the DoE Planning ‘Housing Monitor’ results for 2013, a total of 3,585 dwellings were built between January 2009 and July 2013 in the Lisburn City area (on 141 hectares of land). The 2013 ‘Housing Monitor’ also states that there remains approximately 195.6 hectares of potential housing development land available in the Lisburn City area (including both zoned and unzoned land), which could provide 5,569 new dwelling units.

The 2013 ‘Housing Monitor’ report suggests that there remain sufficient residential zoned lands (as per dBMAP) to accommodate new residential development for the next 10 years, based on the development rate for the period from January 2009 to July 2013.

Infrastructure

Both existing/current infrastructure provision and planned future provision within the study area have been considered. Existing infrastructure provision has been recorded in figure (i).

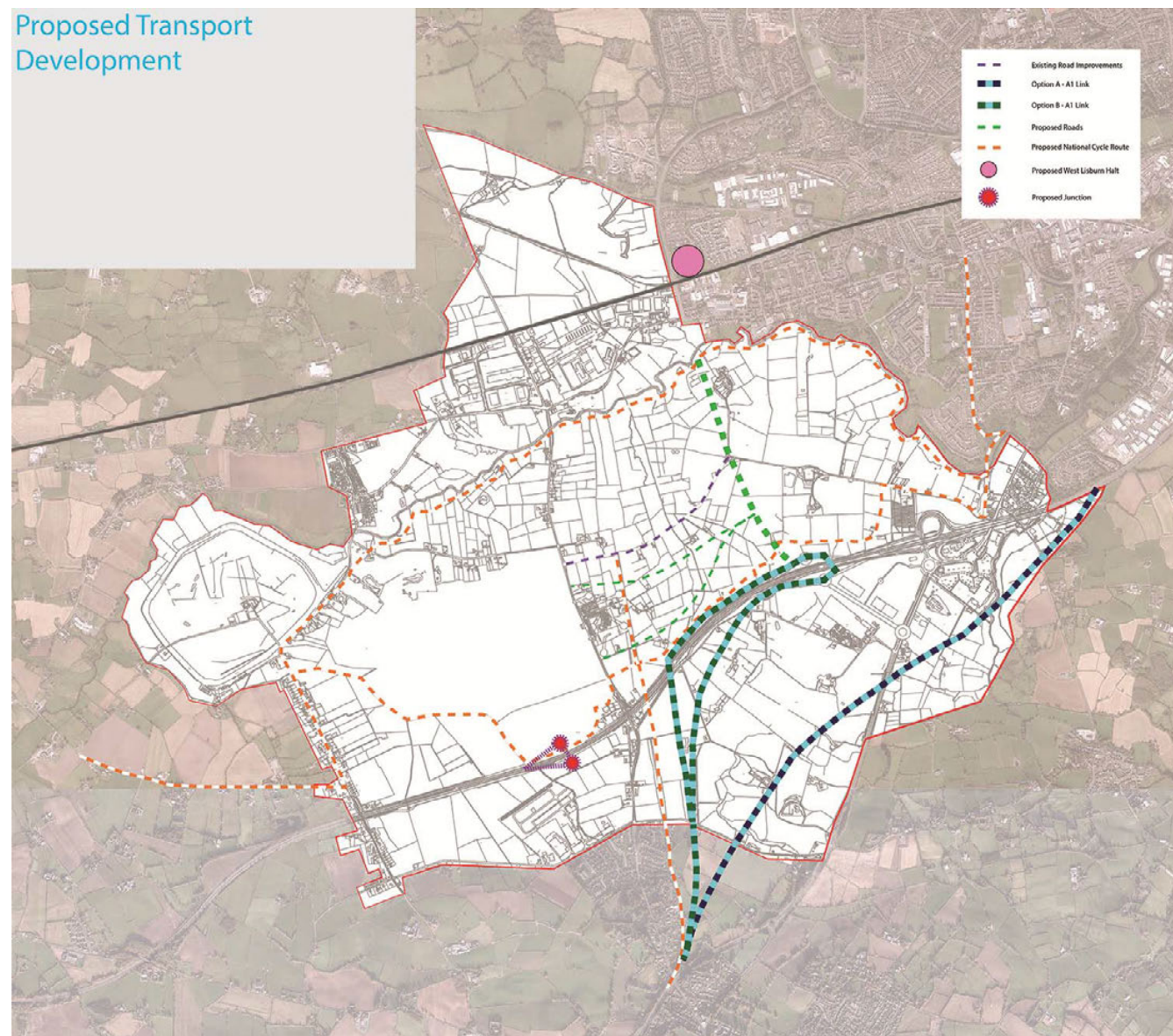


Figure (i) – existing infrastructure within study area

Current Provisions

Water supply records from NI Water indicate that there is an existing water supply network surrounding the study area of various sizes and pressures providing water to the existing development pockets. It is likely that some re-routing and extending of water supply network will be a requirement either to suit development proposals or to satisfy NI Water maintenance requirements. It does not appear that there are any significant development constraints at this point with regard to the pipe infrastructure. Capacity within the network to service development of the area will be subject to future consultation with NI Water

Based on NI Water records, there is a 250mm diameter waste water rising main leading to a 375mm diameter gravity sewer within the study area. The 250mm pumping main crosses the southern part of the site from south west to north east and onto the treatment works at New Holland. Re-routing of this rising main may be required subject to development proposals and further consultation with NI Water with respect to available capacity.

Records supplied by NIE, indicate a number of low/medium voltage NIE cables within and to the periphery of the study area serving existing small areas of development. Of significant importance to further development of the study area is the 33kV line crossing the lands in an east to west direction and running from Knockmore Road at the northern boundary to the Sprucefield PSNI Barracks on the Ravernet Road. Previous discussions have taken place with NIE to explore the potential to underground the existing cables. The route of the diversion is likely to follow the alignment of the M1-Knockmore link, located in an agreed service strip along the side of the road.

Northern Ireland as a whole has an extensive and modern telecommunications infrastructure, which includes both fixed line and radio networks. The broadband backbone network that provides the high capacity core network connecting major urban centres consists of BT's ADSL Network, NTL's Core Infrastructure, and MCI linkages. With regard to the study area, it is not expected that the core fibre and telecommunications network would pose any particular constraint to the development of the study area. Records have been sought from the relevant providers, however, the extent of the study area have kerbed the forthcoming supply of information at this stage. Further consultation will be required with the relevant providers to confirm any constraint to development.

We are currently awaiting record information from the gas supplier in Northern Ireland and cannot comment at this stage with regard to the constraints to development of the study area. It is understood however that a Bord Gais trunk main moves between Lurgan and Belfast and is likely to run in close proximity to the study area. When further detail is made available and consultation has taken place with the gas suppliers additional detail can be provided.

Future Provisions

The planned £14 million Castor Bay to Belfast Water Improvement Scheme is an essential new water pipeline, which will improve the security of the water supply infrastructure for customers in Belfast and Lisburn. The project will provide a vital new source of water coming into Belfast, which will be particularly important over the winter months and other emergency situations to supplement increased demand when the infrastructure is particularly vulnerable.

The 29km pipeline will run from Castor Bay Water Treatment Works in Craigavon to south Lisburn, where the pipeline will link into an existing trunk main to transport the water supply further into Belfast. Work is planned to commence in early Spring 2014 and will continue until Summer 2015.

The project will involve the re-commissioning of local service reservoirs that are currently out of operation, at Danescroft (Lisburn) and St Andrews (Temple); upgrading the existing Castor Bay Water Pumping Station; a new water pumping station at Sprucefield and a new water pumping station at St. Andrews Service Reservoir. There will be six major crossings involved as part of this project in 2014 which will involve work close to the following locations: M1 motorway; Lagan canal; Ravernet River (south Lisburn); A1 at Sprucefield; the Belfast-Dublin Railway Line; and the River Lagan. While the route of the water pipeline may constrain development within the study area, the benefits from additional capacity outweigh this.

It is understood, from preliminary discussions with NI Water, that capacity exists to accommodate typical wastewater discharge volumes at the New Holland Waste Water Treatment Works (WWTW). Further

consultation will be required based on pre development enquiries established when development zoning has been established. To reduce this capacity it would be expected that improved at source management and control techniques would be employed in accordance with modern best practice to ensure that unnecessary loads are not placed on the treatment works. The progressive nature of development will require ongoing consultation with NI Water. It is anticipated that some of the existing infrastructure will need to be diverted to accommodate development proposals. This is likely to follow the line of the roads infrastructure across the study area.

Given the close proximity of the 33kV distribution network, it is anticipated that extending the network to provide a power supply to the study area will not pose any significant constraint to development. Nonetheless, given that sections of the study area are likely to be sterilised for 'building development', it does not prohibit the potential for development of an 'at source' or district power generation using wind, solar or water flow, subject to ongoing consultation and design. This should align with NIE's long term plan for the transmission network, to provide a network capable of meeting the Government's 40% energy target. This includes working with development plans to encapsulate tested technologies such as wind farms.

The Tyrone to Cavan interconnector also sets to improve the supply of electricity throughout Northern Ireland and is currently progressing. Consultation with NIE will continue to ensure all constraints and feedback potential are understood and incorporated into the development framework.

As detailed above, the current telecommunications infrastructure in Northern Ireland and within easy reach of the study area is some of the best and fastest in Europe. Expanding into the site could be taken from many locations subject to development programmes with minimal impact. Consultation should be commenced early to ensure controlled development.

Natural and Built Environment

Natural Environment

A key feature of the natural environment of the study area is the River Lagan corridor, which is a significant natural resource for the area. It meanders through the northern section of the site and defines the north-eastern boundary of the study area.

However, the presence of the river and the nature of the topography in the area means that there are also significant areas of the subject lands that are affected by flooding. The river corridor and associated floodplains (1 in 100 year flood event) are illustrated in figure (ii), which shows that large parts of the study area are unlikely to be suitable for development due to the risk of flooding.

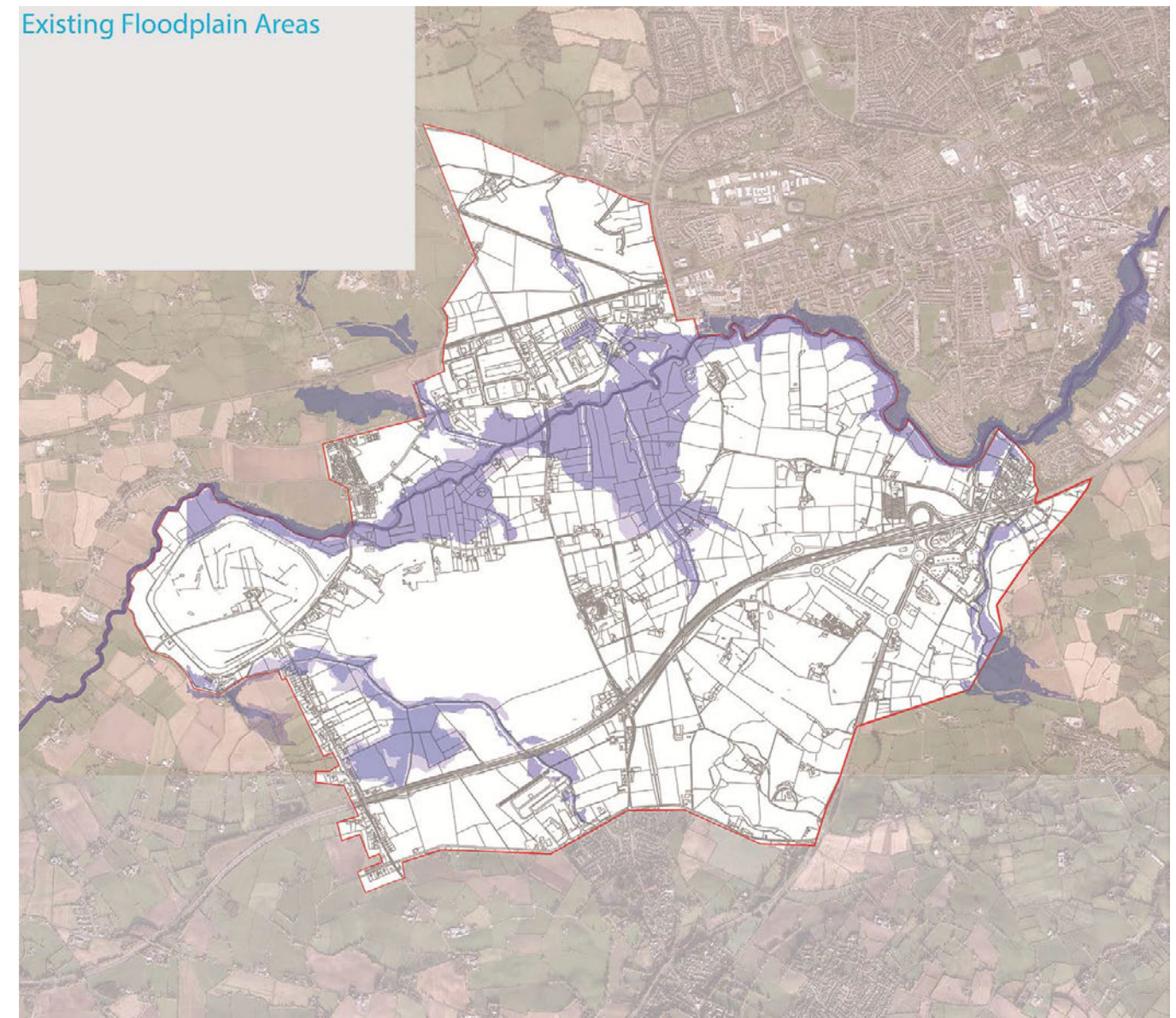


Figure (ii) – River corridor and associated floodplain area

The natural environment within the study area is of reasonably high quality and this is reflected in the large areas designated as Local Landscape Policy Area (LLPA) within BMAP. The main areas within this designation include the River Lagan Corridor, Ravarnet River corridor and around Down Royal (figure (iii)). LLPA designation does not in itself preclude development; however, development proposals within such designation must be cognisant of the special features which the LLPA is seeking to protect.

In addition to the LLPA designations, there are other high quality landscape areas within the study area which it is felt warrant further protection from unsuitable development. These areas were identified and assessed following site visits and were found to be of landscape value, for the following reasons:

- Lands bound by Harrys Road, the A1, M1 and Eglantine Road (providing enclosure and setting to the golf course and nearby listed buildings)

- Lands at Aghnatrisk Road, west of the storage and distribution warehousing (providing a good quality landscape buffer between the settlements of Culcavy and Kesh).

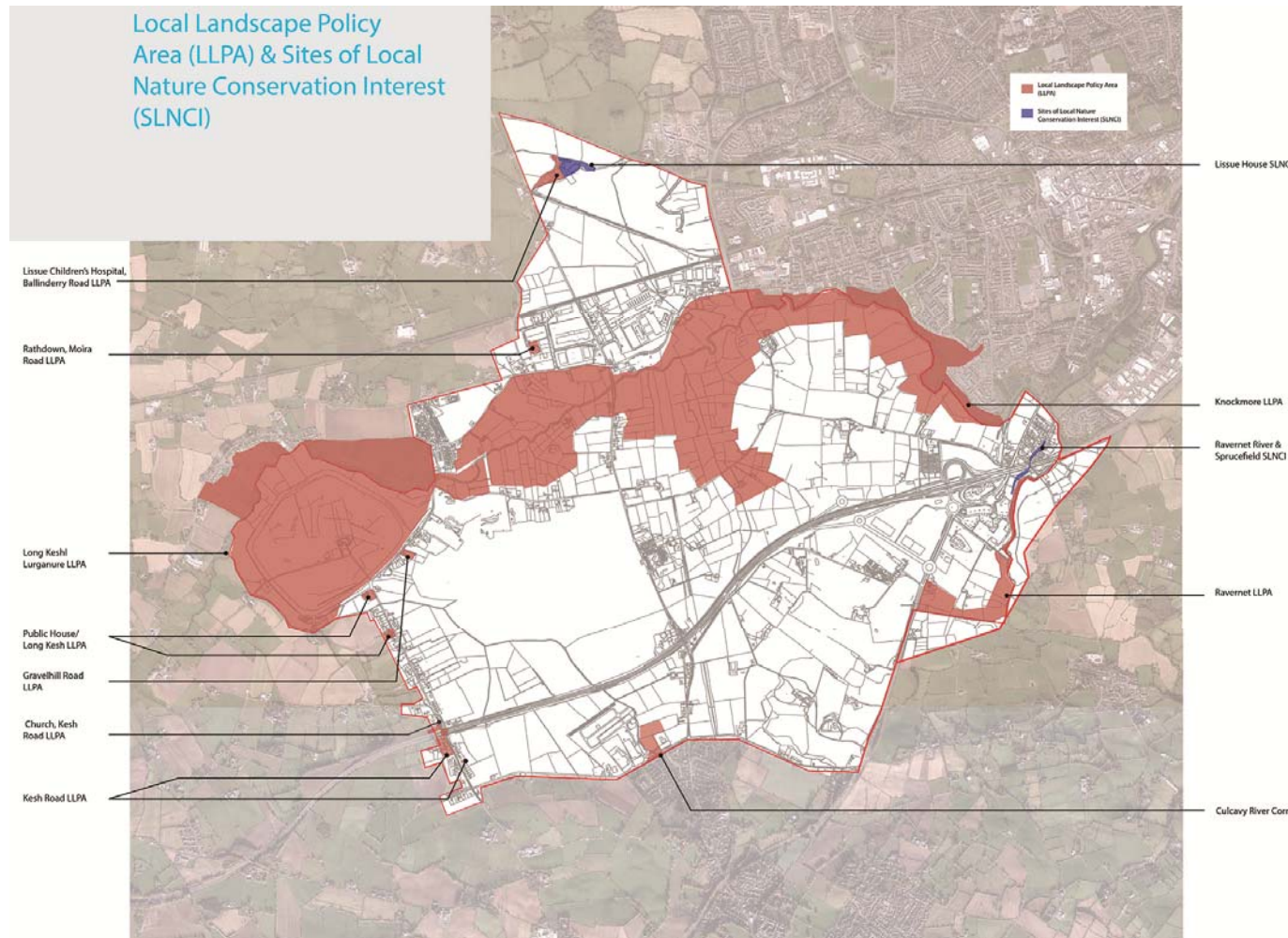


Figure (iii) – LLPAs within the study area

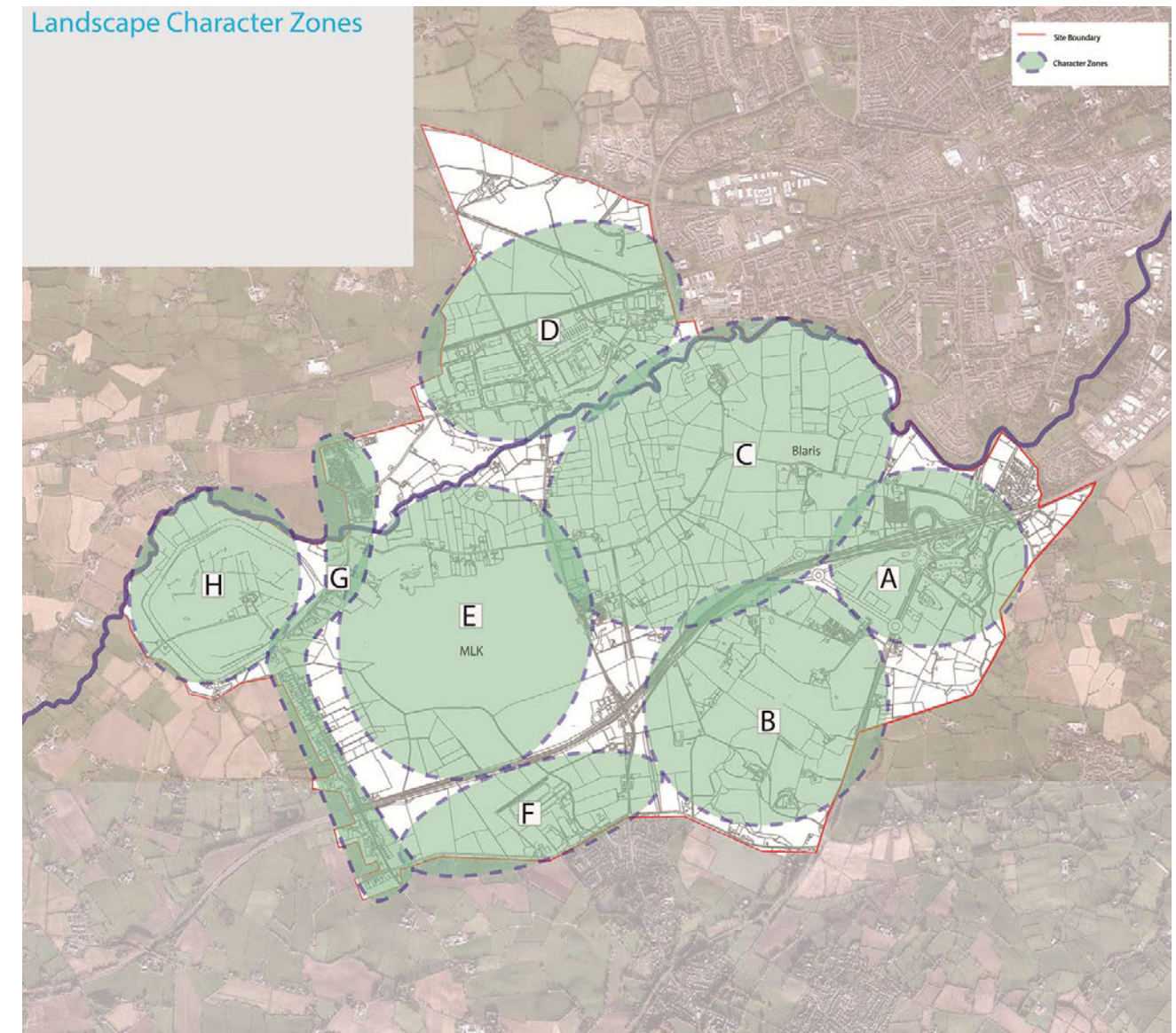


Figure (iv) – Landscape Character Zone map

The study area has been divided into a number of broad spectrum landscape character zones as shown on the Landscape Character Zone Map (figure (iv)). The character description of these zones and their sensitivity is based on a desktop study and site visit, to provide a general overview for this report and is not intended as substitute for a detailed landscape character and visual assessment nor is it intended to determine the study zones landscape sensitivity for each possible development.

Zone A: this area is a suburban retail hub visually dominated by the Sprucefield shopping units, car parking and a busy road network. The topography of the area is relatively flat and there are a number of undeveloped or post development plots exist within the zone. The zone would not be visually sensitive to developments of a retail and suburban character.

Zone B: this area is a rural agricultural landscape which is nestled between the A1 and M1 roads. The topography is generally rising with small rolling drumlins. It contains individual dwellings within an enclosed field pattern. Active recreation provision is provided at the Lisburn golf course. This zone would be visually sensitive to new development and should be protected.

Zone C: this area is a rural agricultural landscape bounded by the river Lagan, the M1 Motorway and the Halftown Road. It contains a gentle rolling topography which flattens adjacent the river. It contains individual dwellings within an enclosed field pattern with mature vegetation. This zone would generally be visually

sensitive to developments not of a rural character, though it is well-enclosed by existing vegetation, natural features and existing infrastructure.

Zone D: this area is a mixed use suburban residential, industrial and agricultural landscape bisected by railway lines. The zone would not be visually sensitive to new developments due to the existing built form within the zone a (of various character, scale and quality, and the mixed use character of area).

Zone E: this area contains a culturally sensitive historical landmark landscape at the MLK lands with buildings of a post aviation and state administration (i.e. former prison, army base and WWII infrastructure). It has an open character with short and long views into and out of the zone. There is limited vegetation within the zone and therefore, from many locations or receptors, glimpsed views and open views are possible into the centre of the zone. Due to the zone's landmark significance and its open character, it would generally be visually sensitive to development or changes of use. However, significant parcels of these lands retain evidence of built form.

Zone F: this area contains a rural landscape with industry and agriculture. The visual impact of the industrial buildings is mitigated by the good quality boundary vegetation of the adjoining fields. However, due to the scale of the buildings, they are visually prominent and dominate the character of the zone. To limit the dominance of existing industrial buildings, greater protection of good quality landscape within this area is required.

Zone G: this area contains ribbon residential development, of a low density many with mature boundary vegetation. Open and glimpsed views into the surrounding landscape maintain the zone's rural character. No notable landmark or node exists within the zone which would indicate a village centre. This zone would not generally be visually sensitive to residential or rural retail developments.

Zone H: this area contains an active recreation landscape, i.e. the Down Royal Park race course and golf club. The topography is generally flat with long open distance views along the race course and golf course. Limited buildings exist other than the buildings associated with the race course. The open nature of the zone would make it visually sensitive to development.

Built Environment

The majority of the subject lands are outside the settlement limit and as such, the built environment is limited to existing village settlements at Halftown, Maze, Long Kesh and Lurganure, small clusters of housing on Eglantine Road, Halftown Road, Culcavy Road and Bog Road and also to existing industrial areas at Lissue and Knockmore. Some built form also remains on the MLK site.

The built form within the settlements varies greatly, though they share the same characteristic of linear development along the road frontage. Halftown is characterised by high-density development, predominately social housing (figure (v)). Maze and Long Kesh contain low-medium density dwellings and there is evidence of recent residential development in these settlements, as illustrated in figure (vi).



Figure (v) – high-density, linear built form found at Halftown.



Figure (vi) – medium-low density, recent development at Long Kesh.

The existing industrial areas of Lissue and Knockmore contain typical built forms relevant to the land use, i.e. large warehousing and production buildings with ancillary car parking, open storage etc. More modern light industrial estates have been developed at Knockmore that provide modern accommodation to facilitate specialised/high-tech. operations. The new Coca-Cola bottling plant at Lissue is a noticeable feature in the landscape and epitomises modern, significant industrial buildings in the area (figure (vii)).



Figure (vii) – Coca-Cola plant near to Lissue

Despite the rural setting, the subject site includes a number of listed buildings and archaeological sites. These features are mapped in figure (viii) and the following table provides a summary of listed buildings within the study area.

LISTING REF.	ADDRESS/LOCATION	GRADE OF LISTING
HB/19/10/001	Lissue House, 31 Ballinderry Road	B1
HB/19/12/002	Moore's Bridge, Hillsborough Road	B1
HB/19/08/008	Union Locks, Hillsborough Road	B1
HB/19/08/005	Lock House, 146 Hillsborough Road	B2
HB/19/08/011	Navigation House, 148 Hillsborough Road	B1
HB/19/04/004	Shamrock Vale, 233 Hillsborough Road	B2
HB/19/04/002	Eglantine House, Harry's Road	B2 & B1 (gates)
HB/19/04/001	All Saints Church of Ireland, Eglantine Road	B+
HB/19/04/019	Newport House, 101 Culcavy Road	B2
HB/19/04/030	H Blocks, Former Maze Prison	B1 & B2

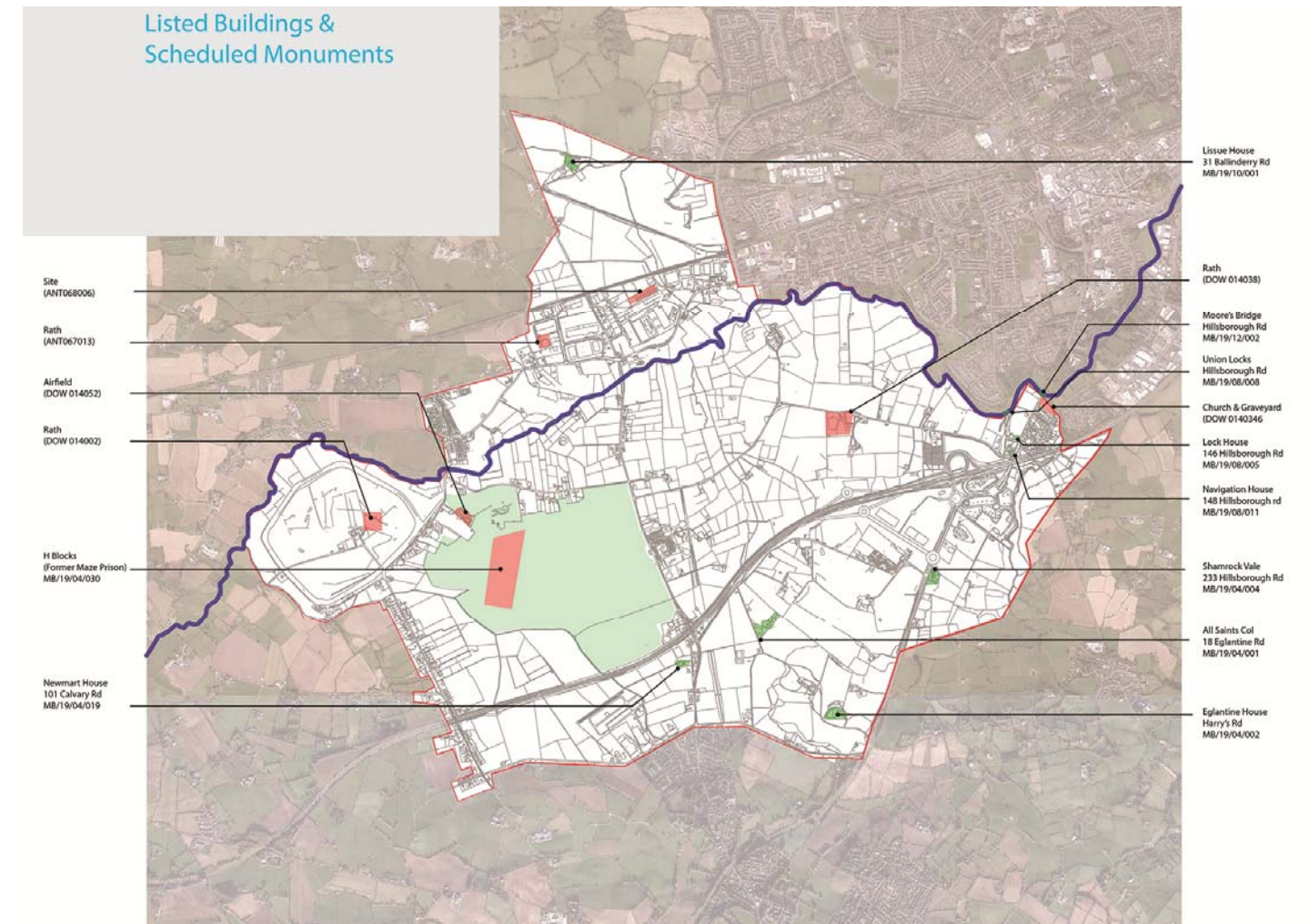


Figure (viii) – listed buildings and archaeological sites within the study area

Retail and Employment/Industry

Retail

The main area within the subject lands that has current retail activity is the Sprucefield complex. As discussed previously, it is a designated Regional Shopping Centre but its growth and development has been stunted due to overly restrictive development policies in relation to types of goods for sale and also retail floorspace allowance. Despite these restrictions, it is envisaged that Sprucefield will continue to grow as a retail centre, based on the zoned area as per BMAP.

Currently, the Sprucefield complex measures c. 37 hectares, with c. 53,000 m² of retail floorspace. It contains a number of retail outlets that range in offering or retail type from convenience/comparison goods through to bulky goods. The development and growth of the Sprucefield complex will reinforce this area as a key anchor to the wider WLDF area. The key to unlocking this growth potential is to reduce or remove the restrictive development policies and remove the limit upon types of goods for sale and retail floorspace allowance.

Employment/Industry

There are a number of industrial estates within the study area, concentrated at Knockmore and Lissue. The following table details landholding and available land for development within each industrial estate.

Industrial Estate	Landholding (Hectares)	Available Land (Hectares)
Knockmore Hill	30.35	3.31
Lissue Road	26.83	0
Aghnatrisk Road	2.84	0
Total	60.02	3.31

Alongside the current industrial land within the study area, the Blaris lands have been zoned for industrial/employment use in BMAP. These lands total 105 hectares and based on the BDFP, approximately 50% will be retained for employment uses (totalling 57 hectares). The SFMLK also proposes some employment lands as part of the overall MLK masterplan. The combined BDFP and SFMLK additional employment/industrial lands have the potential to (at least) double the existing industrial/employment land within the study area.

Feedback from Invest NI indicates that there is approximately 4 years’ supply of development land for indigenous Lisburn companies. This does not take into account emerging opportunities at either Blaris or Maze/Long Kesh. It also does not take into account potential demand from other Council areas or inward investment.

Roads and Transport

Both existing/current road and transport provision and planned future road/transport provision within the study area have been considered. Existing provision has been illustrated in figure (ix), with future planned provision in figure (x).

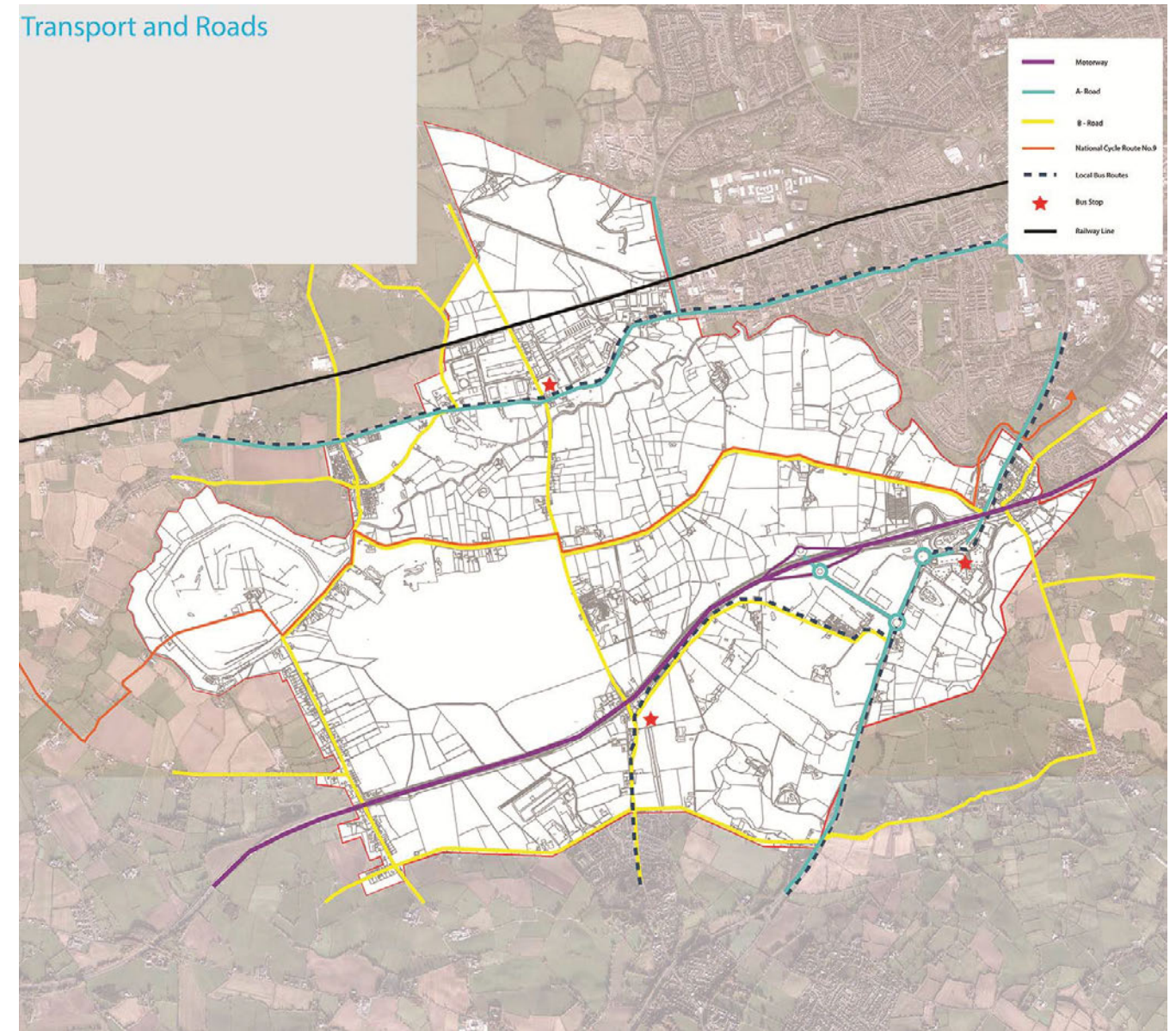


Figure (ix) – existing transport provision within study area

Existing Provision – cycling and walking

The main cycling provision in the study area is the relevant sections on the National Cycle Network (NCN). The NCN 9 runs through the study area (east-west) connecting Lisburn (at Union Loughs) to Moira. The route mainly travels along existing roads including Blaris Road, Bog Road, Gravelhill Road and Dunygarton Road. There are also some local feeder routes e.g. along Kesh Road and Cockhill Road in the west of the study area and Warren Gardens in the north east.

There are limited pedestrian facilities in the study area and this reflects its rural nature. There are sections of footway where there is development but outside of this, in the main, there are no footways.

Existing Provision – public transport

The study area is bounded or cut through by some of the main radial routes into/from Belfast, i.e. the A3, A1 and M1 and there are a number of bus services running along these routes although not all directly accessible to the study area. Services include:

- Service 51 - Belfast - Portadown (on the A3)
- Service 325G - Lisburn City Service - Hillsborough (on the A1 and Culcavy Road)
- Service X1 - Belfast – Dublin (stops at Sprucefield)
- Service 38/45 - Belfast – Banbridge – Newry (stops at Sprucefield)
- Service 238 - Belfast – Banbridge – Newry (Goldline) (stops at Sprucefield)

The Belfast to Dublin Rail line runs through the north of the study area. This carries the Enterprise service as well as the Translink local service on the Newry-Portadown-Lisburn-Belfast line. The closest station from the centre of the study area is Lisburn station which is approximately 2 kilometres away.

Existing Provision – highways

The study area is crossed by a motorway, two A roads and a number of local roads (including C roads). The M1 motorway runs between Belfast and Dungannon and dissects the south east corner of the study area and is one of the main roads in Northern Ireland. Traffic flows on the M1 in the vicinity of the study area are in the order of 36,000 vehicles per day (source: Road Service Traffic and Travel Information 2011 RST&TI).

The M1 joins with the A1 at Sprucefield. The A1 is the major route (dual carriageway) to the south of Northern Ireland and beyond to the Republic of Ireland, including Dublin. This is reflected in its daily traffic flows which are in the order of 39,000 vehicles per day.

In the northern section of the study area it is crossed in an east west direction by the A3. This is a single carriageway road that in this location connects Lisburn and Moira. Roads Service has a traffic counter on the A3 Moira Road, west of Lissue Industrial Estate, which indicates daily traffic flows in the order of 11,500 vehicles per day.

Outside of these main roads the study area is connected to them by a series of local roads. The main ones would include:

- Blaris Road (C class road);
- Halftown Road/Lissue Road (C class road);
- Bog Road; and
- Kesh Road.

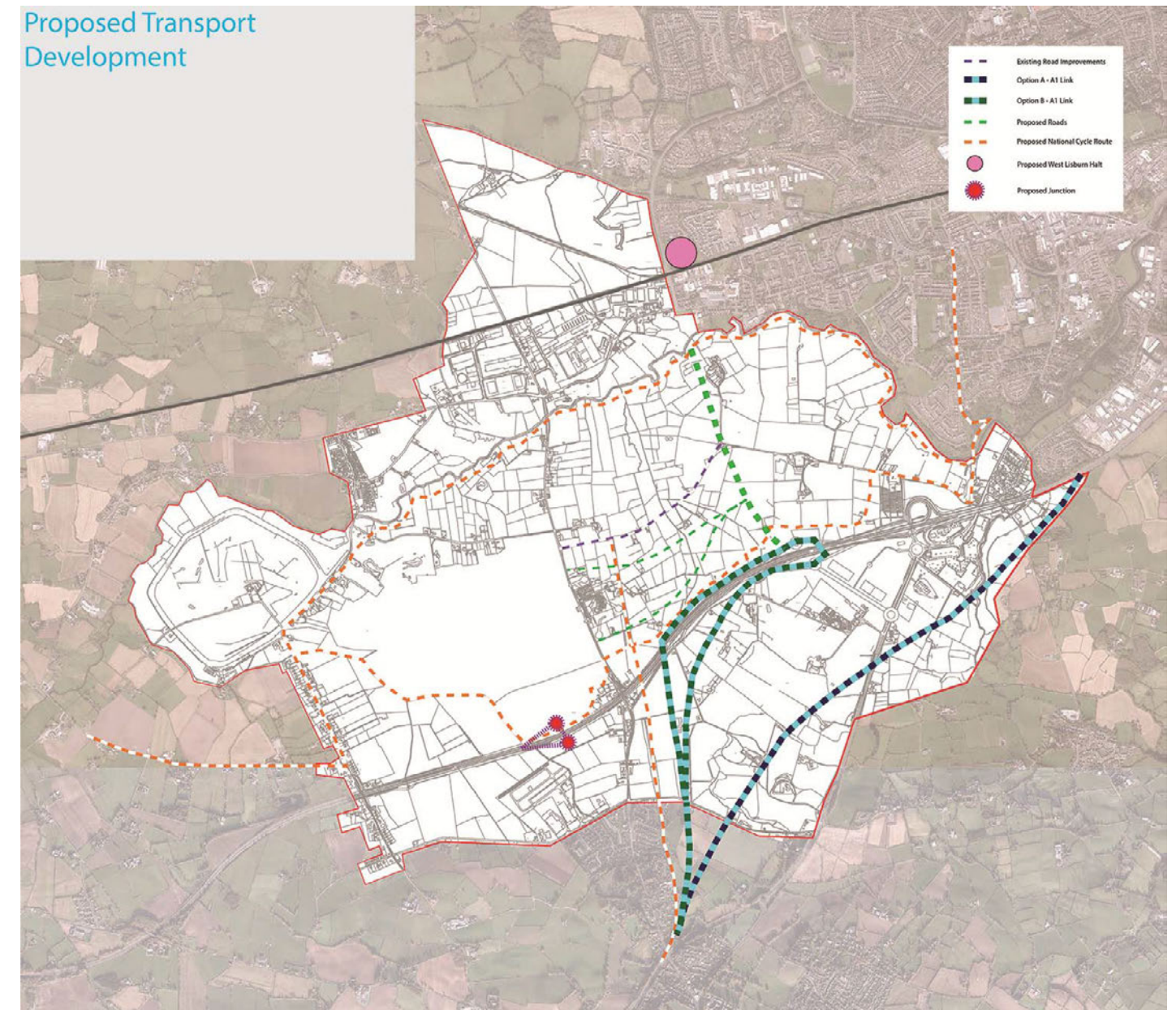


Figure (x) – future planned transport provision within study area

Future Provision – walking and cycling

In line with wider Belfast Metropolitan Transport Plan objectives of encouraging more walking and cycling, thereby reducing car dependency, a range of measures are proposed in the Plan. It suggests the development of an integrated network of Quality Walking Routes and Cycle Routes including the provision of improved links to bus and rail stations. This includes cycle route proposals from Lisburn City Centre along Moira Road and Hillsborough Road.

MLK Spatial Plan

The Maze Long Kesh (MLK) Spatial Framework - Movement Strategy contains a number of Walking and Cycling proposals and these include an internal circular route surrounding MLK site for walking and cycling. It also includes external connections to a series of shared cycleways and cycle routes. These included aspirations for new facilities along:

- River Lagan connecting to NCN9 at Union Locks
- Halftown Road
- The proposed Knockmore Link
- The proposed link between MLK site and Knockmore Link
- New route between MLK site and Sprucefield along northern side of M1 Motorway

Future Provision – public transport

Belfast Metropolitan Area Plan (BMTP) 2015 identifies that the rail halt/station at Knockmore be relocated to West Lisburn in order to provide access to the Major Employment Location at West Lisburn/Blaris and the construction of the M1 – Knockmore Link road will provide access to West Lisburn. The Belfast Metropolitan Transport Plan proposes that the existing Lisburn – Belfast services are extended to start and end from the West Lisburn station and that the Portadown service also stops there. A new stop at West Lisburn on the Belfast – Dublin Enterprise is also proposed.

The BMTP includes a number of major proposals that will further enhance Lisburn’s accessibility and support its role as a strategic growth node. This includes the provision of Park & Ride facilities at West Lisburn station, plus the provision of more parking at Lisburn station in the city centre and the development of Park & Ride opportunities at Sprucefield.

In line with wider Plan objectives to encourage greater use of public transport, a range of measures are proposed:

- improvements to local bus services and inter-urban bus services with improved frequencies on core routes supported by the introduction of bus priority measures at key junctions and in the city centre one-way system; and
- Integration of conventional fixed route local bus services with proposals for Demand Responsive Transport serving the rural areas of the BMA.

The development of park-and-ride opportunities at Sprucefield has happened but the existing Park & Ride facility is due to be relocated to the other side of the M1 Motorway. The new Sprucefield Park & Ride facility will provide 650 spaces and the aim is to be on site in August 2014 with completion by April 2015.

In addition the West Lisburn station proposals now called Lisburn West are being developed by Translink. This entails a new rail halt with bus drop off/ pick up facilities along with circa 400 Park and Ride car parking spaces.

MLK Spatial Plan

The Maze Long Kesh (MLK) Spatial Framework - Movement Strategy encourages the use of public transport. It makes provision for high quality bus corridors which can provide regular services to Lisburn City Centre where they can link with other corridors and also link with the wider area, including the M1 and A1.

Bus stops shall be located within 500 metres of the future development, with easily accessible information on routes and timetables, to make this a convenient mode of travel. The movement strategy provides the

potential for one of the two lanes of the dual carriageways to be dedicated for rapid transit and a single lane zone has been reserved along the other parts on the main axis.

Public consultation is currently underway on the options for the route of a new bus-based rapid transit and the City Council have raised the issue of the potential extension of the BRT system to Lisburn, and whether an option to link to the MLK site could be examined. This would improve access to and from the MLK site and promote an improved modal split of access to MLK away from private vehicles, and would provide an additional attractor to potential investors and developers.

A regular Rapid Transit service to MLK could in particular facilitate access to employment opportunities from areas within Lisburn and Belfast with high rates of economic inactivity and low work-mobility potential. The Rapid Transit Project Team has undertaken to liaise with MLK as part of the longer term planning process for the BRT system and the MLK site.

BMTP has plans for train station and Park & Ride and the plan has aspirations to achieve a rail station / halt in this vicinity should the opportunity arise

Future Provision – highways

Knockmore Link

A key stage of developing the entire study area is the Knockmore Link. This is a proposed major new dual carriageway connection planned to run between the North West of Lisburn and the M1 (at the existing Park and Ride site). This new link would be an attractive alternative to the Hillsborough Road route for many trips including those to and from the study area. However it should be noted that the Knockmore Link is a non-strategic road scheme. It is currently a developer led scheme and not a Roads Service scheme or included within their programme for delivery. However, the importance of this link road will necessitate a reconsideration of this approach.

BMAP 2015 advises that developers will be responsible for funding the scheme either in full or in a substantial part. Any Roads Service contribution towards the scheme will be subject to detailed economic appraisal, the availability of funding and inclusion within the major works programme. The Belfast Metropolitan Area Plan Amendment No. 1 Clarification Map No 35 shows the Road Protection Corridors for this road scheme between A2 Moira Road to the new roundabout at the M1 Motorway junction with A101 Sprucefield Link Road. Given the current economic climate it is unlikely that this will now be progressed, however, it is recognised that this link is of crucial significance to the development of the lands at MLK and the West Lisburn Development Framework and the possibility remains that part or all of the scheme could be brought forward through these plans.

M1 /A1 Link

This is a DRD Roads Service proposal and involves construction of a new motorway flyover link directly between the M1 in the Belfast direction and the A1, and the provision of a new grade separated junction serving Hillsborough. This is to effectively separate strategic traffic from local traffic at Sprucefield. The proposed scheme, which is included in the Strategic Road Improvement Programme, is to provide a high standard link dual carriageway between the M1 motorway and the A1.

Roads Service has commissioned consultants and they concluded that two options were worthy of further consideration. These were the Culcavy East route corridor and the Central route corridor. The former leaves the M1 on the western side of the A1, just to the west of the A101(M) /M1 junctions and connects to the A1 east of where it passes over Culcavy Road. The latter leaves the M1 on its eastern side and bypasses Sprucefield on its eastern side returning to the A1 at the same point as the other option having crossed the A1 south of Sprucefield. The next stage of development for the M1/A1 Link scheme will consider alternative route options within two determined route corridors, resulting in the selection of a preferred option from only one of them. However, this scheme development is not being progressed at present. Progression in the future will be subject to available funding and will be reassessed following the Government's next budget settlement, after 2015.

The Belfast Metropolitan Area Plan Amendment No. 1 Clarification Map No 10 shows the Road Protection Corridors for this road scheme and until the future of the road scheme is ultimately determined, any Protection Line in the adopted BMAP, would remain in place

MLK Spatial Framework

The Maze Long Kesh (MLK) Spatial Framework - Movement Strategy contains a number of highways proposals within the Movement Strategy and these are as follows.

- New grade separated dumbbell junction on M1 junction west of Halftown Road (access to/from west only)
- New Knockmore Link from the A3 Moira Road to the M1 Motorway/A101 at Sprucefield
- MLK site to Knockmore Link (two options one north of Halftown and one south of Halftown subject to further consultation and testing)

Other Junction improvements

The Lisburn Area Draft Plan identified a proposed housing site at Brokerstown Road/Ballinderry Road denoted as LD1. The zoning was to be the subject of amongst other things the upgrading of the Brokerstown Road and Ballinderry Road along the site frontage. The adopted Lisburn Area Plan subsequently zoned 84 hectares of land at Ballinderry Road/ Brokerstown Road/ Glenavy Road for the provision of housing and the plan required the upgrading of the Brokerstown Road and Ballinderry Road from their junction with the Knockmore Road. Subsequent Planning Applications approvals required the signalisation of the Knockmore Road/Ballinderry Road junction and also the Prince William Road/Ballymacash Road/Ballymacash Park junction, which are just outside the study area. Other junction improvements include the widening of the Prince William Road south of its junction with the Knockmore Road. It should also be noted that planning approval was granted for the development of 128 properties on Blaris Road close to the junction with Hillsborough Road. This application included necessary road works at the Hillsborough Road/Blaris Road junction. However, a new application has recently been submitted for fewer properties which may impact on the delivery of any anticipated road improvements.

Socio-Economic

Employment

The table below provides an overview of employment levels within the study area, Lisburn City and Northern Ireland level.

Percentage economically active (source: NSRA 2012)

Area	Economically Active
Study Area	71.04%
Lisburn City	70%
Northern Ireland	73.1%

Lisburn and the development zone have a lower level of economically active people than the Northern Ireland average (which already is the lowest of the 12 UK regions). This lower level of economic activity is related to the older age profile of the area, rather than unemployment. The table below compares the number, rate and change in unemployment for Lisburn when compared to both Belfast and Northern Ireland as a whole:

Analysis of Unemployment Statistics, April 2014 (source: DFP – Monthly labour Market Report, May 2014)

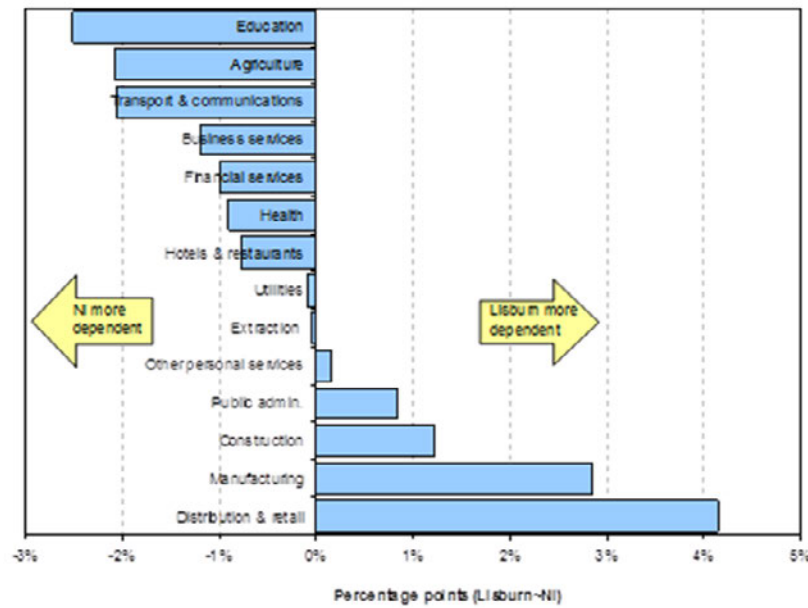
Area	Number of Claimants	Percentage of Working Age	Change over year	Jobs Density ²
Belfast	12,541	6.7%	-10.5%	1.34
Lisburn	3,040	3.9%	-16.1%	0.62
Northern Ireland	56,047	4.8%	-12.6%	0.73

Lisburn enjoyed above average employment growth up to the onset of the recession in 2008 (8.1% compared to 5.5% in the period 2004 to 2008). This was primarily fuelled by job creation in the business services, retail and construction sectors (1,200, 1,000 and 800 jobs). Since the recession, unemployment has dropped more significantly than both the Northern Ireland average and for that of Belfast. Lisburn now has an unemployment rate lower than the regional average.

However, Lisburn's jobs density figure, is significantly lower than the Northern Ireland average, illustrating that a significant number of Lisburn residents commute to elsewhere. The below graph illustrates the sectoral profile of employment across the Lisburn area, which highlights that when compared to NI as a whole, Lisburn presently has an over-reliance in construction, manufacturing, distribution and retail.

² Jobs density, total number of jobs in an area divided by the resident population of working age in the area.

Sectoral employment, comparing NI and Lisburn (source: DETI)



The following table³ measures the difference in employment by sector in Lisburn and Northern Ireland between the period 2007 to 2011.

Employment by sector (source: DETI and Oxford Economics)

	Lisburn		NI	
	000's	%	000's	%
Agriculture	0.2	14.2	4.2	12.0
Extraction	0.0	-17.3	-0.5	-24.4
Manufacturing	-0.9	-13.3	-9.2	-10.0
Utilities	0.0	-29.0	-0.6	-22.1
Construction	-0.1	-1.1	-11.6	-15.2
Distribution & retail	-0.7	-6.3	-4.0	-2.7
Hotels & restaurants	0.1	4.7	4.0	8.7
Transport & communications	0.1	9.4	1.9	5.2
Financial services	-0.1	-9.9	-1.4	-6.6
Business services	-0.4	-7.7	-5.1	-5.4
Public admin.	-0.1	-2.3	0.1	0.2
Education	0.0	1.3	2.4	3.3
Health	0.3	4.9	2.0	1.6
Other personal services	0.1	4.2	1.9	4.4
Total	-1.5	-2.9	-19.0	-2.2

Skills

Data from the Labour Force Survey shows that Lisburn has the 5th lowest proportion of the working age population with no qualification, outperforming the Northern Ireland average. Lisburn has the 5th highest proportion of its working age population in Northern Ireland qualified at NVQ4.

A review of the skills profile of Lisburn illustrates that the city compares favourably in terms of both Northern Ireland (where it is in fifth place of all local authorities), which in turn compares well against the UK average. In addition, the high economic activity rate and a high percentage of employees in the manufacturing and distribution sectors illustrates a workforce which has a high level of technical competency.

³This table simply reflects the percentage change in those employed in the Lisburn area, it does not measure the sectoral change for those who work in other district council areas.

Level of Social and Environmental Deprivation

The following section has been derived by aggregating deprivation statistics for the three wards in the West Lisburn area. The table below compares the West Lisburn area to the Northern Ireland average.

Comparison of Social and Environmental Deprivation, 2011 (source: NINIS)

Indicator	West Lisburn	Northern Ireland
Median age at death	79	80
Households in relative poverty	15.8%	17.0%
Car registered to a disabled person (%)	7.8%	8.4%
Owner occupied households	63%	67%

The table illustrates that the area is marginally below the Northern Ireland average against each of the four headings. However, this reflects the higher incidence of elderly (rather than unemployed) within the local population compared to Northern Ireland as a whole. As noted above, for those in full time employment, income levels in Lisburn are slightly higher than the Northern Ireland average.

The Business Environment

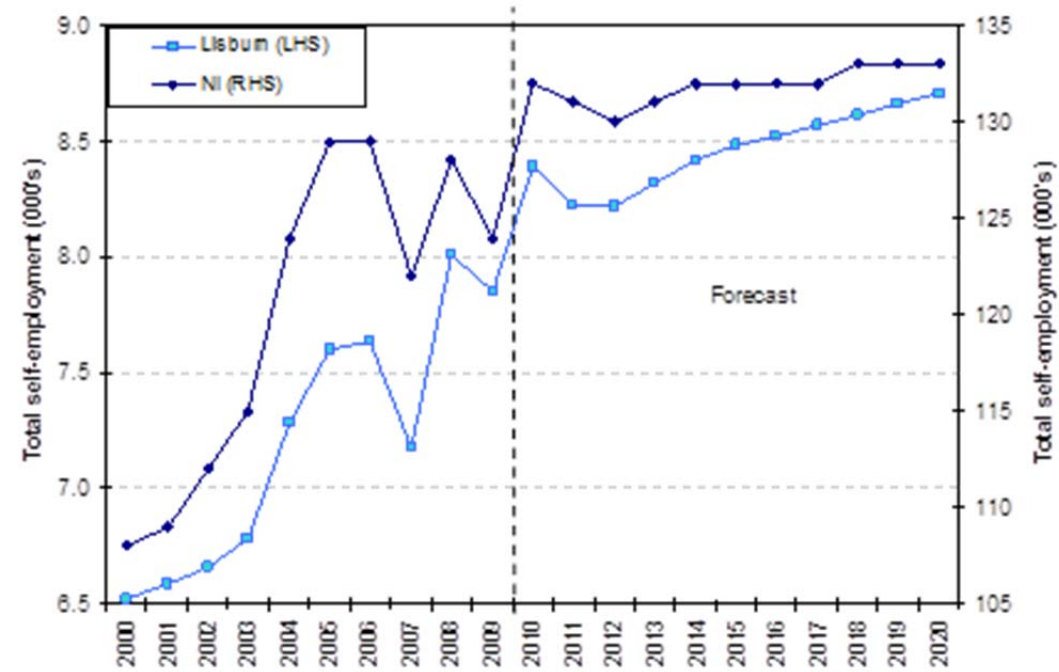
As was noted in the strategic review, there are a number of key sectors (including Life and Health Sciences, Agri-food, Advanced Materials and Advanced Engineering) in which Northern Ireland has a distinct advantage and in which there is a significant potential for growth. Within this section we will review the local composition of businesses to assess their complementarity with these growth sectors and to also assess the opportunities for local business start-up and survival rates.

In 2012, according to the Interdepartmental Business Register, Lisburn had 3,725 VAT registered companies; this amounted to 5.5% of the total registrations for Northern Ireland. 2,700 of the 3,725 VAT businesses in the Lisburn area were classified as being micro (i.e. less than 5 employees). There were 15 large companies (those employing over 250 employees), principally in distribution and light manufacturing. Lisburn City Council is second only to Belfast (70 large companies) for the concentration of large companies.

Business Start Up Rates

The following graph illustrates the level of business start-ups until 2019.

Business Start/Self Employment (source: DETI)



The graph above illustrates an increasing convergence with the NI business start-up rate. Looking ahead, total self-employment is expected to rise over the next decade, particularly in the construction and service sectors. Consultation with Invest NI confirmed that most of these businesses would operate from home and of those which would need commercial premises, could be accommodated within the existing provision.

Sectoral Composition

The below table compares the sectoral employment concentrations between Lisburn and Northern Ireland.

Sectoral Employment Concentrations (source: Oxford Economics)

	LQ 2009	% total employment in Lisburn	% total employment in NI
Construction	1.58	8.25	5.22
Retail & distribution	1.27	23.00	18.07
Manufacturing	1.23	13.02	10.55
Public admin	1.06	8.74	8.28
Other personal services	1.02	4.82	4.74
Health	0.97	16.05	16.51
Business services	0.85	9.01	10.65
Hotels & restaurants	0.84	5.09	6.04
Extraction	0.82	0.22	0.27
Education	0.68	6.93	10.20
Agriculture	0.62	1.05	1.70
Utilities	0.59	0.16	0.27
Transport & comms	0.54	2.26	4.21
Financial intermediation	0.51	1.39	2.71

As was noted earlier, the table confirms the employment concentration within Lisburn and zone in terms of construction, retail and distribution, manufacturing and public administration. There is however a significant under representation in the target sectors identified in the Northern Ireland Economic Strategy of Agri-foods, advanced materials, advanced engineering and life and health sciences.

3.7 Sport/Leisure and Tourism

The major sports and leisure assets within the study area include the Down Royal Racecourse and golf courses at the top of Kesh Road, Lisburn Golf Course and Lisburn Rugby and Hockey Club, both located on Eglantine Road.

Cycle/walking paths also exist along the River Lagan, but this network currently ends at Union Locks (Blaris Road) and no formal cycle and walking routes exist within the study area.

APPENDIX 4 Summary table of responses (draft zoning plan)

Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
Maze Long Kesh Development Corporation	11.11.14 (presentation)	<ul style="list-style-type: none"> - Linked up approach required between LCC, DSD, DRD and DoE in relation to taking WLFP forward and realising its potential. - Key issue regarding delivery is the need for public sector funding, especially for Knockmore Link Road. - Potential to link new Knockmore rail halt into the Antrim line and thereby connect to BIA. This will increase regional connectivity. - Potential also to demonstrate wider transport connections (i.e. ferries, airports and rail links). - Potential to link into proposed Belfast Rapid Transit system (currently proposed to stop at Poleglass). 	<ul style="list-style-type: none"> - Need for joined up public sector approach and funding. - Need to demonstrate wider potential linkages and connections, especially re: transport. 	<ul style="list-style-type: none"> - Inclusion of public sector bodies and their roles in Action Plan. - Regional context of WLDF included.
	24.11.14 (email/report)	<ul style="list-style-type: none"> - Enthusiastically welcome work so far and are supportive, on the basis that MLK has own stand along spatial framework. - Precautionary point suggesting that a checks and balances procedure is adopted throughout evolution process to ensure potential legal challenges are avoided. - More emphasis needed on how the impact of the plan stretches to a more regional dynamic, how study area connects to wider region and what elements are of Regional Significance. - Consideration of outputs of the West Lisburn Plan on potential cross council boundary issue, potential conflict should be considered and mitigated. - Ask that MLK continues its involvement as a steering group member, this will help to co-ordinated single vision. - Agree priority should be given to entire delivery of Knockmore link – most important priority of Plan and resource should be dedicated to ensure procurement by Public Sector to stimulate further developments and jobs - Reference should be made to the importance of linking the study area with major transport nodes such BIA and ports. - Note the MLK designation as per RDS; MLK site should be considered as “Top Tier” development asset therefore this designation needs to stand alone and independent from rest of plan area. Enterprise Zone status for MLK would benefit study area and we welcome further involvement in this important aspect. - Unique physical aspects of study area enable potential to create linkages in form of walkways and cycle ways. - Further thinking in the process required on the principles of Civic Stewardship philosophies to enable full benefit of community engagement. - Suggested explanation on what actually is the first and second phase of Knockmore Link. 	<ul style="list-style-type: none"> - Need more emphasis on the impact of the plan regionally. - Adopt checks and balances procedure - Retain priority given to delivery of Knockmore Link. - Need to reference important link study area has to major transport nodes e.g. Belfast International Airport, ports etc. - Reinforce influence of improved linkages due to new pathways and cycle paths. 	<ul style="list-style-type: none"> - Regional context for WLDF included. - Review period of plan set out in Action Plan. - Knockmore Link retained as 1st objective. - Greater promotion of alternative modes of transport linkages throughout WLDF.
Lagan Canal Trust (Brenda Turnbull)	11.11.14 (email)	<ul style="list-style-type: none"> - Confirmed that free visitor’s guide for the Lagan Corridor has been updated to ‘The Lagan Navigation Walking Guide’. - Confirmed that the Lagan Canal trust has submitted its Outline Business Case to government (September 2014) re: the reopening of the Lagan Navigation from Belfast Lough to Lough Neagh. 	<ul style="list-style-type: none"> - Plan to reflect latest developments re: Lagan Navigation. 	<ul style="list-style-type: none"> - Natural Environment and Leisure/Sport/Tourism objectives focus on River Lagan and opportunity to link future strategies with Lagan Canal Trust projects.

Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
Down Royal Racecourse (Mike Todd)	14.11.14 (email)	- Welcomed designation of racecourse as major recreational asset.	- Retain recreation designation.	- Recreation designation retained.
Stephen Thornton (Land owner)	18.11.14 (email)	- Welcomed the zonings and designations that relate to Blaris lands.	- Retain Blaris lands zonings and designations.	- Designations and zonings in WLDF broadly reflect Blaris masterplan.
Transport NI	20.11.14 (email)	- Need more time to consider content and implications of certain aspects contained within the development plan.	- No issues/implications as of yet to plan.	- Wider consultation possible at detailed local plan stage.
NIEA (HMU)	21.11.14 (email)	- Request for boundary of West Lisburn Development Framework Study Area in a GIS format, would help to speed up analysis	- No issues/implications as of yet to plan	- Wider and more detailed consultation possible at detailed local plan stage.
Outdoor Recreation NI (Diane Crookes)	21.11.14 (email)	- Regional Scoping Study for MLK was completed in 2012 by Outdoor Recreation NI; the purpose was to design a sustainable off-road non bitmac multi use trail system within MLK site. - Would welcome any upgrade to existing Lagan canal Towpath. Investigations into extending the Towpath should be explored. - Lagan Towpath currently advertised as ending at Civic Centre in Lisburn due to unsatisfactory finishing point at Blaris Road. - Community Trail Networks should be explored and incorporated into any proposal developments in West Lisburn Area. "Toolkit to develop community trail networks" currently being developed by Outdoor Recreation NI communities could all be connected through a successful community trail network. - "Lagan Navigation Outdoor Recreation Audit" suggests recommendations for the development of the Lagan River and Canal in the vicinity of Union Locks and Maze Long Kesh. - Lagan Valley Trust should be contacted to view these recommendations.	- Potentially incorporate community trail systems into plan. - Retain potential nodes for berths/slip ways & incorporate extension to Lagan canal towpath	- Proposed network of pedestrian and cycle routes can be integrated with or used as a community trail. - River-based activity nodes retained.
William Briggs (Land owner)	21.11.14 (email)	- Require clarification with references to impact if any that framework will have on his land 1 Derrynahone Road, Broomhedge. - If possible require details of proposals close to Derrynahone/Robbery Road area	- Provide feedback to landowner regarding impact on land (far enough away).	- Broomhedge outside study area. No further action.
Phoenix Gas	24.11.14 (email)	- Unable to download large file, request to collect a copy at the office and have a quick brief on the developments.	- No issues/implications as of yet to plan.	- No further response. No further action.
GSNI	25.11.14 (email)	- Highlighted that there is no mention of significant resource availability – i.e. groundwater. - Sherwood Sandstone aquifer has huge productivity potential/high quality, already tapped by Coca Cola. - Presence of sustainable groundwater supply potentially a major economic benefit, fitting in well with objective 3. - Presence of groundwater could attract clusters of related businesses dependant on high water volume (related to objective 4). - groundwater could be beneficial to objective 5, as an attractive prospect for developers. - Geological Survey of NI provides more detailed info if required.	- Potential to exploit natural resources (i.e. groundwater) as a significant resource in the area; could influence objective 3, 4 and 5.	- Scope for exploitation of natural resources when infrastructure improvements are considered (see activity 3(b) in Action Plan).

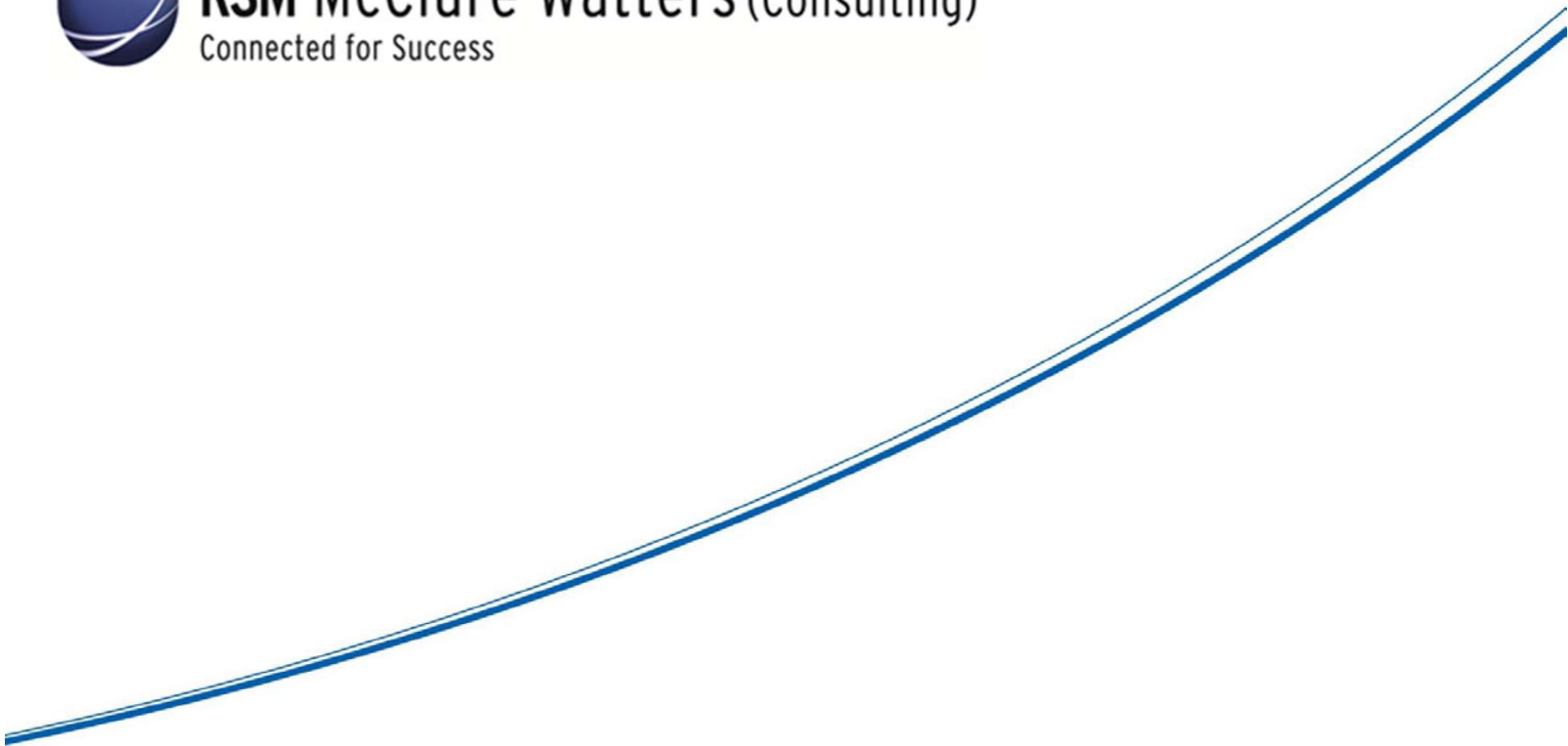
Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
Ulster Angling (Gary Houston)	25.11.14 (email)	<ul style="list-style-type: none"> - Agree with idea to extend cycle path up Lagan to the Maze site, could be linked to access for angling stands and slipways. - Facilities need to be included at nodes such as bike hire, toilet facilities and catering. - Strategic Review of angling identified need for strategic fisheries with facilities to cater for young/disabled. - Plan could severely damage the habitat and fish populations of the River Lagan and fishery. - Passage to Maze would require dredging, removal of meanders and raising Hoggs Weir, the river would no longer be a narrow, fast flowing salmonid river but essentially a canal with very different assemblage of species. - Damage of the population of species would lead to reduction in waterbody status, illegal under Water Framework Directive. - Constant boat traffic would further degrade waterbody status. - Project for river modification threatens habitat required for juvenile salmon (protected species, under the Habitats Directive in NI). - There is no business case for canal, boating docks and marinas. - A walk/cycle path would be a major asset for the city. 	<ul style="list-style-type: none"> - Retain idea to extend cycle path up to Lagan Maze Site – major asset for city. - Elements of plan could have severe impact on River Lagan need to reconsider reopening of the river as a navigational waterway. 	<ul style="list-style-type: none"> - Integrated pedestrian and cycle routes retained in WLDF. - Further EIAs and/or SEA's required for potential development proposals on/close to river.
Rivers Agency (1)	26.11.14 (email)	<ul style="list-style-type: none"> - A number of designated watercourses are located in proposed area, if proposed works include measures that would affect any watercourse, schedule 6 permissions may be required. - Specific interest in ensuring that any works impacting on water environment take note of best practice, appropriate early design will help reduce the impact of works. - Suggested useful documents SEPA and CIRIA attached within email. 	<ul style="list-style-type: none"> - Determine impact on any watercourse and access schedule 6 permissions if required. - Follow best practice guides to reduce impact of works. 	<ul style="list-style-type: none"> - Further EIAs and/or SEA's required for potential development proposals on/close to river.
Arquiva (Nigel Bishop)	26.11.14 (email)	<ul style="list-style-type: none"> - Support the inclusion of site as proposed in plan. - Suggested amendment to wording of radio broadcast site and surrounding lands, to make allowance for envisaged electronic communications purposes. 	<ul style="list-style-type: none"> - Retain inclusion of site in proposed plan. - amend wording of zoning WL17. 	<ul style="list-style-type: none"> - Designation within retail designation retained and 'complementary uses' to retail allowed, which could include electronic communication. - Electronic communication existing use on site.
Rivers Agency (2)	27.11.14 (email)	<ul style="list-style-type: none"> - Advise to ensure that the preparation of the Development Framework Plan is not contrary to Planning NI's Revised PPS 15. - Flood Maps (NI) should be accessed to acquire info. regarding flooding in the area. - This is a Strategic level response & does not negate onus on Lisburn City Council to further consult regarding individual zoning levels. 	<ul style="list-style-type: none"> - Need to ensure Plan is abiding to the revised PPS 15. 	<ul style="list-style-type: none"> - Flood Risk Assessments required (where necessary) for any future detailed development proposal.
Lisburn Rugby Football Club (Gary King)	27.11.14 (email)	<ul style="list-style-type: none"> - Highlight that access/egress to their grounds are currently a major problem and proposals from masterplan would only make this worse. - Identify proposed one way system exiting grounds and entering onto A1, which is to be developed as part of Translink Park and Ride facility, would be a solution to problem. 	<ul style="list-style-type: none"> - Potential to link park and ride facility with rugby club to alleviate access issues. 	<ul style="list-style-type: none"> - Permission already granted for relocated Park & Ride facility (S/2010/0431/F). No through road shown. - Any access would have to be agreed with Roads Service/Translink.

Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
Johnathan Leathern (landowner)	28.11.14 (letter)	<ul style="list-style-type: none"> - Proposed development lands at Sprucefield and Blaris is using some of the best agricultural land in NI. - More use should be made of brownfield sites for housing/retail/employment such as lands a MLK, Maghaberry and old airfield at Nutts Corner; all these sites have access to main roads and M1. - Further expansion will lead to Lisburn city centre becoming a ghost town. - Blaris is a natural green landscape boundary of land and should therefore be retained. - Queries the need to move the industrial storage and distribution site at Aghnatrisk Rd to Blaris, as there is a new junction planned on the M1 at the MLK to the rear of the current site, providing a linkage. - States that there appears to be little planned for the MLK site. 	<ul style="list-style-type: none"> - Queries regarding land-use zonings. 	<ul style="list-style-type: none"> - Principle of appropriate development at both Blaris and MLK previously accepted via masterplans. - Protection of high value landscapes via the proposed Rural Landscape Wedge in the WLDF.
Desmond Eastwood (Eastwood Motors)	28.11.14 (letter)	<ul style="list-style-type: none"> - Submitted planning appeal commission papers article 7, main points include; recommends that the site is included within the settlement limit, the floodplain of the River Lagan within the site should be identified by the Department and zoned as an extension of open space zoning LC37. The remainder of the site should be unzoned. 	<ul style="list-style-type: none"> - Specific requests in relation to owned land. - Seeking inclusion within Settlement Limit. 	<ul style="list-style-type: none"> - Part of site in question included within settlement limit but portion within floodplain to form part of Rural Landscape Wedge.
DARD	28.11.14 (email)	<ul style="list-style-type: none"> - Forest Service has no issue. - DARD Fisheries: no issues or concerns from aquaculture aspect. - Quality Assurance Branch records show PCN (Potato Cyst Nematode) infestation in the area; these areas are subject to of a notice which prohibits movement of soil or other material from these lands except under licence. 	<ul style="list-style-type: none"> - Issue re: PCN can be controlled at development proposal stage. 	<ul style="list-style-type: none"> - No further action required.
DETI (Energy Co-ordinator)	28.11.14 (email)	<ul style="list-style-type: none"> - No comment to make with regards to plan 	<ul style="list-style-type: none"> - No issues or implications. 	<ul style="list-style-type: none"> - No further action required.
LAGANS RIVER TRUST (Trevor Osborn)	28.11.14 (email)	<ul style="list-style-type: none"> - Requested meeting due to importance of river to plan and potential destruction which may be caused. - Potential for development within study area to breach conditions within the EU Water Framework Directive and Habitats Directive. - Commend plan and fully supports greater access for walkers/cyclists. - Concerned about lack of waste water treatment infrastructure as development grows and potential for over-capacity of New Holland will lead to over capacity and subsequent pollution. - River is not suitable for powered boats, marinas therefore not viable. - Water quality currently poor to moderate and development near river could cause decline. - More viable to dig a new canal to run close to old route (now occupied by motorway), than to destroy river for less useful route. This route would better service Sprucefield and Maze site. 	<ul style="list-style-type: none"> - EU Water Framework Directive and Habitats Directive considered at development proposal stage. - Potential re-routing of canal. 	<ul style="list-style-type: none"> - Further EIAs and/or SEA's required for potential development proposals on/close to river.
LAW TRANSPORT (Esther Law)	28.11.14 (email)	<ul style="list-style-type: none"> - Express interest in Plan, due to transport company and other business in yard at 18 Aghnatrick Rd., Hillsborough. - Interested in being included in plans to build new houses. Current housing zoning at Culcavy runs up to the boundary of their business. - Wish to discuss further. 	<ul style="list-style-type: none"> - Consider inclusion of lands to housing zoning. 	<ul style="list-style-type: none"> - Zoning Plan updated to include relocation of existing storage yard into Blaris, as part of redevelopment of Culcavy.

Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
NIEA NH (Mark Hammond)	28.11.14 (email)	<ul style="list-style-type: none"> - Unsure of status of document therefore comments are made without prejudice to any future consultation responses which may be made to forthcoming. - Suggest a number of best practice documents which reference should be made to; Landscape Character Assessment, Green Infrastructure and Place-making. - Welcome objective to protect and enhance significant and valuable landscape areas and waterways. - LCA will inform existence of significant and valuable landscape areas and sure soundness of the detailed plan, reference to objective 6. - LLPA's have been shown separately on plan, they have been included in Figure 3 but do not appear in Key, should be included. - Proposed LLPA's appear to exclude a valuable tree group, identified within LLPA, (LC05, BMAP) would be merit in including tree group in LLPA. - Note that aim of framework is to take actions to reduce carbon footprint and facilitate adaption to climate change, no further indication as to how this will be achieved – more detail needed perhaps. - Note that Habitats Regulation Assessment has not been provided with WLDF consultation, advise that Lisburn City Council should consider if assessment is required and consult NIEA (DoE) as appropriate. - Note SEA has not been varied out for WLDP, advises that Lisburn City Council should have justification for not carrying out such assessment. 	<ul style="list-style-type: none"> - Reference best practice documents LCA, Green Infrastructure and Place-making. - Retain objective 6. - Review figure 3 key to include LLPA. - Include LC05 (valuable tree group) in designation in LLPA. - Plan not to be a statutory plan and therefore no need for SEA or HRA. 	<ul style="list-style-type: none"> - Objective 6 retained. - LLPA clarification plan included in document. Kept separate from main Zoning Plan as could lead to confusion. - Clarification re: status of document and need for future SEA etc. provided in document.
INTU PROPERTIES (Brian Kelly)	28.11.14 (email)	<ul style="list-style-type: none"> - The framework can justifiably adopt the independent findings of the PAC in respect of Sprucefield RSC - The WLDF appropriately reflects the regional policy status for Sprucefield. - The WLDF and subsequent LDP will provide certainty for Sprucefield RSC for the first time in over 10 years - WDLF makes no attempt to reinterpret long standing regional planning policy for Sprucefield. - Supports objective 7 of the Plan, is essential element of overall economic strategy for West Lisburn Area. - Supports inclusion of radio broadcast site is in line with LC16 of BMAP, suggests that to ensure appropriate phasing and timing of development in this area, land to the east of the A1 that does not benefit from an extant planning consent should only be considered for further retail or complementary uses once the existing Sprucefield site to the west of the A1 is developed out. 	<ul style="list-style-type: none"> - Retain objective 7 of the plan. - Retain inclusion of radio broadcast site in proposed plan. 	<ul style="list-style-type: none"> - Objective 7 retained. - Radio broadcast site included in retail (and other suitable uses) zoning.
INVEST NI (Mark Latimer)	03.12.14 (email)	<ul style="list-style-type: none"> - Welcomes and is supportive of Framework's proposals. - States that planning plays key role in facilitating economic development and welcomes production of plan in this context. - Highlights importance of providing a choice and variety of sites to respond to the changing nature of business and industry and notes different requirements of the manufacturing, services and software sectors are considered in framework. - Lisburn is most attractive location for manufacturing investment and this plans proposals will ensure that this remains. 	<ul style="list-style-type: none"> - No issues/implications to plan. 	<ul style="list-style-type: none"> - No further action required.

Consultee/Stakeholder	Response Date	Response/Meeting Summary	Key Issues	Consideration and Implication for Framework
<p>RSPB (Michelle Hill)</p>	<p>05.12.14 (email)</p>	<ul style="list-style-type: none"> - Reiterate concerns over time period which has been set aside for consultation. - Concerns as to whether consultation methods are sufficient, as there is no public consultation stage. - Request clarification of the powers under which the document is being prepared, unclear of status of document and weight attributed to it. - Highlight prematurity and prejudice to the LDP process. - Suggest RDS should have been given prominence in the process. - Expected to see NI Biodiversity Strategy and NI Sustainable Development Strategy listed in the document review. - Consider plan vision (2.1) to be obvious in content, rather than setting out how the plan would actually improve area. - Strategic Objectives could also be strengthened particularly 3 & 5 as they are too vague and almost meaningless. - Not clear where evidence has come from to validate the assertions set out in the Plan Strategy, suggest expansion or clarification. - Knockmore Link Road (3.1) & Infrastructure and Transport (3.2) are confirming detailed proposals and designations, should refrain in order to not compromise future LDP. - Employment section (3.3) – evidence that supports scenarios outlined should be available for consideration. - Plan vision (2.1) has diluted references to the environment, it fails to acknowledge the role that the environment and ecosystems can have in achieving sustainable development. - Objective 6 outline in (2.2) is considered weak in comparison to other objectives, should be strengthened in accordance with the principles of sustainable development. - It is not clear how the Framework Plan in its current form, promotes sustainable development or has it at its heart. - Framework fails to address the ability to improve health and wellbeing through a connection with nature and green spaces. - Welcome protection of river corridor and landscape areas within the framework development, does not go far enough in recognising the environmental benefits of green spaces as habitats for wildlife, and wellbeing through wildlife. - Framework should recognise the ability of the river corridor, recognition for particular functions require precedence e.g. some species require undisturbed habitat. - Need for plan area/district to be looked at holistically over the plan period – growth and development requirements need to be assessed in the round and not on an ad hoc basis, in this regard need for new greenfield development needs to be assessed in the context of what available context there already is within urban footprint to accommodate growth projected over plan period. - Land is a finite resource and should be viewed in this context when plan making. - Given nature of document RSPB expect it to be accompanied by SEA. 	<ul style="list-style-type: none"> - Strengthen Plan vision, objectives and strategy - Consider public consultation - Review NI Biodiversity Strategy, NI Sustainable Development Strategy and UK National Ecosystem Assessment: Technical Report. - Include Strategic Environmental Assessment with document 	<ul style="list-style-type: none"> - Status of plan fully explained and potential for future consultation as part of Local Development Plans.
<p>Sustrans (Gordon Clarke)</p>	<p>08.12.14 (email)</p>	<ul style="list-style-type: none"> - Would like to see great emphasis on ‘active travel’ within the document with walking and cycling embedded in all aspects of land-use zoning. - states that flat topography, river corridor and existing motorway and railway offer an ideal framework for this approach. - States that opportunity does not exist to create a mode of sustainable development. 		<ul style="list-style-type: none"> - Better linkages for alternative modes of transport included in document (i.e. linked pedestrian and cycle route).

APPENDIX 5 Socio-economic Review of West Lisburn (RSM McClure Watters)



Strategic Planning

West Lisburn Development Framework

Socio Economic Review

1.0 INTRODUCTION

RSM McClure Watters has been appointed by Strategic Planning Limited to undertake the economic analysis of the West Lisburn Development Framework on behalf of Lisburn City Council.

1.1 Terms of Reference and Scope of This Report

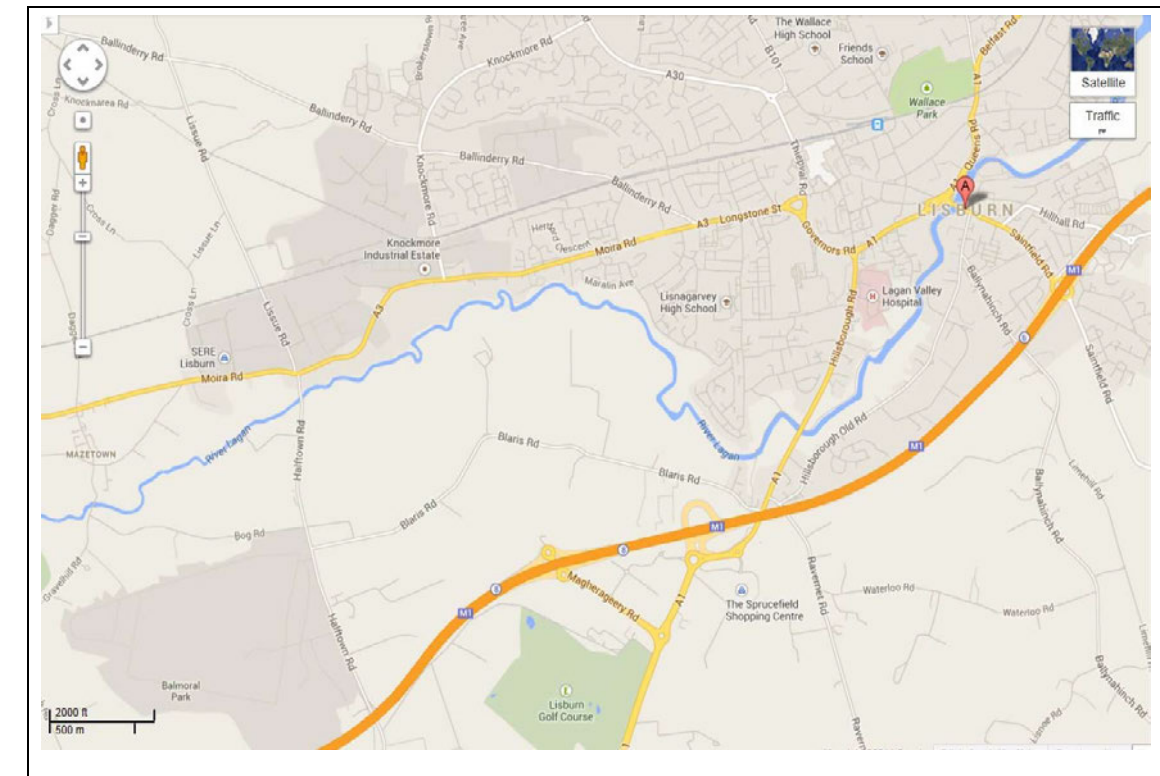
The terms of reference for the study includes:

- A review of relevant economic strategy documents relating to the West Lisburn area;
- The development of a socio-economic baseline for the West Lisburn area and identification of key issues;
- The identification of key growth sectors that are of relevance to the West Lisburn area and high level assessment of the potential job impacts associated with development within these sectors; and
- A high level assessment of the extent to which the development framework will contribute to the economic objectives for the local area (via a matrix/scorecard approach).

1.2 Study Area

The development site is located to the South West of Lisburn and covers approximately 3,000 acres. It is bound to the south by the M1 motorway, to the North and East by the river Lagan and by the proposed Knockmore link road to the west. The area has some residential areas, but is largely zoned for economic development use. The map below illustrates the study area:

Figure 1.1: Map of proposed development zone



Source: Google Map

The West Lisburn development zone covers the following wards:

- Blaris (with a population of 3,375);
- Knockmore (with a population of 4,298); and
- Maze (with a population of 3,813).

The table below illustrates the distance to the following settlements:

Table 1.1: Distance to Main Settlements

Settlement	Distance
Belfast	9 miles
Dublin	96 miles
Londonderry	78 miles
Newry	29 miles
Craigavon	15 miles

Source: Google Maps

The table below illustrates the distance to the following key gateways to the region, including:

Table 1.2: Distance to key regional gateways

Gateway	Distance
Port of Belfast	9 miles
Port of Larne	31 miles
Warrenpoint Harbour	35miles
Belfast International Airport	16 miles
George Best Airport	11 miles
Dublin Airport	90 miles

Source: Google Maps.

In summary, Lisburn is within half an hour's drive time to over 70% of the Northern Ireland population and within a 2 hour drive time of over half of the population for the island of Ireland. It is also within an hour's drive time of the three eastern seaboard ports and the two principal airports of Northern Ireland.

The area does not currently have a higher/further education located within it, however it is easily accessible to the following academic institutes:

Table 1.3: Distance to main academic institutes

Institution	Distance
Queen's University of Belfast	10 miles
University of Ulster	14 miles
Belfast Metropolitan College	10 miles
South Eastern Regional College	3 miles
Southern Regional College	25 miles
Northern Regional College	42 miles

Source: Google Maps

The table illustrates that the development zone is within half an hour's drive of six further and higher education institutions which between them have over 50,000 students and account for over 90% of government supported knowledge transfer through mechanisms such as innovation vouchers and knowledge transfer partnerships⁴

The area also has the following existing/planned developments:

- **Sprucefield Retail Park:** This extends of 231,426 ft² and includes two large pavilions for anchor tenants (Sainsbury's and B&Q) as well as four smaller units (occupied by Currys, Argos, Next Home and Toys 'R' Us). There is also on going plans for a second phase of development, amounting to 200,000 ft² with one major anchor tenant and potentially another 29 retail units;
- **Proposed Blaris Development:** This extends to 400 acres of land between Sprucefield and Knockmore. Key elements of the proposals include:

- 2 million square feet of business and commercial uses with potential to accommodate over 4,000 new jobs;
- Potential to provide up to 3,000 new houses;
- The creation of a centrally located 'core' to provide easily accessible community services;
- Provision for the siting of a school within the residential area (subject to future discussions with DENI and SELB);
- A new 120 bedroom 4 star hotel

- **Maze/Long Kesh:** As noted in Section 2 the Maze Long Kesh site is 347 acres and is twice as large as the existing Titanic area. The former prison, together with the conserved buildings, equals less than 30 acres of the total area. The Balmoral show currently occupies up to 65 acres. The use of the remaining 240 acres is still subject to on-going negotiation.
- **Knockmore Industrial Estate.** The area is already serviced through the following existing industrial parks including:

Table 1.4: Land availability

Industrial Estate	Landholding (Acres)	Available Land (Acres)
Knockmore Hill	75.00	8.20
Lissue Road	66.32	0
Ballinderry Road	6.28	0
Aghnatrisk Road	7.04	0
Dundonald	9.25	0
Newtownbreda	4.0	0

Source: Invest Northern Ireland (2014)

Feedback from Invest NI indicates that there is approximately 4 years' supply of development land for indigenous Lisburn companies. This does not take into account emerging opportunities at either Blaris or Maze/Long Kesh. It also does not take into account potential demand from other Council areas or inward investment.

1.3 Our approach

In order to develop a socio economic review of the study area we have carried out the following activity:

- Desk based review of relevant economic development strategies related to the West Lisburn area and key sectors prevalent within the area;
- Desk based review of socio economic data for Northern Ireland, Lisburn City Council area and also the three composite wards of the development zone; and
- Interviews with economic development practitioners from Invest NI and Lisburn City Council and the Strategic Investment Board.

⁴ Invest NI evaluations of Knowledge Transfer Partnerships and innovation vouchers.

1.4 Structure of the Report

The report will have the following structure:

- Strategic Context;
- Socio Economic Context; and
- Forecast Growth and Demand for Property.

2.0 STRATEGIC CONTEXT

2.1 Introduction

Any assessment of a proposed development zone needs to be mindful of the policy environment in which it will operate. This socio economic review will augment the proposed concept Masterplan, as a guide for the overall development providing a detailed discussion of the planning policy statements and regional and local strategies relevant to the proposed development. Therefore, rather than provide an exhaustive discussion on each of the main policy areas impacting on the whole proposed development, we summarise the key policy issues below in terms of socio-economic infrastructure and their likely impact.

The strategies/policy documents reviewed are listed in the table below:

Table 2.1: Regional and Local Strategies

Regional	Local Strategies
Northern Ireland Programme for Government (2011-15); Economic Development Strategy for Northern Ireland (2012) (including MATRIX Strategy); Draft Innovation Strategy (2014); Investment Strategy for Northern Ireland (2011-2021); Invest NI Corporate Plan (2011-15); and Department of Regional Development: Regional Development Strategy (2035).	Lisburn City Centre Masterplan (2010); Lisburn City and Castlereagh Borough Council: Corporate and Business Plan (2013-14); Lagan Corridor Strategic Framework; and Maze Long Kesh Development Plan.

2.2 Review of Regional Strategies:

2.2.1 Northern Ireland Programme for Government (PfG)

The Northern Ireland Executive's priorities for the current PfG are as follows:

- Growing a Sustainable Economy and Investing in the Future;
- Creating Opportunities, Tackling Disadvantage and Improving Health and Wellbeing;
- Protecting Our People, the Environment and Creating Safer Communities;
- Building a Strong and Shared Community; and
- Delivering High Quality and Efficient Public Services.

Of particular significance is growing a Sustainable Economy and Investing in the Future, which states:

The primary purposes of this Priority is to achieve long term economic growth by improving competitiveness and building a larger and more export driven private sector. This means:

- More jobs/people in work;
- A better educated and more highly skilled workforce;
- A healthier population and a competent and confident well educated and more highly skilled workforce;
- Enhanced economic infrastructure;
- Encouraging innovation and research and development; and
- Developing the green economy.

Implications for the development framework:

The Strategy stresses the importance of attracting foreign direct investment (FDI) and has set a target of £375million. To ensure this target is met, the Strategy highlights enhancing the economic infrastructure (access to broadband and transportation routes) to meet the emerging demands for target sectors (to date this has mainly related to business and financial services, which are primarily city centre based). However, FDI patterns are fast changing and so the Northern Ireland offering has to be adaptable, including provision of property in city centre locations and also green-field sites, with good accessibility to transportation links for large scale inward investment. The West Lisburn site provides green-field sites with good accessibility to key ports and settlements via the M1.

2.2.2 Economic Development Strategy for Northern Ireland

The overarching goal of this Strategy is to improve the economic competitiveness of the Northern Ireland economy. In order to achieve this, the strategy aims to focus on export led economic growth. This means prioritising the need to deepen and diversify the export base in order to increase employment and wealth across Northern Ireland. The key drivers of this will be innovation, research and development and skills of the workforce. The Strategy outlines that there are certain sectors and markets which have the greatest potential to succeed. The science/industry MATRIX panel has identified the following as being key sectors for growth:

- Telecommunications and ICT;
- Life and Health Sciences;
- Agri-food;
- Advanced Materials; and
- Advanced Engineering.

The Strategy goes on to highlight the importance of the following sectors to the development of the Northern Ireland economy:

- Creative Industries;
- Tourism;
- Social Economy; and
- Rural Economy.

Implications for the development framework:

The strategy does not have a specific spatial element, however it does clearly articulate that the emerging economic development agenda must be export led and focus on supporting the leading sectors highlighted above.

2.2.3 Draft Innovation Strategy

The proposed Innovation Strategy sets out the long term actions necessary to ensure that innovation plays the full part in realising the vision of the Economic Strategy, including:

‘Northern Ireland, by 2025, will be recognised as an innovation hub and will be one of the UK’s leading high growth, knowledge based regions which embraces creativity and innovation at all levels of society’

In tangible terms this sort of transformation by 2025 will mean:

- Many more of our companies engaging in innovation, collaboration and exporting;
- Doubling the number of knowledge economy businesses and increasing their employment by 15,000
- Expenditure of £1billion per annum on R&D; and
- Greater numbers of young people achieving graduate and post graduate qualifications in STEM.

The key barriers to innovation are discussed in the table below:

Table 2.2: Barriers to Innovation

Barrier	Description
Knowledge	Absorptive capacity, trust, intellectual property, lack of communication, lack of information
Access to Capital	Availability of finance and cost of finance
Incentives	Lack of competition, lack of inducements, lack of ambition
Markets	Identifying opportunities, understanding opportunities, regulation, standardisation, access to markets and language barriers
Skills	Leadership, technological R&D, creative thinking.
Cultural Changes	Risk aversion, entrepreneurship, understanding innovation, managing change.

Source: Draft Innovation Strategy: DETI 2014

Implications for the development framework:

The draft innovation strategy highlights the importance of embedding innovation across all sectors, not just the leading high tech sectors and, as will be noted in Section 3, the West Lisburn Development zone has a concentration of low tech light manufacturing firms which could benefit from enhanced investment in research, development and innovation.

Although there is not an explicit spatial element to the draft Innovation Strategy, several of the barriers, particularly those related to absorptive capacity, skills and cultural change can be in part mitigated through the use of cluster/supply chain interventions. The provision of accommodation for co-location of clusters and/or the wider supply chain can lead to knowledge exchange of best practice and the economies of agglomeration. Therefore sites should be provided which will permit co-location of clusters, supply chain partners and also knowledge providers (such as the Universities and or Regional Colleges).

2.2.4 Investment Strategy for Northern Ireland

The focus of this strategy is on protecting jobs, fostering economic recovery and protecting public services. The Strategy’s priorities reflect Executive priorities which are:

- Growing a sustainable economy and investing in the future;
- Creating opportunities, tackling disadvantage and improving health and wellbeing;
- Protecting our people, the environment and creating safer communities;
- Building a strong and shared community; and
- Delivering high quality and efficient public services.

Various investments have recently been made in the Lisburn area, such as the development of a new campus for the South East Regional College. Lisburn is however identified in the Strategy as one of five deprived areas in Northern Ireland which will undergo a public realm scheme in order to stimulate investment and economic activity. The public realm scheme aims to:

“maximise the potential of the City Centre to position Lisburn as a contemporary European City, bringing the best possible benefit to its people and their quality of life” (Lisburn City Council).

Implications for the development framework:

The proposed development framework provides an opportunity through investment in Blaris, Maze Long Kesh and Sprucefield to further diversify the Lisburn economy by providing key locations for investment in key sectors (including agri-food, tourism and retail).

2.2.5 Invest NI Corporate Plan

Invest NI’s Corporate Plan is based around the Executive’s focus on rebalancing and rebuilding the economy. Invest NI therefore plans to:

- stimulate innovation and creativity amongst their business base,
- drive business growth and
- internationalise the Northern Ireland economy.

Implications for the development framework:

Invest NI is charged with delivering key aspects of the economic development strategy, which is export led and with a focus on supporting leading sectors. Invest NI does not have a specific place based strategy, but focuses its interventions on companies. The economic development framework must therefore articulate and sign post to Invest NI the needs and opportunities of companies already located in or planning to locate in the West Lisburn area.

2.2.6 Department of Regional Development: Regional Development Strategy (RDS)

This (revised) strategy sets out the framework for the spatial development for Northern Ireland up to 2035. The Strategy reflects the Programme for Government approach of balanced sub-regional growth and recognises the importance of key settlements as centres for growth and investment.

The 8 aims of the revised RDS are to:

- Support strong, sustainable growth for the benefit of all parts of Northern Ireland;
- Strengthen Belfast as the regional economic driver and Londonderry as the principal city of the North West;
- Support our towns, villages and rural communities to maximise their potential;
- Promote development which improves the health and well-being of communities;
- Improve connectivity to enhance the movement of people, goods, energy and information between places;
- Protect and enhance the environment for its own sake;

- Take actions to reduce our carbon footprint and facilitate adaptation to climate change; and
- Strengthen links between north and south, east and west, with Europe and the rest of the world.

Implications for the development framework:

The urban area of Lisburn benefits from its location at the meeting point of the Belfast/ Dublin economic corridor and the East/West transport corridor...Lisburn has a vibrant city centre with a strong focus on leisure provision, sports and the arts. Potential exists to grow the retail offer and create high quality office offer through the creation of employment in business services. Potential also exists to generate a new driver for the night-time economy and to provide a range of flexible commercial accommodation and business parks at development locations such as Blaris and the Maze/Long Kesh. As such, the government considers Lisburn to be a key location for economic growth and plans to: Enhance Lisburn City as a major employment and commercial centre.

2.3 Review of Local Strategies

2.3.1 Lisburn City Centre Masterplan (2010)

The Masterplan states that:

“The vision for the masterplan is designed to ensure that Lisburn plays a more significant role within the region and develops the range of facilities and attractions that are expected of a regionally significant city...Lisburn City Centre will play a strong complementary role to Belfast City Centre and Sprucefield – with Lisburn being distinguished by its compact nature, environmental setting, heritage and quality of life.”

Specifically, the framework illustrates the opportunities for:

- Re-establishing Market Square as the heart of the City Centre, surrounded by a cluster of new mixed use developments and playing a clear role in relation to the cultural and evening economy of the City Centre;
- Developing a contemporary retail offer and a strengthened retail circuit comprising Market Square, Bow Street, Jordan’s Mill, Bow Street Mall, Lisburn Square and Smithfield Square;
- Developing a new mixed use Business District containing a range of high quality offices and a mix of uses along Linenhall Street;
- Creating new mixed use development areas fronting onto the River Lagan and offering a range of business accommodation fronting the river, and a range of new homes;
- Improving key public spaces including Market Square and creating a new public square in front of the railway station;
- Enhanced public realm on Bow Street;

- Opportunities for hotel developments in prominent locations including Market Square and a site adjacent to the River Lagan;
- Stronger pedestrian links to the River Lagan and to adjacent neighbourhoods;
- A range of new car parking options serving the City Centre; and
- Potential enhancements to the pedestrian environment to promote easier access to and within the City Centre.

Implications for the development framework:

The Master plan confirms the importance of creating mixed use development sites which both benefit and augment their immediate environment. In particular, the Master plan notes the strategic importance of the River Lagan in the promotion of new development zones, including the West Lisburn Development Zone.

2.3.3 Lisburn City and Castlereagh Borough Council: Corporate and Business Plan (2013-14)

Under the Review of Public Administration (RPA), Lisburn City and Castlereagh Borough Council will merge together later this year and will form a new Shadow Council. Lisburn will retain its city status; the name of the new council will be Lisburn City and Castlereagh District Council.

Implications for the development framework:

A key aim of the new Lisburn City and Castlereagh Borough Council Corporate and Business Plan is to develop the local economy, support local business and encourage new investment. In particular, the development of the Maze/Long Kesh site is viewed as a significant opportunity for development.

2.3.3 Lagan Corridor Strategic Framework

The purpose of the Lagan Corridor strategic framework is to provide a framework illustrating how planning and design policies and principles should be implemented in Lisburn's Lagan corridor. The purpose of the Strategic Framework is four fold:

- to capitalise on work carried out to date and to express a coherent vision of how Lisburn's Lagan Corridor can be developed, providing a degree of certainty about what will be expected from the public and private sectors and the wider community, set within the context of the Belfast Metropolitan Area Plan;
- to create greater awareness of the commercial and practical aspects of locations along the Lagan and the potential benefits to the local community and wider Lagan Valley;
- to inspire high quality design and imaginative architecture by initiating creative responses to the identified sites; and

- to provide the basis for producing more detailed guidance through site specific development briefs and master-plans.

Implications for the development framework:

The vision for the Lagan Corridor is 'a vibrant attractive and clean river environment incorporating facilities for the reopened Lagan Navigation. A special place which draws people from the local area and beyond to enjoy the life and vitality of the high quality city riverfront and the peace and tranquillity of the unspoilt natural environment with its historic mill villages nestling in the Regional Park.' The proposed West Lisburn Development Zone will aim to maximise the development potential of the Lagan Corridor.

2.3.4 Maze Long Kesh Development Plan.

The Maze Long Kesh site is 347 acres and is twice as large as the existing Titanic area. The proposed Peace building and Conflict Resolution Centre (PpCRC), together with the conserved buildings, equals less than 30 acres of the total area. The Balmoral show currently occupies up to 65 acres.

The Maze Long Kesh Development Corporation will be responsible for securing the regeneration of the 347 acre site. The Regional Development Strategy identifies the opportunity for a major physical, economic and social development package of regional significance. Momentum is already building with the completion of demolition and remediation, the securing of funding for the PbCRC which will be complete in 2015.

Implications for the development framework:

The proposed Maze/Long Kesh Development provides adequate greenfield space for a number of business development options, including:

- Location for possible inward investment; and
- Location for 'cluster development; for indigenous companies

2.4 Conclusions

The following provides a summary of the conclusions from the strategic review:

- Key constraints to the Northern Ireland economy are: low productivity associated with poor absorptive capacity (for R&D) and low levels of export activity. The focus of economic development support needs to be both on supporting indigenous companies/start-ups and attracting foreign direct investment;
- Key sectors for growth within the NI economy are: Life and Health Sciences, Agri-food, Advanced Materials, Advanced Engineering, Creative Industries, Tourism, Social Economy and Rural Economy. Of specific interest within the West Lisburn area is light engineering, retail and distribution (which are not seen as key priorities for NI as a whole);

-
- There is a recognition of the unique spatial offering of the West Lisburn area, as it is at the meeting point of the Belfast/Dublin economic corridor and the East/West transport corridor; and
 - Potential exists to grow the retail offering and create office/manufacturing accommodation in the available green-field space at Blaris and Maze/Long Kesh.

3.0 SOCIO ECONOMIC REVIEW

3.1 Introduction

Lisburn is a city on the edge of the provincial capital of Northern Ireland, Belfast. Although the City of Lisburn, the third largest settlement in Northern Ireland, is a significant economic entity in its own right, an analysis of this 'edge of city' offering is essential to understanding the true economic potential of the West Lisburn development zone and of the city as a whole.

Economists such as Richard Florida⁵ have stated that edge of cities have come to dominate recent urban growth in the UK (Croyden for London) and in the US (Hoboken in New Jersey and White Plains In New York and Burbank for Los Angeles). This is largely as a result of decentralisation of economic and commercial activity with office campuses and large scale shopping developments replacing office towers, street level shop fronts and city centre department stores all fuelled by lower land prices, green-field development opportunities and market demand. In addition, skilled workforces have largely moved to adjacent suburban locations.

Florida (2010) has identified three key variables which determine the success of key edge cities, namely:

- Business Environment: the underlying market characteristics of the businesses within an area;
- People Environment: the demographic profile of an area, the skillsets of the population and finally an assessment of the 'liveability of an area' (seen as being a key attractor to inward investment); and
- Physical Environment: principally focused on the accessibility of an area (i.e. transport infrastructure) (However this will be principally covered in the wider planning review of the area).

Consequently the review will involve the following key elements:

- Providing an overview of the business environment and the people environment of the three wards which comprise West Lisburn, against first Lisburn as a whole and then the rest of Northern Ireland; and
- Assessing trends in inward investment.

3.2 Overview of the People and Business Environments

3.2.1 The People Environment

The socio-economic profile will cover the following issues:

- Population;
- Employment and Skills; and
- Level of Social and Economic Deprivation.

3.2.2 Population

On census day, there were 18,680 people⁶ living in the West Lisburn area, the median age of the population is 42 (slightly older than the Northern Ireland median age of 37) and an average household size of 2.34.

The table below provides a breakdown by age of the composite areas:

Table 3.1: Percentage of population by age

	Under 16	16-64	Over 65
West Lisburn	19%	63%	18%
Lisburn	22%	63%	15%
Northern Ireland	21%	63%	16

Source NISRA and 2011 Census

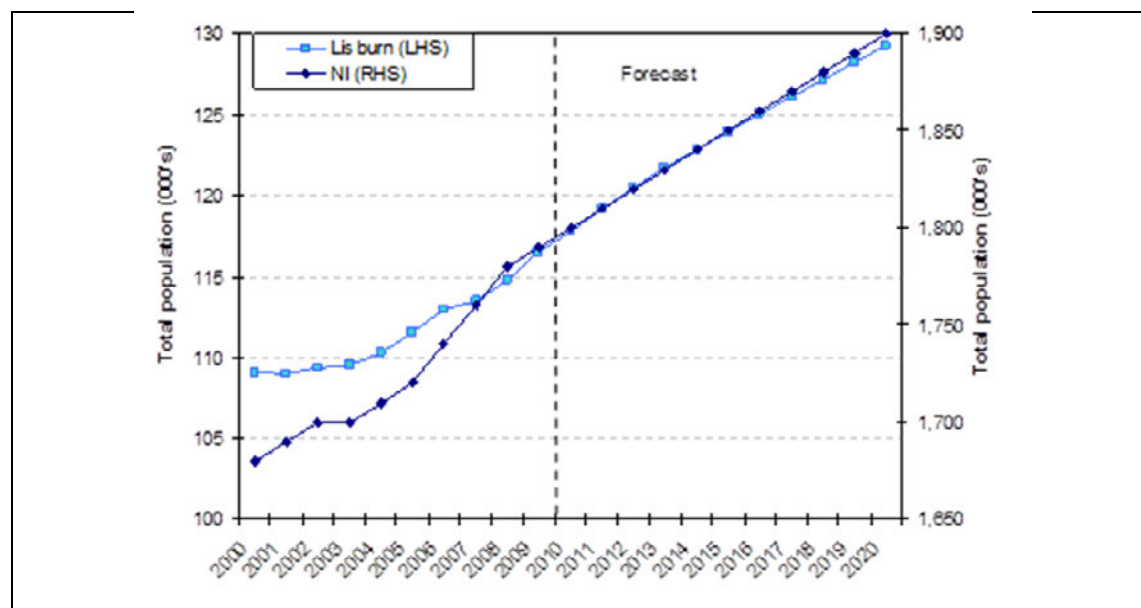
Given the suburban profile of the area it is not unexpected that the area should have a higher percentage of older people than the Northern Ireland average.

Lisburn Council area enjoyed a stronger rate of population growth than the regional average between 2000 and 2010 (8% compared to 7.1%). The figure below provides a forecast of anticipated population growth between 2010 and 2020 for Lisburn, Northern Ireland and the UK as a whole:

⁵ Florida, R., Gulden, T., and Mellander, C. The Rise of the Mega Region. The Martin Prosperity Institute 2010.

⁶ Including 3,375 in Blaris, 3,816 in Maze and 4,298 in Knockmore wards.

Figure 3.1: Population Growth



Source: NISRA, Oxford Economics

The total population for the City of Lisburn is expected to rise from 117,840 in 2010 to 129,290 (9.7%) by the end of the decade. This increase represents a slightly higher rate of increase than the Northern Ireland average (9.7% compared to 5.7%).

3.2.3 Employment

The table below provides an overview of employment levels within the development zone, city and Northern Ireland level:

Table: 3.2: Percentage economically active

Area	Economically Active
Development zone	71.04%
Lisburn City	70%
Northern Ireland	73.1%

Source: NSRA 2012

Lisburn and the development zone have a lower level of economically active people than the Northern Ireland average (which already is the lowest of the 12 UK regions). This lower level of economic activity is related to the older age profile of the area, rather than unemployment (as is noted in table 3.3).

The table below compares the number, rate and change in unemployment for Lisburn when compared to both Belfast and Northern Ireland as a whole:

Table: 3.3: Analysis of Unemployment Statistics (April 2014)

Area	Number of Claimants	Percentage of Working Age	Change over year	Jobs Density ⁷
Belfast	12,541	6.7%	-10.5%	1.34
Lisburn	3,040	3.9%	-16.1%	0.62
Northern Ireland	56,047	4.8%	-12.6%	0.73

Source: Department of Finance and Personnel: Monthly Labour Market Report (May 2014)

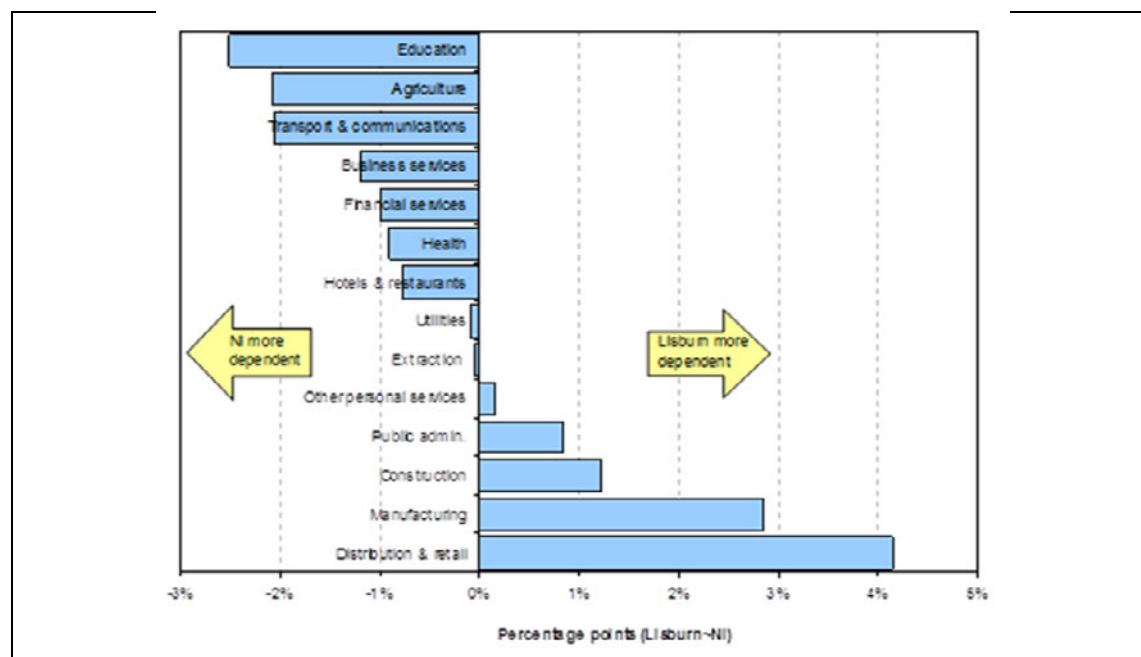
Lisburn enjoyed above average employment growth up to the onset of the recession in 2008 (8.1% compared to 5.5% in the period 2004 to 2008). This was primarily fuelled by job creation in the business services, retail and construction sectors (1,200, 1,000 and 800 jobs). Table 3.3 illustrates that since the recession unemployment has dropped more significantly than both the Northern Ireland average and for that of Belfast. Lisburn now has an unemployment rate lower than the regional average. The following Council areas have lower unemployment rates than Lisburn: Antrim, Ballymena, Banbridge, Magherafelt, Newtownabbey and North Down.

However, Lisburn's jobs density figure, is significantly lower than the Northern Ireland average, illustrating that a significant number of Lisburn residents commuting to elsewhere.

The figure below illustrates the sectoral profile of employment across the Lisburn area, which highlights that when compared to NI as a whole, Lisburn presently has an over-reliance in construction, manufacturing, distribution and retail.

⁷ Jobs density, total number of jobs in an area divided by the resident population of working age in the area.

Figure 3.2: Sectoral Employment



Source DETI:

Table 3.4⁸ measures the difference in employment by sector in Lisburn and Northern Ireland between the period 2007 to 2011:

Table 3.4: Employment by sector

	Lisburn		NI	
	000's	%	000's	%
Agriculture	0.2	14.2	4.2	12.0
Extraction	0.0	-17.3	-0.5	-24.4
Manufacturing	-0.9	-13.3	-9.2	-10.0
Utilities	0.0	-29.0	-0.6	-22.1
Construction	-0.1	-1.1	-11.6	-15.2
Distribution & retail	-0.7	-6.3	-4.0	-2.7
Hotels & restaurants	0.1	4.7	4.0	8.7
Transport & communications	0.1	9.4	1.9	5.2
Financial services	-0.1	-9.9	-1.4	-6.6
Business services	-0.4	-7.7	-5.1	-5.4
Public admin.	-0.1	-2.3	0.1	0.2
Education	0.0	1.3	2.4	3.3
Health	0.3	4.9	2.0	1.6
Other personal services	0.1	4.2	1.9	4.4
Total	-1.5	-2.9	-19.0	-2.2

Source DETI and Oxford Economics

Although Table 3.4 illustrates that in a number of key sectors such as utilities, manufacturing and construction, Lisburn like Northern Ireland as a whole suffered as a result of the recession, it will be noted in the next section, that these sectors have a significant potential for growth.

The table below compares the mean average wage for Lisburn compared to the Northern Ireland average and illustrates the impact of the sectoral composition of the local economy:

Table 3.5: Mean wage level and Frequency by Population Level

Area	Wage Level per week	Population
Lisburn (All)	£431	37,000
Northern Ireland (All)	£429	674,000
Lisburn (Full time)	£539	27,000
Northern Ireland (Full time)	£538	462,000
Lisburn (Part time)	£152	10,000
Northern Ireland (Part time)	£189	212,000

Source: DFP ASHE (2013)

In terms of mean salary⁹, Lisburn has a marginally higher salary level than Northern Ireland as a whole, this is also the case for full time jobs. However, the Lisburn Council area has a significantly lower salary level for part time work than Northern Ireland. The slightly higher full time wage level reflects the higher incidence of manufacturing jobs in the Lisburn Council area, it does not include the significant number of Lisburn residents who are employed outwith of the Council area in professional jobs (and whose inclusion would further increase the average wage level).

In terms of labour productivity, it is not possible to get a specific figure for the Lisburn Council area. However, we have used a regional figure for the East of Northern Ireland (which includes Lisburn but excludes Belfast) which illustrates the following:

Table 3.6: Productivity measured by GVA¹⁰ per filled Job

Area	GVA per filled job as percentage of UK average
UK	100%
Belfast	91%
East of Northern Ireland	87%
North of Northern Ireland	79%
South and West of Northern Ireland	75%

Source: Office of National Statistics (2012)

The table illustrates that not only does Northern Ireland continue to lag in terms of productivity the rest of the UK, but that the East of Northern Ireland (including Lisburn) has a productivity level 13% lower than the UK average. This is only an average figure and does not reflect the

⁸The above table simply reflects the percentage change in those employed in the Lisburn area, it does not measure the sectoral change for those who work in other district council areas.

⁹ Salary levels relate to employment within the District Council

¹⁰ Gross Value Add

relative strength of specific companies in the Lisburn area, a number (15) of which are internationally competitive.

3.2.3.1 Skills

Data from the Labour Force Survey shows that Lisburn has the 5th lowest proportion of the working age population with no qualification, outperforming the Northern Ireland average. Lisburn has the 5th highest proportion of its working age population in Northern Ireland qualified at NVQ4 at 30.2%.

A review of the skills profile of Lisburn illustrates that the city compares favourably in terms of both Northern Ireland (where it is in fifth place of all local authorities), which in turn compares well against the UK average. In addition, the high economic activity rate and a high percentage of employees in the manufacturing and distribution sectors illustrates a workforce which has a high level of technical competency.

3.2.3.2 Level of Social and Environmental Deprivation

The following section has been derived by aggregating deprivation statistics for the three wards in the West Lisburn area. The table below compares the West Lisburn area to the Northern Ireland average:

Table 3.7: Comparison of Social and Environmental Deprivation (2011)

Indicator	West Lisburn	Northern Ireland
Median age at death	79	80
Households in relative poverty	15.8%	17.0%
Car registered to a disabled person (%)	7.8%	8.4%
Owner occupied households	63%	67%

Source: Northern Ireland Neighbourhood Information Service (2011)

The table illustrates that the area is marginally below the Northern Ireland average against each of the four headings. However, this reflects the higher incidence of elderly (rather than unemployed) within the local population compared to Northern Ireland as a whole. As noted above, for those in full time employment, income levels in Lisburn are slightly higher than the Northern Ireland average.

3.2.4 The Business Environment

As was noted in the strategic review, there are a number of key sectors (including Life and Health Sciences, Agri-food, Advanced Materials and Advanced Engineering) in which Northern Ireland has a distinct advantage and in which there is a significant potential for growth. Within this section we will review the local composition of businesses to assess their complementarity with these growth sectors and to also assess the opportunities for local business start-up and survival rates.

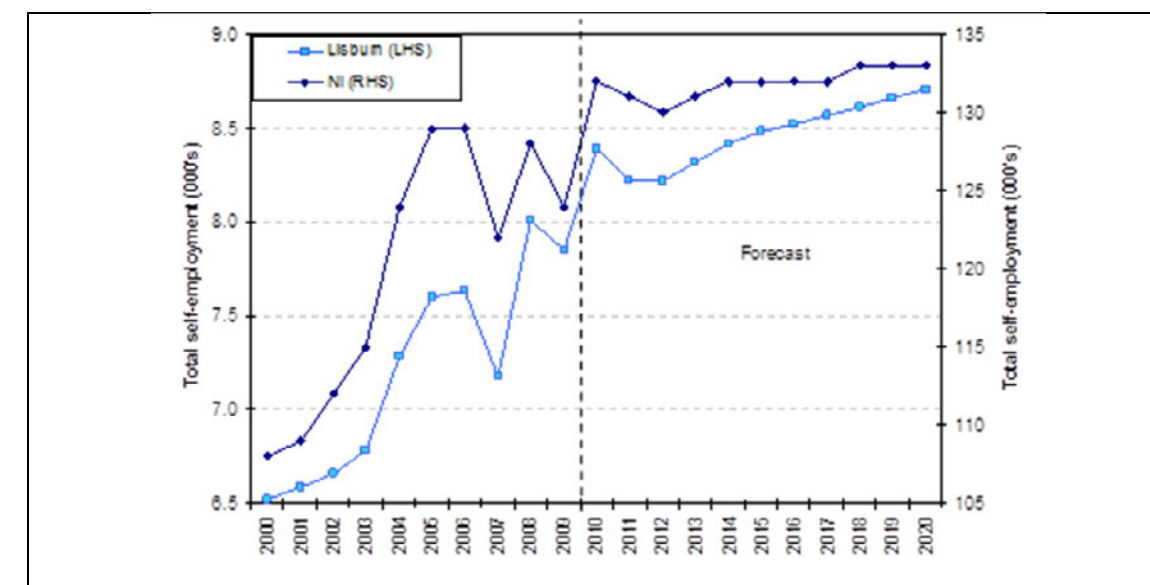
3.2.4.1 Number of Registered Companies

In 2012 according to the Interdepartmental Business Register, Lisburn had 3,725 VAT registered companies, this amounted to 5.5% of the total registrations for Northern Ireland. Lisburn Council was in fourth position, behind Belfast, which had 12.3% of VAT registrations and Newry and Mourne and Fermanagh which had 6.8% and 6.2% respectively. 2,700 of the 3,725 VAT businesses in the Lisburn area were classified as being micro (i.e. less than 5 employees). There were 15 large companies (those employing over 250 employees), principally in distribution and light manufacturing. Lisburn City Council is second only to Belfast (70 large companies) for the concentration of large companies.

3.2.4.2 Business Start Up Rates

The figure below illustrates the level of business start-ups until 2019:

Figure 3.3: Business Start/Self Employment



Source: DETI

The table above illustrates an increasing convergence with the NI business start-up rate. Looking ahead, total self-employment is expected to rise over the next decade, particularly in the construction and service sectors. Consultation with Invest NI confirmed that most of these

businesses would operate from home and of those which would need commercial premises, could be accommodated within the existing provision.

3.2.4.3 Sectoral Composition

The table below compares the sectoral employment concentrations between Lisburn and Northern Ireland:

Figure 3.4 Sectoral Employment Concentrations

	LQ 2009	% total employment in Lisburn	% total employment in NI
Construction	1.58	8.25	5.22
Retail & distribution	1.27	23.00	18.07
Manufacturing	1.23	13.02	10.55
Public admin	1.06	8.74	8.28
Other personal services	1.02	4.82	4.74
Health	0.97	16.05	16.51
Business services	0.85	9.01	10.65
Hotels & restaurants	0.84	5.09	6.04
Extraction	0.82	0.22	0.27
Education	0.68	6.93	10.20
Agriculture	0.62	1.05	1.70
Utilities	0.59	0.16	0.27
Transport & comms	0.54	2.26	4.21
Financial intermediation	0.51	1.39	2.71

Source: Oxford Economics

As was noted earlier, the table confirms the employment concentration within Lisburn and zone in terms of construction, retail and distribution, manufacturing and public administration. There is however a significant under representation in the target sectors identified in the Northern Ireland Economic Strategy of Agri foods, advanced materials, advanced engineering and life and health sciences.

In the following table we investigate whether the Lisburn area has the underlying economic characteristics in order to attract indigenous investment from the target sectors:

	Description of Sector	Development Constraints	Possible Mitigation/Lisburn Offering
Telecommunications and ICT	The telecommunications sector is dominated by a small number of large telecommunication companies, who are well established, however there are an increasing number of business ICT start-ups and small scale inward investors.	These are very specialist companies and are constrained by three variables: Access to specialist staff; Access to good broadband; and Access to small high quality office space, which is flexible allowing fast growth/contraction.	Although Lisburn in common with the rest of Northern Ireland has access to fast broadband through Project Atlas, companies within this sector prefer a city centre location, in order to attract specialist staff.
Life and Health Sciences	The life and health sciences sector is dominated by a small number of existing large companies, which have established premises.	These companies tend to prefer a greenfield site in order to permit growth and to comply with regulations in relation to the management of hazardous materials.	Although the proposed development zone has large scale greenfield sites, because of the composition of indigenous companies there is limited potential for the relocation of businesses to the Lisburn area.
Advanced Materials and Engineering	This is focused on a small number of sectors such as aeronautics, composites, bio technology computational sciences all of which are dominated by a small number of established companies	These companies tend to prefer a greenfield site in order to permit growth and to comply with regulations in relation to the management of hazardous materials. In addition, because these companies are producers of intermediate goods, they need access to good transport links.	Although the proposed development zone has large scale greenfield sites, because of the composition of indigenous companies there is limited potential for the relocation of businesses to the Lisburn area.
Agri food	The Agri-Food sector plays a significant role Northern Irish economy with the sector contributing £1bn per annum of value added ¹¹ and accounts for an estimated 20% of all private sector jobs ¹² . Agri-foods have demonstrated a strong track record of export growth with 70% of all sales from the food and drinks processing industry going outside of NI. ¹³ the majority of employment in the Food and Drinks Processing sector is concentrated in 6 council areas: 10%-15% in Craigavon, Dungannon and Ballymena. 5-10% in Cookstown, Coleraine and Moyle. Although the sector has a large number of international companies, low start-up costs and opportunities for product differentiation means that there is a high level of business start-up activity. Going forward, the agri-food sector is projected to grow by 3.8% ¹⁴ in 2014 which will place it firmly amongst the top five fastest growing sectors of the Northern Irish economy	The sector has the following development constraints: <ul style="list-style-type: none"> Given the low value to weight ratio, delivery costs are viewed as being the most important factor, i.e. access to established transport routes; and These companies tend to prefer a green-field site in order to permit growth and to comply with regulations in relation to the management of hazardous materials. 	The Lisburn site provides access to the main North/South and East/ West axes. In addition, the proposed development area also offers the following key advantages: <ul style="list-style-type: none"> Large scale greenfield/brownfield development sites; and Access to existing labour force/supply chain in the key distribution and light manufacturing (process and packaging sectors); and Proximity to existing food and drinks sector in Craigavon and Dungannon as well as the Royal Agriculture Show at the Maze.
Creative Industries	This is dominated by a large number of small established and business start-ups. These are primarily in the digital media sector.	These are very specialist companies and are constrained by three variables: <ul style="list-style-type: none"> Access to specialist staff; Access to good broadband; and Access to small high quality office space, which is flexible allowing fast growth/contraction. 	Although Lisburn in common with the rest of Northern Ireland has access to fast broadband through Project Atlas, companies within this sector prefer a city centre location, in order to attract specialist staff.

¹¹ <http://www.agrifoodstrategyboard.org.uk/background>

¹² Value of food and drink industry in NI (NIFDA 2010)

¹³ <http://www.agrifoodstrategyboard.org.uk/background>

¹⁴ Danske Bank (<http://www.danskebank.co.uk/en-gb/About-the-bank/Media-and-Press/Press-releases/2014/Pages/agri-economic-outlook-2014.aspx>)

3.2.4.4 Summary

The development area, in common with the rest of the city of Lisburn compares favourably against Northern Ireland as a whole, having:

- Higher than average salary levels (for full time employees);
- Lower than average unemployment;
- Lower than average incidence of income deprivation;
- A faster than average decline in unemployment;
- The fourth highest percentage of VAT registered companies in Northern Ireland; and]
- The second highest number of large companies (those employing over 250).

The development area has a robust light engineering and retail offering, however there is presently no clear cluster development (in common with most of Northern Ireland).

Both sectors are anticipated to have steady growth coming out of the recession. The area is under represented in transport and communications, business services and financial services (all three are expected to have above average growth rates). This under representation is partially down to the close proximity to Belfast and its relatively affordable office accommodation market. Any squeezing of the property market in Belfast could potentially cause spillover into Lisburn. The area is also under-represented in terms of key matrix sectors (Life and Health Sciences, Agri-food, Advanced Materials, Advanced Engineering). As noted above, it is not expected that indigenous companies will choose to relocate to the zone from the life and health science, advanced materials/engineering, ICT and creative industries sectors. However, there are opportunities for the development of an agri-food proposition building on the following advantages:

- Good road access;
- Extensive green-field site;
- Synergy with existing light manufacturing and distribution sectors; and
- Proximity to existing agri-food businesses and the recent relocation of the Royal Agricultural Show.

3.3 Inward Investment Trends

Northern Ireland has a strong track record in attracting foreign direct investment (FDI). In the five years from 2006/07 to 2010/11 Invest NI assisted over 120 companies to invest in green-field FDI projects. Software and ICT, business and professional services and financial services accounted for 71% of these new jobs¹⁵. In software development, Northern Ireland was the most successful

region in Europe in attracting green-field FDI¹⁶. The following are viewed as priority sectors for foreign direct investment into Northern Ireland

Table 3.8: FDI Priority Sectors

Sector	Competitive Advantage
Financial Services	Northern Ireland's main advantage is its very low labour costs compared to West European financial centres, with labour costs for job junctions in financial services around 50% lower than in Dublin, London and Paris. At the same time there is high skills availability with 2,500 finance related grates and a high number of graduate finance courses.
Software and ICT	NI has a strong advantage in the supply of graduates in computer science. When combined with substantial costs savings, both labour costs and property costs and the availability of financial incentives and support.
Business and Professional Services	This is the major sector for job creation in Northern Ireland accounting for over one third of inward investment jobs created in the last five years. The overall competitive advantage is similar to that for software and ICT, lower competition for graduates compared to other locations and the most competitive operating costs compared to Western Europe locations.
Aerospace	Inward investment in Northern Ireland in the aerospace sector is highly concentrated in the expansion activities of existing investors: Bombardier, Goodrich, Beaufort and Thales.

Source: FDI Intelligence and Invest NI

Globally the number of FDI projects is forecast to increase by 40% from 12,025 projects in 16,806 in 2015. The number of FDI projects attracted to the UK is forecast to increase by 7% over the next five years to over 800 projects in 2015. The average size of projects attracted to the UK is expected to decline and reflects companies locating larger strategic function in emerging markets rather than concentrating activities in Western Europe. For Northern Ireland, this means an increased level of FDI activity.

¹⁵ Invest NI FDI database

¹⁶ FDI Markets database, fdi Intelligence, Financial Times Ltd.

Research conducted by Cambridge Competitive Advantage (on behalf of Lisburn City Council) has highlighted the following sectors as having a significant inward investment potential for Lisburn City Council area:

Table 3.9: FDI Sectors for Lisburn City Council Area

Sector	Competitive Advantage
Advanced Manufacturing	Lisburn has a strong cluster of advanced engineering companies, when combined with the supply of industrial parks and the comparatively low freight transport costs (both within the region and internationally, make the city potentially attractive to inward investment.
Food & Drink	Lisburn has a strong cluster of light manufacturing and distribution/bottling factories which could provide a supply chain for any inward investment into the food and drink sector. In addition, the market opportunity for new investors is highly attractive as the UK trade deficit in food and drink is over £18.4bn (2010 figures) and therefore presents a prime opportunity for import substitution.
Renewable Engineering & Energy	Lisburn is located close to the UK's first bespoke offshore wind installation and assembly terminal was created at nearby Belfast Harbour for DONG Energy and the world's first full scale commercial, grid connected, tidal turbine. Businesses setting up in Lisburn can join a number of collaborative networks which have been established in the region to further build on supply chain success and capitalise on opportunities.
High Technology/ICT	Lisburn is an ideal near shore location to develop a European customer base and to provide 'follow the sun' customer service as part of a global delivery model. Lisburn businesses can access 13 university ICT related research centres in Northern Ireland, covering areas such as telecommunications and wireless, security technologies, engineering technologies and semi conductors and digital media.

From a review of inward investment trends into Northern Ireland, this will continue to be service led investment which is smaller in scale and favours city centre locations. However, the key sectors potentially attracted into Lisburn, are predominantly industrial/light manufacturing and therefore favour large scale development plots over city centre offices¹⁷.

3.4 Conclusions

The socio economic review has confirmed that the West Lisburn area has the following benefits:

- Excellent transportation links to the regional road network and the principal ports and airports for Northern Ireland;
- A diversified business sector, dominated by indigenously owned SMEs in construction, distribution, retail and light manufacturing; and

- In terms of skills, the area has the 5th highest proportion of its working population qualified at NVQ 4 level.

The emerging agri-food sector offers a significant opportunity for company growth and the possible development of a new cluster in the Lisburn area. The development area offers the agri-food sector access to road and port infrastructure thereby minimising the cost per food mile.

In addition, research by Cambridge Competitive Advantage has stated that there are opportunities for sizeable inward investment in the following sectors (and the consequent demand for development sites):

- Advanced manufacturing
- Food and drink;
- Renewable Engineering and Energy; and
- High Technology/ICT.

¹⁷ This is due to planning restrictions related to the associated technical activities.

4.0 FORECAST GROWTH AND DEMAND FOR PROPERTY

4.1 Introduction

This section utilises trend data for the key sectors identified in the earlier socio economic review and the separate analysis of inward investment trends (developed by Cambridge Competitive Advantage) to calculate the potential number of jobs created and/or sustained. These jobs are then used, (within the context of the development framework being prepared by Strategic Planning Ltd) to assess the potential level of demand for land/property within the West Lisburn area.

4.2 Approach

RSM McClure Watters has drawn reliance on the following published documents to establish sectoral growth rates and employment density (to calculate land use):

- Northern Ireland Centre for Economic Policy: Outlook Document (Spring 2014); and
- Office of Project and Programme Advice and Training (OFFPAT); Employment Densities Guide (2010).

The emerging development framework identifies three separate zones in which it is anticipated there will be distinct economic activity, including:

- Blaris Zone;
- Knockmore Zone ; and
- Maze/Long Kesh Zone.

For each zone the number of jobs sustained and/or created have been identified and translated into anticipated demand for property/space. The anticipated demand for property has been forecast for three specific time periods:

- A four year forecast;
- A ten year forecast; and
- A twenty year forecast.

We have utilised published sectoral growth data for the four year forecasts, discussed in Section 4.3. Section 4.4 utilises these four year growth forecasts and subject them to three future growth scenarios.

4.3 Four Year Growth Forecast

The following provides the key findings for each zone:

4.3.1 Blaris Zone

The principal economic activity within this zone is anticipated to be within the transport and distribution sector. Anticipated demand for property within this zone will be informed by three variables:

- Displacement of existing businesses from Culcavy (approximately 3 miles away);
- General growth within the transport and distribution sector; and
- The specific impact of the co-location of a growth cluster for the agri foods sector.

The table below identifies the number of transport and distribution businesses in the Culcavy area and their existing property needs:

Table 4.1: Calculation of Existing Property Needs

Number of Companies ¹⁸	Average Number of Employees ¹⁹	Total Number of Existing Employees	Existing Property Needs ²⁰
8	50	400	46,000 sq metres ²¹ or 45 acres

In the following table, a forecast growth rate for the sector is used to confirm future employment growth (including the impact of the co-location of a new agri-food business park) and how this will be translated into future property need:

¹⁸ Sourced from the Lisburn Council Company database for companies transport and distribution companies located in the Culcavy area.

¹⁹ Inputted from company profile information provided within the Lisburn Council Company database.

²⁰ This has been developed using the relevant sectoral employment density of 115sq m per employee as identified in OFFPAT's Employment Densities Guide (2010).

²¹ One distribution centre of 50,000 sq metres equates to 30 acres (Cost Model for Distribution Centres, we have therefore estimated that given the number of smaller companies, choosing to relocate this could potentially mean an area of 45 acres.

Table 4.2: Calculation of Future Property Needs

Total Number of Existing Employees	Average Growth Rate in employees over 4 year period ²²	Future Number of Employees	Property Needs over the next Four Years ²³
400	2.1%	434 (34 additional jobs)	4,000 sqm or 4 acres

In summary, assuming 100% relocation of existing companies from Culcavy to Blaris, will thus secure 400 jobs and will necessitate 45 acres of business space in the Blaris Zone.

Within four years it is expected that there will be 34 additional jobs and with an increased demand for 4 acres of development land in the new Blaris Zone.

It is assumed that the majority (if not all) of the jobs will be entry level²⁴ and so can be recruited locally. Table 3.3 provides a jobs density figure of 62% for the Lisburn District Council, we would therefore assume that 62% of these entry level jobs are recruited from the Lisburn population.

4.3.2 Knockmore Zone

The proposed economic activity within the Knockmore zone will relate to two variables:

- Existing companies; and
- Inward Investment.

The socio economic review of the Knockmore zone has identified a range of SMEs across (but not limited to) the following sectors:

- Light engineering;
- Digital media/ICT;
- Chemicals;
- Advanced engineering; and
- Retail and Distribution.

54 existing businesses across these 5 sectors have been identified within the Knockmore Zone. The table below provides an estimate of the number of employees per company, and an approved sectoral growth rate is used to forecast future employment growth for each of the 5 sectors. Finally, employment density analysis is used to translate employment growth into emerging property need:

²² Sourced from NICEP Sectoral Growth Figures.

²³ This has been developed using the relevant sectoral employment density as identified in OFFPAT's Employment Densities Guide (2010).

²⁴ Entry level jobs are those below NVQ4.

Table 4.3: Sectoral Growth and Future Property Needs

Sector	Number of Companies in sector	Average number of employees ²⁵	Average Growth Rate in employees over 4 year period ²⁶	Future Number of Employees	Additional Staff	Property Needs over the next Four Years ²⁷
Light Engineering	22 ²⁸	55	3% per annum	1,361	151	9,060 sq m
Digital Media/ICT	6	50	2% per annum	325	25	1,175sq m
Chemicals	2	50	3.1% per annum	113	13	780 sq m
Advanced Engineering	2 ²⁹	225	3.1% per annum	508	58	2,726 sq m
Retail and Distribution	22 ³⁰	50	2.1% per annum	1,195	95	10,735 sq m
Total					342	24,476 sq m or 12 acres ³¹

In summary, the total number of new jobs from existing companies is anticipated to be 342 within four years. This translates into a demand for 12 acres of additional business space in the Knockmore Zone.

It is assumed that only 50% of these total jobs created would be entry level and of these 62% would be recruited locally. The remaining 50% would be classified as being NVQ4 and above, and as noted in Section 3.2.3.1, only 30.2% of Lisburn residents would have the requisite skills. Therefore the total percentage of staff recruited from Lisburn would be: 46.1%³².

4.3.2 Inward Investment

RSM McClure Watters have benchmarked Lisburn against comparable provision for inward investment in other similar sized (including edge city) cities/towns across the UK, taking into consideration the specific property needs of the identified inward investment sectors. These cities include:

²⁵ This has been inputted following a review of the Lisburn Council Company Database and the Streetcheck website.

²⁶ Sourced from the NICEP Spring 2014 Outlook Report

²⁷ Developed using the relevant sectoral employment density as identified in OFFPAT's Employment Densities Guide (2010)

²⁸ Including McGrath Group and RPM

²⁹ Including Tata Steel

³⁰ Including Coca Cola Bottling Plant

³¹ Assuming 30 persons per industrial acre ;Areas required for industrial activity IDOX Plc

³² 62% of the 50% with qualifications lower than NVQ4 plus 30.1% of the remaining 50% with qualifications above NVQ4.

- Lincoln;
- Bath; and
- Paisley.

The table below confirms the amount of business space/development land, relevant City Councils/Development Agencies are reserving for inward investment:

Table 4.4: Provision of development land for Inward Investment

City	Amount of Development Land	Annual Uptake ³³
Lincoln ³⁴	80 hectares	8 hectares
Bath	140 hectares	15 hectares
Irvine	132 hectares	5 hectares

Source: Source Local Enterprise Partnership Business Plans for Lincoln and Bristol and Bath and Scottish Enterprise for Irvine.

The relevant Councils, have reserved these sites for inward investment related to Class 4,5 and 6, which augments the direct provision of office space in city centres. The Councils offer land in specific development parcels (Bath and Irvine, because they are contained in the appropriate enterprise zone/area there are a number of additional incentives included in the property package³⁵) and which the private sector subsequently development into bespoke buildings.

Arising from our Stakeholder Consultation, we believe that Lisburn does not presently have a land bank for inward investment. Therefore in the interest of prudence we have set a provisional figure of 10 hectares (24 acres) of reserve land for inward investment, which is comparable to the annual take up of land in the Lincoln area. An area of 24 acres has the potential to attract up to 720 jobs³⁶ (not including construction jobs).

It is assumed that only 50% of these total jobs created would be entry level and of these 62% would be recruited locally. The remaining 50% would be classified as being NVQ4 and above, and as noted in Section 3.2.3.1, only 30.2% of Lisburn residents would have the requisite skills. Therefore the total percentage of staff recruited from Lisburn would be: 46.1%³⁷.

4.3.3 Maze/Long Kesh Zone

The principal economic activity anticipated for this zone is to be the development of an agri-food cluster. CAFRE is presently undertaking a review of incubation/wider property support for the

agri-food sector in Northern Ireland with the possible implication of developing a new Agri-food park in an as of yet unspecified location. The Maze/Long Kesh site provides an opportunity to develop post incubation property supports for the sector (potentially through an Enterprise Zone).

Following stakeholder consultation, we believe that the proposed Perth Food and Drink Park provides a useful comparator for any potential development in Northern Ireland for the following reasons:

- Like Northern Ireland, the food and drink sector is the largest employer and exporter in the region;
- Like Northern Ireland, Perthshire is a region with a comparatively low GVA per head and issues of absorptive capacity (across all sectors);
- Although Perthshire has only 140 agri food companies to Northern Ireland's 400, the county is only one third the size of Northern Ireland; and
- Companies in Perthshire, like Northern Ireland, do not have access to any other specialist property provision for the agri food sector.

Perth City Council, in recognition of the importance of the Agri foods sector to its regional economy has developed a Food and Drink Business Park. It is our belief that this offers a good benchmark as to the scale and type of provision which Lisburn City Council should consider providing at the Maze/Long Kesh Site. The Perth Food and Drink Park consists of the following:

- Total area of business park: 6.5 hectares (16 acres) of serviced industrial land suitable for Class 4,5 and 6 use;
- Within the park, there is to be 1,400 sqm of advanced industrial floor space finished and fitted for food processing and preparation uses and which will be aimed at those companies coming out of the incubator stage (from other locations across Scotland); and
- In addition, there will be up to 10 serviced development plots ranging from 1 acre (0.4 Ha) to 3 acres (1.2 Ha) for developments in support of the food and drink sector.

Total employment at the Food and Drink park is expected to be 1,900 when complete (excluding construction jobs).

It is assumed that only 50% of these total jobs created would be entry level and of these 62% would be recruited locally. The remaining 50% would be classified as being NVQ4 and above, and as noted in Section 3.2.3.1, only 30.2% of Lisburn residents would have the requisite skills. Therefore the total percentage of staff recruited from Lisburn would be: 46.1%³⁸.

4.3.4 Summary

The previous section has identified the number of jobs created/sustained in each of the three zones within the West Lisburn Development Framework and translated these into demand for

³³ This is an estimate of the amount of development land utilised annually. Irvine only opened in 2012. The guidance is for roughly 10 year supply of development land for inward investment.

³⁴ This is through the development of a marine energy park of which 1 quarter of the total site of 325 hectares is focused on large scale inward investment.

³⁵ All businesses are eligible for accelerated capital allowances for plant and machinery, business rates relief of up to £55,000 per annum for 5 years, simplified planning policies and access to super-fast broad band.

³⁶ Assuming 30 industrial jobs per acre.

³⁷ 62% of the 50% with qualifications lower than NVQ4 plus 30.1% of the remaining 50% with qualifications above NVQ4.

³⁸ 62% of the 50% with qualifications lower than NVQ4 plus 30.1% of the remaining 50% with qualifications above NVQ4.

development land. The table below illustrates the total jobs created/sustained and the associated amount of land needed in each zone:

Table 4.5: Total Jobs Created and Sustained and Associated Property Needs

Zone	Additional Jobs within Four Years	Number of Jobs Recruited Locally	Projected Property Need within Four Years
Blaris	434 (created or sustained)	347	49 acres
Knockmore (Indigenous growth)	342 (created or sustained)	158	12 acres
Knockmore (Inward Investment)	720 (created)	439	24 acres
Maze/Long Kesh	1,900 (created) ³⁹	876	16 acres
Total	3,396	1,820	101 acres

In summary, within four years, it is anticipated that across the Blaris, Knockmore and Maze Long Kesh Zones, the identified economic activity will create/sustain upwards of 3,396 jobs (of which 1,820 will be sourced from the Lisburn City Council area) and potentially need 101 acres of development land.

4.4 Long Term Growth Scenarios

As Government, academic and commercial forecasting bodies are reticent to develop forecasts which extend over five years, RSM McClure Watters will utilise the existing four year forecast prepared by NICEP and test them against the following three scenarios:

- Scenario 1: Under this scenario, the relevant sectoral growth rate is held constant over the entire 20 year period;
- Scenario 2: Under this scenario, the relevant sectoral growth rate is held constant up to year 4, thereafter each sectoral growth rate reduces by 50% and is subsequently held constant for the remainder of the 20 year period; and
- Scenario 3: Under this scenario, the relevant sectoral growth rate is held constant up to year 4, thereafter each sectoral growth rate increases by 50% and is subsequently held constant for the remainder of the 20 year period.

³⁹ This figure is based solely on the benchmarked example in Perthshire.

⁴⁰ The period for which we have a robust forecast

Table 4.6: Total Forecast Jobs Created and Associated Property Needs over 10 years

Zone	Scenario 1			Scenario 2			Scenario 3		
	Additional jobs Created within 10 Years	Number of Jobs recruited locally	Projected Property Need within 10 years (acres)	Additional jobs Created within 10 Years	Number of Jobs recruited locally	Projected Property Need within 10 years (acres)	Additional jobs Created within 10 Years	Number of Jobs recruited locally	Projected Property Need within 10 years
Blaris	492 (created or sustained)	305	56	462 (created or sustained)	286	53	523 (created or sustained)	324	59
Knockmore (Indigenous growth)	930 (created or sustained)	429	31	687 (created or sustained)	317	23	1,378 (created or sustained)	635	46
Knockmore (Inward Investment)	810 (created)	373	27	764 (created)	352	25	859 (created)	396	28
Maze/Long Kesh	2,139 (created)	986	71	2,106 (created)	970	70	2,268 (created)	1,045	76
Total	4,371	2,093	185	4,019	1,925	171	5,028	2,400	209

Table 4.7: Total Forecast Jobs and Associated Property Needs over 20 Year

Zone	Scenario 1			Scenario 2			Scenario 3		
	Additional jobs Created within 20 Years	Number of Jobs recruited locally	Projected Property Need within 20 years (acres)	Additional jobs Created within 20 Years	Number of Jobs recruited locally	Projected Property Need within 20 years (acres)	Additional jobs Created within 20 Years	Number of Jobs recruited locally	Projected Property Need within 20 years (acres)
Blaris	606 (created or sustained)	376	69	513 (created or sustained)	318	58	713 (created or sustained)	442	81
Knockmore (Indigenous growth)	2,148 (created or sustained)	990	72	1,267 (created or sustained)	584	42	3,766 (created or sustained)	1,736	126
Knockmore (Inward Investment)	988 (created)	455	33	844 (created)	389	28	1,155 (created)	532	39
Maze/Long Kesh	2,608 (created)	1,202	87	2,227 (created)	1,027	74	3,408 (created)	1,571	114
Total	6,350	3,023	261	4,851	2,318	202	9,042	4,281	360

4.5 Conclusions

The table below provides an overview of the anticipated jobs created/sustained and the associated property needs for the aforementioned three scenarios across four, ten and twenty year timespans:

Table 4.8: Total Jobs Created/Sustained and Associated Property Needs

	Scenario 1	Scenario 2	Scenario 3
Year 4			
Jobs Created/Sustained	3,396	Same as Scenario 1	
Sourced Locally	1,820	Same as Scenario 1	
Property Needs (acres)	101	Same as Scenario 1	
Year 10			
Jobs Created/Sustained	4,371	4,019	5,028
Sourced Locally	2,093	1,925	2,400
Property Needs (acres)	185	171	209
Year 20			
Jobs Created/Sustained	6,350	4,851	9,042
Sourced Locally	3,023	2,318	4,281
Property Needs (acres)	261	202	360

